

# NAEYC's Streamlined Accreditation Site Visit Protocol

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## 1. Introduction

The program you will be visiting as part of the NAEYC Early Childhood Program Accreditation process has shown a tremendous commitment to providing high quality early childhood education. Your arrival at their facility is the final step in their process of pursuing NAEYC Accreditation. It is important to show the utmost respect to all of the program and teaching staff as well as the children and their families throughout your time at the program.

In order that all programs receiving a site visit for NAEYC Early Childhood Program Accreditation receive a fair and equitable assessment, all NAEYC assessors must collect and report data consistently. The following protocol has been established to ensure that NAEYC's Accreditation system is reliable and credible. All assessors must adhere to this protocol when conducting a site visit.

### **NAEYC's Streamlined Accreditation Assessment launched in 2017**

**NAEYC has developed streamlined resources, methods, and assessment tools for conducting accreditation site visits. The enhanced site visit tools include new, transparent assessment items that are aligned with our current standards and best practices. The tools are designed to assess the NAEYC best practices most indicative of high quality programs, and to deemphasize basic practices that are often assessed by state licensing agencies. The new assessment also includes an expanded, reconfigured Standard 6.**

**Although there are new items on the site visit assessment tools, most aspects of the site visit protocol remain the same as NAEYC's previous assessment system. However, one major difference is that Self-Assessment Family Survey and Teaching Staff Survey evidence is not collected during the site visit.**

Currently, NAEYC-accredited programs may pursue accreditation for the school-age (SA) components of their programs. This [School-Age Accreditation](#) option is part of a pilot program from NAEYC. See Section 9 of this protocol for specific guidelines for completing NAEYC accreditation visits for programs seeking to combine their renewal accreditation visit with a School-Age pilot program assessment.

## 2. General Protocol

**Sources of Evidence (SOE).** Programs are evaluated on 4 sources of evidence: program portfolio, class portfolios, class observations and program observation.

**Accreditation Visit Schedule.** A visit schedule is created for each program visit. It shows time allowances for each planned task, including class observations, ratings of portfolios, opening and closing meetings, and time to complete forms and worksheets. The lead assessor is responsible for preparing and printing the schedule prior to arrival at the program. Examples of streamlined accreditation visit schedules can be found in the *Assessor Google Site*. See the Streamlined Pre-Visit Protocol for more information. Bring a hard copy of the schedule for the program administrator.

**Changes.** Each assessor should annotate his or her copy during the visit to show the actual times each scheduled task was performed. Assessors should record actual task start and finish times even if those times are identical to the scheduled times already on the schedule. Before the end of the visit, the lead assessor is responsible for creating a final annotated copy of the visit schedule, showing the actual time all tasks were begun and ended, and by whom. This annotated final schedule becomes part of the accreditation visit process verification procedure and must be submitted to NAEYC along with the visit process forms outlined below within 5 business days of the visit.

**NAEYC visit documents.** NAEYC visit documents are of 3 types: rating tools, forms, and worksheets. Worksheets are proprietary and are NOT to be shown to, or otherwise shared with, program administrators or staff during the visit. Forms are shared with the program as blank versions before the visit and in completed versions after the visit. **The content of the new streamlined assessment rating tools is now fully transparent to programs. However, assessors do not share any part of completed tools with the program.**

A set of the digitized, writable PDF assessment tools, process forms and worksheets can be found on the **Streamlined Site Visit Document Master List**, found on the Assessor Google Site. Assessors download these visit documents onto their tablets, creating a set for each program visit. Details of the download process are to be found in the *Streamlined Accreditation Pre-Visit Protocol and Procedures* which is available to assessors.

The visit documents have been formatted and optimized for use on tablets. In the event that there is a catastrophic failure of the tablet the assessor will need to print the forms, tools and worksheets to complete the visit. To print digital forms, tools and worksheets you must adjust the printer's default settings to allow the pages to fit standard letter-sized paper. Look for print options such as "fit to page", "scale to page", "shrink to printable area", etc. If you are at a copy center, just tell the copy clerk the documents need this adjustment to printing. You will find the adjusted documents are very legible.

