Pre-Visit Protocol

Setting Scheduling Calendar

1. Regional Assessors will receive messages concerning programs that have been assigned to them in the Assessor Only section of DMS. In order to access DMS, assessors must log in. You will be asked to enter your user name and password. (http://accreditation.naeyc.org)

2. Refer to the Visit Scheduling Module tutorial in iCohere (http://lms.naeyc.org/iCohere/login/login.cfm) concerning scheduling entry into DMS.

3. Make initial call to program's primary contact. The purpose of this call is to make initial contact and provide them information about setting their scheduling calendar.

Scheduling Window Phone Call

Explain the Scheduling Calendar

"Hi, this is _____________<Assessor Name> from the NAEYC. I am calling to congratulate you on becoming a candidate for NAEYC Accreditation and to begin the visit scheduling process.

- The first thing we need to do is set a scheduling window, which I will be e-mailing to you.
- As you will see, the window begins today _____________ and ends on ______________<visit period date six months from candidacy deadline>.
- You may choose up to 2 exclusion dates per month.
    - If your program is not closed on any days in a month (not including federal or religious holidays), you may choose to identify up to two exclusion days for each month the visit could occur.
    - If you are closed for one day in a month (not including federal or religious holidays) you may choose one exclusion day for that month.
    - If your program is closed for two or more days in a month (not including federal or religious holidays) you may not choose additional exclusion days for that month.
- You will indicate which days you are not available for a visit by placing an X over the date(s).
- Your exclusion calendar **must** note any dates that you are not open for operation.
- Note the Academy will not schedule visits on federal holidays (which are already marked off on the calendar) or on major religious holidays. There is a place on the calendar form for you to list any major holidays your program observes. Note these, but **they do not need to be counted as any of your exclusion days**.
- E-mail or fax it back to me by ______________ <5 business days>.

Verify Number of Groups and That Is How They Actually Function as Reported in Candidacy
"I also need to confirm the number and ages of the groups at your program. My information shows that you have:

- _____ of kindergarten groups,
- _____ of preschool groups,
- _____ of toddler groups,
- and _______ of infant groups.

- Is this still correct? [*Note any changes; programs should submit Fax Cover Page for Staff Changes via fax to the assigned Accreditation Coordinator at the Academy if there has been a change]*
- Are there any children with <u>identified</u> (with IEP, 504 plan, etc.) special needs in any of these groups; if so, which groups? *[Note which groups]*

Verify Staffing as Reported in Candidacy
"Has the teaching staff at your program remained the same?

- Are the teachers working in the same groups as they were at the time of candidacy? [*Note any changes; programs should submit Fax Cover Page for Staff Changes via fax to the assigned Accreditation Coordinator at the Academy if there has been a change]*

- Are the staffing numbers the same? [*Note any changes; programs should submit Fax Cover Page for Staff Changes via fax to the assigned Accreditation Coordinator at the Academy if there has been a change]*

- In addition, you will need to have documentation available for each teacher you listed in candidacy as having Pediatric 1st Aid/CPR. Remember, this is a <u>**required**</u> criterion, so we will have to have documentation on the day of the visit.

    - If the first aid card does not specify pediatric, rescue breathing or blocked airway components, additional documentation is required. The documentation must be issued from the course or course instructor (agenda, course description, letter from the trainer or issuing organization, etc.). **A letter from the program director outlining course specifics is not sufficient.**

<u>*Verify Language of Program*</u>
"What is the current language spoken by teacher and students in your program?

<u>*Verify Documents and Surveys*</u>
"Make sure that all of your documents are available on-site on the day of the visit. If documents for certain criteria will not be available on-site, you must provide a notarized letter stating the content of the document and where it can be found as well as a sample. (For programs needing to create this letter, a sample is available at www.naeyc.org/selfstudy as part of the FAQs)

"I also want to double check that the teaching staff and family surveys, portfolio instructions, and checklists you have used are the ones from <u>Self-Assessment</u>, either from the Self-Assessment CD-ROM or the self-study website, or TORCH. This is very important because the self-study surveys may not accurately convey your findings.

- *[If not]* Have the self-assessment surveys completed and results compiled in time for the assessment visit and go over the other tools to make sure your info is up-to-date. Assessors are prepared to work with Self-Study surveys if you are not able to make the change in time. Also, remember that the Portfolio data must be current within one year of your Candidacy deadline and al evidence must be labeled."

<u>*Verify Additional Information Reported in Candidacy*</u>
"Are there any other circumstances we need to consider when conducting a visit?

- Security/Issues gaining access to the facility?
- Any parking issues/regulations?