You may also wish to print out the **NAEYC Streamlined Items for Site Visit Assessment**. This document can be found **on the Early Learning Programs website**. Assessors should save a copy of this document in their G-drive, or on an alternative back-up source.

**Arrival.** If more than one assessor will be part of the assessment, plan to meet outside the program and enter as a team. If the program opens at 7 AM or earlier, arrive between 7:00 and 7:15 AM; otherwise arrive within 15 minutes after the program's opening time. However, if the program opens before 7 AM, assessors may decide to arrive as early as 6 AM to accommodate other scheduling needs. For example, if starting the visit after 6 AM would change from a 1 day visit to a 2 day visit, the assessor must start at 6 AM. Assessors do not need to consult NAEYC for prior approval to make this time adjustment.

**ID.** Wear NAEYC identification badges during accreditation visits.

**Accepting refreshments and resources.** Assessors should be prepared to carry meals, snacks, drinks, office supplies, and a mobile phone to the site, or should have informed themselves of available resources nearby before the start of the visit. With a few exceptions, assessors may NOT accept refreshments or resources (phone use, office supplies) from the program. The exceptions are:

- Assessors may accept water from programs at all times.
- Assessors may accept coffee or tea if the program normally provides these beverages on site. Assessors may not accept coffee or tea purchased for them off-site.
- Assessors may accept other light refreshments if failing to do so would offend the cultural norms of the program.
- Assessors may ask to have the program make copies of the paper documents still in use on the visit (schedule, MERF, RIDF). If an assessor needs to print or photocopy additional documents in order to conduct the accreditation visit, the assessor may ask for permission to use the program's computer, printer and/or photocopier. This should be a rare occurrence – only if the assessor experiences a technical difficulty with digital data collection and needs to revert to paper forms or tools. If you must copy at a visit site, you must do it yourself (or stand by while staff helps you access the documents). You cannot give proprietary documents to program staff. Offer to pay the program for printing or copying. If there is a charge, pay it and submit the expense to NAEYC.

**Demeanor.** Be cordial and pleasant (Smile!) when interacting with staff and children. Remember that staff may be nervous about your visit and they will do their best if you can put them at ease. While you should do minimal talking in the classrooms during observations, you may certainly make common small talk with staff. Do respond briefly to children when *not* doing so would set an awkward tone. Move if you are in the way of program administrators, teachers, children or families.

**Dress.** Wear functional “business casual” clothing for visits. You can expect to go outside, sit in tiny chairs or on the floor, and spend long hours at programs. Dress appropriately. Consider wearing layers, as you never know if a program's facility will be too hot or cold. Also, do not wear anything (jewelry, bright clothes) that calls attention to you. You want to blend into the background as unobtrusive as possible.

**Your belongings.** Limit the personal belongings you take into a program. Whenever possible leave personal items in a locked car. However, if this is not possible, consult with the program administrator to find a safe location to store your belongings during the visit. This is an important safety precaution as purses and bags can contain items dangerous to children.

If you bring food into the program, be aware of food restrictions that might be in effect. For example, if the program forbids peanut products throughout the facility due to a severe allergy, do not bring such products into the center.

**Lunch break.** Lunch breaks are recommended, but it is left up to the individual assessor to decide whether to work through lunch, eat on premises, or take a longer break off premises. If you leave the premises for a lunch break, notify the program staff when you are coming and going. Secure all equipment (e.g., tablet) and confidential or proprietary information while you are off the premises.

**Telecommunications.** If you carry your mobile phone into the program, be sure it is in silent mode so that you do not interrupt the on-going program activities/environment. *Do not make or receive phone calls during class observations.* If your tablet is enabled to notify you of email or text messages, do not open or send emails or text messages during class observations.

**Closets.** Do not look through closets, drawers, cabinets, or other closed spaces without first getting the program administrator's permission. General permission to look where needed should be obtained at the Orientation Meeting (see below).