Closing
"I will contact you again once I have received your scheduling calendar with the exclusion days and I am able to set the 15-day window for the visit. If you have any questions for me in the mean time, don't hesitate to call. I can be reached by ____. Also, if you do not receive this email within 24 hours, contact me immediately so that I may resend. "

Setting the 15-Day Window

1. Log new information into DMS:

Field	Information
Exclusion dates	*Any dates marked off on calendar*
15 day window	*Pick the window*

** Make sure you click "Update Record" after entering any information on this screen**

2. Generate the "Confirmation of Site Visit" letter in DMS. It will be sent at the end of the call.

3. Before calling the program, Map Quest their address for initial direction information. You will ask them for confirmation about this information during the phone call.

4. Make the 15 day window call to primary contact. The purpose of this call is to inform the program of their 15-day window and to review important information concerning the assessment process with the administrator.

5. Use the telephone conversation to continue to build a collegial relationship with the program administrator. Reviewing the following "checklist" can help set the stage for a positive assessment visit experience. Check each box upon completion during phone and fill in necessary blanks. Return checklist to the Academy after the on-site assessment visit in the envelope with assessment tools.

6. Log information in DMS:

Field	Information
Visit date(s)	*Pick date(s) to visit program* ***(Program is NOT informed of these dates until one business day before)***
Date visit was confirmed	***Date you called about the 15 day window***

** Make sure you click "Update Record" after entering any information on this screen**

7. Send the "Confirmation of Site Visit" letter to the primary and secondary contacts.

8. Randomly select classrooms to receive an observation from **www.randomizer.org**.

9. Create the site visit schedule.

15-Day Window Phone Call

Date Reviewed With Program: ___________________________

Name of Person Reviewed With: __________________________

Inform Program of 15-day window
"I am calling to confirm your site visit. This conversation will probably take 20 minutes to go over the details. Do you have time to talk now? *[If not]* When would be a good time **today** to call you back?

- ➢ Your visit will occur during a 15-day window beginning ___________ and ending on _____________. Your have indicated that _______________ <exclusion days> are the exclusion days within this window. I will be e-mailing you a confirmation letter with additional details for you to review.

- ➢ "Your program is located at __________________________________ <address>, correct? Is this near __________________________<detail about location found on Map Quest>?

- ➢ "I will need a quiet, preferably private workplace during the visit?

- ☐ Let program know how many assessors for how many days they can expect :
  - o _____ assessors for _______ day(s)
  - o If needed, discuss how arrived at number -- This number is influenced by the hours of attendance and schedule of children, with a maximum of 3-4 observations per day, per assessor, and ongoing monitoring of reliability.

- ☐ Review some general guidelines about the day of the visit:
  - o Set arrival time for assessor(s) on day of the visit __________ (When the program begins, or a few minutes after e.g. 10-15 minutes)
  - o After assessors arrive, they will go over the schedule for the day(s).
  - o Let teachers and parents know that assessors will be there to observe and will make every attempt to not disrupt the flow of a typical day; they will not engage children (although if approached will respond in a friendly manner and try to redirect the child) and will not interrupt teaching staff during classroom observations.
  - o Assessors will take a lunch break between a half hour and an hour.

- ☐ Discuss the following in regards to assessors completing **Group Observable Evidence Tool(s)**:
  - o The total number of groups observed will include each eligible age group and 50% of total. If there is more than one classroom in an eligible age group, the group(s) that will be observed is randomly determined by computer.
  - o Inform program that assessors will observe selected classrooms for one continuous hour. They will also review the Classroom Portfolio evidence for each of the classrooms observed.

- ☐ Discuss the **Sources of Evidence** used by the program: (circle one)

- 2006 Sources of Evidence
- 2008 Sources of Evidence

☐ Discuss the following in regards to assessors conducting the **Program Observable Evidence Tool**:
- Components included are based on the Sources of Evidence indicated previously.
- Remind program that they can find the Sources of Evidence for all criteria on the Tools for Self Assessment CD ROM or self-study website, or TORCH.

☐ Discuss the following in regards to assessors completing the **Program Portfolio Review**:
- Discuss updated Sources of Evidence for All Criteria in Tools for Self Assessment.
- Ask how the program chose to organize their program portfolio – 8 Sections OR 10 Standards (circle one).
- Remind program that each document/source of evidence should be labeled with the criteria it pertains to in order to emphasize that we want the program to provide the evidence and not the assessor.

☐ Discuss the following in regards to assessors reviewing **Family and Staff Surveys**:
- Ask program if they used the original surveys OR updated surveys (circle one)
- Assessor will review the EXCEL File Summary Sheets used for tabulating survey results.
- Assessor should also have access to the original surveys completed during self-assessment to verify results reported by the program.