**Order of tasks during the accreditation visit.** Some visit tasks must be done in a specified sequence, or at a specific time with respect to the beginning or end of the visit. Other tasks may be ordered in whatever way best suits the assessor's appraisal of the program's schedule and the assessor's needs. Factors affecting scheduling and order of tasks include:

- time of day the program opens and closes
- whether classes to be observed meet full days, part days, and/or not every day
- whether classes to be observed have nap times
- size of the program, including whether the program is a program with satellite locations

The following tasks must be executed in a specified sequence or at a specific time:

- **Orientation Meeting:** Immediately upon arrival on the first day of a visit. There are a number of information-gathering and information-giving tasks that must be done as part of the Orientation Meeting.
- **Missing Evidence Request Form (MERF):** Compile missing evidence during review of the Program Portfolio. Complete the form and present it to the administrator about 2 hours before the end of the visit. Receive additional evidence and complete tool ratings about 1 hour before the end of the visit.
- **Closing Meeting:** Last scheduled task on last day of visit. Several forms, such as the *Visit Signature Form* and the *Process Verification Form*, are completed during the Closing Meeting. Most other tasks and forms must be completed before the Closing Meeting.

The remaining tasks described below can be done in any sequence. Note that some of them do require specific time durations, or minimum (*"Allow AT LEAST xx minutes"*) durations. Some task durations, such as those for orientation and closing meetings, are given as estimates (*"Allow about xx minutes"*) to be used in constructing the schedule. **Schedule templates have been created and are available on the Assessor Google Site. Assessors must tailor the provided templates to the specifications needed for each site visit.**

### 3. Orientation Meeting with the Program Administrator

*(Allow about 30 minutes)*

The accreditation visit begins with an orientation meeting between the assessor(s) and the program administrator.

**Introductions.** The lead assessor should identify him- or herself as such, and introduce all other assessors. If this is a reliability visit or a research visit, remind the program administrator and staff that this is the case. If you are doing a two day visit, give the program administrator your cell phone number so program staff will be able to contact you by phone if a problem arises after hours, between your days at the program.

**Schedule.** Review the Accreditation Visit Schedule and provide a copy to the program administrator. Leave the names of the teaching staff off of the schedule prior to the Orientation Meeting. At this time, ask the program administrator for the names of the teaching staff who will be with each randomly selected class for observation and add them into the schedule. Ask the administrator if any **other staff members (e.g., floaters, subs)** are scheduled to be in the classes during the observations; note these on the schedule as well.

As you review each class with the program administrator, confirm the age category(s) for each class. If there are mixed-age classes (e.g., Infant and Toddler/Two combined) verbally confirm with the program that they are prepared for you to rate the Class Portfolio using items from each age category, as well as assess the class through observation using the items in each age category.

Verify that you are observing at least half of the total number of all classes (to a maximum of 10 observations), and seeing at least one example of each age category in the program. Also verify that the scheduled times for class observations are times when those classes are in session and not napping. For programs with infant classes verify that all infants are not anticipated to be asleep during the scheduled observation time. (Note: Any time when a class is in session with one or more awake children is a valid time to observe.)

**Schedule problems.** Observation times should NOT be moved or rescheduled around ‘specials’ such as art, music, or walks. Observation times may be moved or changed if a class is going on a field trip, will be transported off-site, or is not in session for some other reason. If there are no children present for a selected class on the scheduled day, if it is a 2-day visit you must rearrange the visit schedule to conduct the observation on the other day. If you have a 1-day visit, or no children are expected for both visit days, AND there is no other class of children within the age category (infant, toddler/two, preschool, kindergarten, school-age), you will be unable to conduct an observation for the age category. Call NAEYC to inform Quality Assessment staff of this protocol problem and to assure that you have problem-solved as best you can. **There is no longer a CP back-up protocol and tool to use in this circumstance.**

**Children with special needs.** For each class that will receive an observation, confirm which classes include children with identified special needs, and identify the types of special needs.

**Portfolios.** Tell the program administrator that only the Class Portfolios for the selected classrooms will be reviewed. Ask where you will be reviewing portfolios, and confirm that the portfolios are available for you. If not, ask the administrator to bring all selected portfolios to your reviewing space after the orientation meeting is completed.

E-portfolios. If the program has created electronic class or program portfolios, verify that the schedule allows time (10 – 15 minutes) for program staff to orient you to the portfolio software, computer and logistics. This is not a time in which evidence is being assessed, but rather an opportunity to understand the mechanics and navigation of the electronic portfolio(s). This may include the password(s) and log-in information necessary to complete the review, location of the portfolio on the computer, and other such information. All passwords and log-in information will remain confidential.

Staff first aid and CPR documentation. Confirm that documentation of first aid and CPR training is available in or with the Program Portfolio. These documents are reviewed with class staffing schedules to rate required item 5A-811.

**Survey evidence** is no longer collected in the site visit.

**Review accreditation visit process forms.** These forms are available to the Program Administrator in the *Administrator Information Packet*, emailed to the administrator prior to the visit. View the digital forms on your tablet with the Program Administrator. Review the hardcopy versions of *Missing Evidence Request Form* and *Required Item Diagram Form*. Briefly explain the purpose of each form, and answer any questions the administrator may have.

**Access to materials.** Tell the program administrator that you will be looking through books, CDs and other materials in the classrooms during observations. Ask for permission to open closets, cabinets and drawers while in classrooms, in order to best make ratings of which items are met. If necessary, clarify with the administrator which spaces in each classroom may or may not be accessed.

Note to administrator: The assessor can only give credit for materials and equipment that he or she has access to. It is generally to the program’s advantage to allow access to classroom storage areas during the site visit.

**Tamper-resistant outlets.** Ask the program administrator if the program has any tamper resistant outlets in the center. If only some classes utilize tamper resistant outlets, confirm which classes and note this on the *Process Verification Form*.

**Data collection physical tools.** Show the program administrator the physical tools used to ensure accurate data collection:

- *Assessor tablet* containing the rating tools, forms and worksheets.
- *Choke tube* for assistance in determining if toys are too small for infants and toddlers.
- *Disposable booties* for use in infant rooms.

**Facility Orientation.** Ask the program administrator for a short guided walk through the facility. Make it clear that this is not the official Program Observation data collection time, but just an orientation. Identify the location where the assessor's review of the program documentation (portfolios, surveys, etc.) can be completed in private. Identify the bathrooms you may use. If the program occupies part of a larger facility, be sure you understand where the program's space begins and ends.

**Ask the program administrator to show you where staff store their personal belongings. Also ask to see if there is an area set aside for nursing mothers (only rated for programs serving infants).**

If possible during the facility orientation, touch base with the teaching staff of any infant classes to be observed to determine if all infants are anticipated to be asleep during the scheduled observation. You will have already asked the program administrator, but often classroom staff knows more precisely.

**Meeting completion.** Finally, review the *Process Verification Form*, confirming that all Orientation Meeting tasks were addressed and that the corresponding check boxes are checked. Note on the visit schedule the time the Orientation Meeting ends. Thank the program administrator, smile, and begin the assessment!

## 4. Accreditation Visit Tools

This section describes the rating tools used during the site visit. Each of the visit tools includes a "Notes Page" following the item rating pages. The notes page includes a series of brief global rating scales and a space for open-ended narrative notes. The global rating scales must be completed on all tools. Assessors may make item-specific comments anywhere on any tool (right margins preferred); however general notes should be included on the Notes Page.

### **Program Portfolio (*Allow 2 hours*)**

Program Portfolio (PP) evidence may be organized and presented in a variety of ways. You may see crates and/or binders of information, or an e-portfolio on a computer. Evidence may be arranged by standards and items or by some other organizational scheme. Programs are asked to clearly highlight and/or label each piece of evidence with the item(s) they believe it meets. However, it is possible that this may not have been done. If the evidence provided is not well organized or labeled, review the information given and do your best to rate each item on the *Program Portfolio* tool.

When using the PP tool on your tablet, it is recommended that assessors plug the tablet into an outlet in order to preserve battery life for observations. Assessors must complete the rating scales on the PP Notes Page following the completion of the PP. End notes are optional for this tool, but very helpful if a number of items must be rated no for the same reason (e.g., no evidence provided).