☐ Discuss the following in regards to assessors reviewing **Child and Staff Files**: (Not applicable if using the 2008 Sources of Evidence)
- 10% of Children's Files will be sampled. Program should refer to the Sources of Evidence for criteria requiring documentation in a child's file. The Program does not need to gather these files in advance. Assessor will randomize the files to sample. Many programs supplement children's files with child portfolios. If this is the case, the program will need to supply both for those randomly selected.
- 25% of Staff files will be sampled; program should refer to the Sources of Evidence for criteria requiring documentation in a staff's file. The Program does not need to gather these files in advance, however files of staff no longer employed at the program should be separated from current employees' files. Assessor will randomize the files to sample.

☐ Discuss the purpose of the **Closing Meeting**. The Assessor and Program Administrator together will:

- Document that all assessment forms have been completed and are ready to be sent to NAEYC.

- Discuss and document any Candidacy Requirements and/or Required Criteria with evidence that they are not met gathered during the Assessment Visit:
  - 1.B.09 Physical Punishment
  - 3.C.02 & 3.C.04 Supervision of Children
  - 5.A.03 Pediatric First Aid, including CPR
  - 5.A.12 Infants placed on backs
  - 10.A.02 Administrator Education Qualifications
  - 10.B.04 Licensing/Regulatory Status

- Discuss Next Steps related to the Decision Process.

- Provide Assessor Evaluation which must be completed after the visit and sent to the Academy within 5 days.

☐ Remind program administrator that visits require a full day and some may even continue into the early evening. Discuss any time constraints of participants at the Closing Meeting.

☐ Confirm if there have been any changes in Staff (i.e. new administrator, change of teaching assignments or titles, etc.) since submitting candidacy materials. If yes, the program administrator will contact the Academy and complete the Fax Cover Sheet for Staff Changes.

☐ Confirm if there have been any changes in Groups (i.e. added a group, changed total number children enrolled, serving a new age group, etc.) since submitting Candidacy Materials. If yes, the program will need to contact the Academy and complete the Fax Cover Sheet for Staff Changes. The Assessor should also contact the Academy with that information.

☐ Review information submitted in Candidacy Materials related to languages spoken by staff and children. Confirm that the languages spoken by the Assessor meet the needs of the visit. If not, gather any new details about the groups to determine the need for a bilingual assessor.

☐ List the physical tools the assessor will use during the visit:
- Choke Tube
- Measuring Tape for measuring fall zones
- Trowel to check for playground cushioning.

"Thank you for going over these details with me. I will contact you one business day prior to the visit to let you know we will be coming the next business day. If the visit will be on a Monday we will contact you the Friday prior.

- Is the number I called today the best number to reach you at for this call? *[if not, make note of new/additional number(s)]*
- Is there any other contact information in case there are any unforeseen circumstances (i.e. Snow day, etc.)?
- If I am unable to reach you, I will leave a message—either on voice mail or with whomever answers. If I need to leave a message I will also attempt to reach the

secondary contact __________________<name> and notify him/her or leave and additional message. These messages will serve as business day prior notice.

"If for any reason you choose to cancel the site visit following today's confirmation, there will be a cancellation fee. Refer to the NAEYC website for amount that will be charged based on the size of your program."

"Contact me immediately if there are any changes that could affect the visit. You can reach me at ______________________."

Business Day Prior Call

Call the primary contact number one on the business day prior to your scheduled visit. If the visit is on a Monday then call on Friday, if the visit is the day after an exclusion day then call on the last fully operational day. If you are unable to reach primary contact, leave visit information on voice-mail or with another party (note the persons name with whom the message was left and the time). Ask contact to call you if they have questions and let them know you will attempt to call secondary contact. Call secondary contact if unable to reach primary contact and leave a second message with visit information.

<u>Inform Program of Business Day Prior</u>
This is ________________ from NAEYC. I am calling to let you know that your site visit is scheduled for tomorrow *[or next business day]*. This is just a reminder that my co-assessor _____________ and I will be at your center for ______________<#> days. We will arrive at _________<time program begins or within ten minutes but no earlier than 6AM>. At that time we'll go over the schedule for the day so you'll know the order of things.

<u>Confirm Staffing</u>
"Have there been any **changes in staff** (i.e. new administrator, change of teaching assignments or titles, etc.) since we last spoke? [*Note any changes; programs should submit Fax Cover Page for Staff Changes to the assigned Accreditation Coordinator at the Academy if there has been a change]*

"Have there been any **changes in groups** (i.e. added a group, changed total number children enrolled, serving a new age group, etc.) since we last spoke? [*Note any changes; programs should submit Fax Cover Page for Staff Changes to the assigned Accreditation Coordinator at the Academy if there has been a change]*

<u>Reminders</u>
Just as a reminder, have your program portfolio, classroom portfolios, teacher & family surveys, and staff & child files available (if using the 2006 Sources of Evidence). Separate your active staff files from inactive files.

"<Co assessor name> and I are looking forward to our visit tomorrow!" Print enough copies of the site visit Schedule for the program administrator and all assessors involved.