Duration and scheduling of PP review. Because it takes a long time to review the Program Portfolio, assessors may divide the 2 hour allotment for PP review into 2 separate times on the schedule. However, if the PP review time is separated the review must still be completed in one day (for two day visits) and by one assessor (for visits with multiple assessors). It is important to thoroughly review the PP. If your review takes less than an hour, explain why on the Notes Page. If either Notes Page rating scale is given a '1' or '2' rating, provide more detail in the narrative notes section of the page.

Missing evidence. There is an opportunity to provide the program administrator with a written list of missing evidence (see *Missing Evidence Request Form (MERF)* procedure, below) near the end of the accreditation visit. Compile a list of missing PP evidence onto the *MERF* as you review the Program Portfolio. The *MERF* document is in a paper format.

Assessing staff educational qualifications. Because the assessment of staff educational qualifications is a complex process requiring review of many documents, it is performed by NAEYC staff in advance of the accreditation visit. Documentation of educational level of teaching and administrative staff is received when programs submit their candidacy or renewal materials. NAEYC staff review documentation for all professional staff and make ratings of whether the program meets the 4 items related to educational qualifications. These ratings contribute to the accreditation outcome decision but are not assessed during the accreditation visit.

Assessing required Items 5A-811 and 10B-1322. In order to rate these items in the Program Portfolio, assessors must first complete 2 digital worksheets (included in the Worksheets Document):

- Complete the *First Aid and CPR Worksheet* by verifying **staffing patterns against** pediatric first aid and pediatric CPR training documentation. Follow directions on the worksheet and, if necessary, on the *Missing Evidence Request Form* in order to arrive at a final rating for 5A-811 on the Program Portfolio. See detailed instructions for these forms below.
- Complete the *License to Operate Worksheet* by verifying that the program is currently licensed or regulated. See detailed instructions for this form below.

### **Class Portfolios** (*Allow 30 minutes each*)

Class Portfolios (CPs) should be reviewed in a private location. Class portfolios are rated for only the classes selected for observation in the randomization protocol. When reviewing CPs, we suggest you plug your tablet into an outlet to preserve battery life for observations.

Shared CPs. Programs are permitted to submit a single class portfolio to represent more than one class. Typically this is done when teaching staff work together in planning and implementing the curriculum; when the age categories of the classes are the same; and when the experiences of the children in each class are very similar. Programs may choose to streamline CPs outside of these guidelines as well. Rate shared CPs based on the program's description. If you have any concerns about whether the CP provides adequate evidence for all the classes it was said to represent, make note of that on the CP Notes Page.

Assessors rate a shared class portfolio only once, completing a single CP tool. Note on the cover page all the classes to which the rating applies; name the digital CP document to show all the classes to which it applies (for example, "123456CP1and3"; see Pre-Visit Protocol and Procedures-AV for details). Your visit schedule should correctly reflect that multiple classes were rated on a single CP review.

Relationship to Observational Evidence. Assessors may schedule the review of a class's CP either before or after the time of the class's observation. In either case, a class's CP evidence must be rated independently of what was directly observed in the classroom. Evidence from each source must stand on its own.

Notes Page: Assessors must complete the rating scales on the CP Notes Page following the completion of the CP. Narrative notes are optional for this tool. However, if either Notes Page rating scale is given a '1' or '2' rating, provide more detail in the narrative notes section of the page. Also, if it took less than 20 minutes or more than 45 minutes to review a CP, explain why.

### **Program Observation (PO)** (*Allow 15 -- 30 minutes depending on program size*)

The *Program Observation (PO)* tool contains a set of items that require overall review of the program facility, both inside and outside. **All items related to the physical characteristics of outdoor learning environments are included on the PO tool.** The PO also assesses the adult spaces of the program. If you

are assessing a program with satellite locations, conduct only one PO assessment, at the site with the largest number of classrooms.

Note that the program observation made while completing the *PO* tool is not the same as the facility orientation done as part of the Orientation Meeting. Assessors must complete the *PO* tool unaccompanied by program staff. And like other observable ratings, *PO* tool ratings must be made while the observation is in progress -- not afterward.

Notes Page: Assessors must complete the rating scales on the *PO* Notes Page following the completion of the *PO*. Narrative notes are optional for this tool.

## Class Observation (CO)

*Allow EXACTLY 1 hour for direct observation of children and teachers. **If needed, an optional 10 minutes may be taken to complete ratings of physical environment elements in the primary classroom environment. Time exceptions are no longer needed to rate outdoor environment elements, because these have all been moved to Program Observation. For infant classes, an optional 10 minutes may be taken if no children are awake for at least 20 minutes of the standard 1-hour observation period. Assessors do not need to schedule any 10-minute exceptions.***

Selection of classes to observe. Random selection of classes for observation is necessary to maintaining the validity of the NAEYC Accreditation system. Random selection is a research-based practice that allows for confidence in the assessment system by assuring that no human bias factors potentially contribute to the decision as to which classes are observed. Classes are selected prior to the accreditation visit and are shared with the program administrator during the Orientation Meeting.

Detailed information about selection of classes can be found in the *Streamlined Pre-Visit Protocol and Procedures*.

Guidelines for Conducting Class Observations. The following guidelines will help ensure that the class observation process is conducted as unobtrusively as possible and will help to make this a positive experience for everyone involved.

- Begin a class observation if the class includes at least one awake child and one teaching staff member. Do not begin an observation if no children have arrived, or if all children have departed for the day, or if there are children present but they are all asleep.
- Class observations should last exactly one hour (no more nor less than 60 minutes). This means that you stay with children and staff for one hour, wherever they are. However, there are exceptions to the 60 minute time rule. **You are allowed an additional 10-minutes of observing time (1) if you do not get to adequately observe the class's primary interior environment, and/or (2) if infant observations result in less than 20 minutes of "awake" time.**
- Be sure the time you start the class observation is noted on the CO cover page along with the time you leave the class. There is also a place on the cover page to record the start and stop times of 10-minute additional time(s) if you need them.
- Special Protocol for Infant Classes: When observing infant classes, you may begin an observation if at least one infant is awake. **However, at least 30 minutes of total awake time must be observed; the minutes of "awake" time do not need to be consecutive. If 30 minutes of awake time has not been observed by the end of the 60 minute observation, observe the class for additional time until a total of 30 minutes of awake time is observed:**
  - If at least one child is awake at the end of the regular period, continue the observation.

- If no child is awake at the end of the regular 1-hour period, speak with the staff to arrange an appropriate time to return to the class when the children will most likely be awake.

Make a notation of the total awake time and any time frames in which all infants are asleep on the CO Notes page.

- Upon starting each observation, confirm the names of the teaching staff present and the status of other adults present (parents, volunteers). It may be that you can determine the names of the staff present by reading their nametags, seeing their photos posted, or listening to their conversation. If none of these means is available, briefly ask staff to confirm names, and then begin the observation. You do not need to ask staff about children with special needs, or ask them about looking through closets and cabinets.  
**Protocol change: Assessors do not need to note which staff are present with the class as part of the rating of first aid / CPR coverage. This is now assessed by required item 5A-811, which reviews Program Portfolio evidence only.**
- Refrain from talking to other assessors when you are in the classroom. Keep all talk to a minimum. Do not interfere with the class activities in any way. Be as unobtrusive as possible. Move if you are in the way of teachers or children.
- Station yourself around the perimeter of the classroom as inconspicuously as possible. You may walk around to get a better vantage point during the observation. When observing with another assessor, stay inside or go outside together.
- You may sit in a chair or on the floor. Do not sit on other furniture such as shelves, tables, the children's chairs near an activity table, or on play equipment.
- Silence your cell phone and/or your tablet. Do not receive or make phone calls or view text messages during observations.
- Try to keep a pleasant or neutral facial expression so children and/or staff are neither drawn to you nor concerned about your response to them. You may acknowledge children if they approach you, but do not otherwise take part in classroom activity. You can tell them that you are watching them play today or that you have to finish your work.
- Remember when conducting the class observation, you are considering the full experience of the children in the identified class. Therefore, in instances where two or more classes are combined (for example, in the outdoor space), all teacher – child interactions should be considered when completing ratings.
- Remember to bring your choke tube into infant/toddler/two observations. Wear your booties into infant rooms that do not allow shoes. Bring your outdoor wear if there is a chance you will be following a class outside during the hour.
- Notes: Assessors are required to make notes within the CO Notes Page, and to complete the rating scales. Note generally what went on in the observation period. When writing notes, keep the notes as objective as possible. State the facts and describe what you are seeing. Do not give general information regarding the program, the weather, or situations unless they have affected the observation.

Item-specific notes: It is helpful (but not required) to make item-specific notes in the margins throughout the tool, if you have rated an item unmet. Your tablet app has a pop-up note function that can be used for this purpose.

Notes about possibly unmet required items: If an assessor witnesses the possible failure of a required item during an observation, the assessor is required to write detailed notes describing what child and/or adult was involved, the time or duration of the incident (if applicable) and the setting. Rather than include all the notes on the CO Notes Page, assessors should pull up the *Required Item Report Form (RIRF-1)* during the observation and make the notes describing the situation directly on the RIRF-1. Just make a note on the

CO Notes page stating that a detailed description of a possibly failed required item can be found on the RIRF-1. If you need to draw a sketch or diagram of the setting, use the *Required Item Diagram Form (RIDF)*, a paper document). Note on the CO Notes page that a diagram was completed.

- If an infant is observed being placed to sleep in a position other than his/her back (required item 5A-920), at the end of the observation confirm the name and age of the child. If the infant is 12 months or younger you will request a doctor's note for that child on the *Missing Evidence Request Form (MERF)*. See the MERF procedures (Section 7) for further information.
- **If the class goes outside during the observation, your task is to continue to observe and evaluate curriculum, teaching and relationship practices. The rating of physical characteristics of the outdoor learning environment is now made on the Program Observation tool.**

**NAEYC Teaching Staff Surveys and Family Surveys: Surveys are no longer assessed during the site visit.**

## 5. Required Items

Required items are those that are considered essential to program quality. Failure to meet any one of these items during the site visit will trigger a specific write-up by the assessor, and will require post-visit follow-up by the program.

These are the required items, in brief:

Required item	Source of Evidence	Item Description
1B-31	Class Observation	Guidance/discipline practices observed
3C-577	Class Observation	Infant/toddler/two supervision practices observed
3C-578	Class Observation	Infant/toddler/two supervision practices observed
3C-1543	Class Observation	Infant/toddler/two supervision practices observed
3C-587	Class Observation	Preschool supervision practices observed
3C-588	Class Observation	Preschool supervision practices observed
3C-1601	Class Observation	Preschool supervision practices observed
3C-591	Class Observation	Kindergarten/ school age supervision practices observed
5A-920	Class Observation	Infants placed on backs to sleep -- observed
5A-921	Class Observation	Infants placed to sleep in safe sleep equipment only - observed
5A-922	Class Observation	Infants moved to safe sleep equipment if sleeping elsewhere - observed
1B-32	Program Portfolio	Guidance/discipline policy
3C-579	Program Portfolio	Infant/toddler/two supervision policy
3C-589	Program Portfolio	Preschool/ kindergarten/ school age supervision policy
5A-811	Program Portfolio	Program staffing patterns show each class has first aid/CPR staff present at all times.
5A-928	Program Portfolio	Acknowledgment that infant sleep equipment meets CPSC standards
5A-929	Program Portfolio	Infant safe sleep policy
10B-1322	Program Portfolio	Program is licensed or regulated, and in good standing

If at any time during a visit the assessor reviews documentary evidence or directly observes evidence of failure to comply with any of the listed items, this protocol is followed:

Complete the *Required Item Report Form (RIRF-1)*. All possible failures of these items are reported on the RIRF-1; see Section 7 for details about this form and other forms related to required item reporting and follow-up. RIRF-1 is shared with the program at the Closing Meeting.

Notes Page of tool. Assessors should also indicate on the CO or PP Notes Page that there was a possible failure of a required item and that detailed notes are found on the RIRF-1.

Complete the Visit? If a child is in *immediate risk for harm or abuse*, the assessor should halt the observation or other site visit procedures and intervene. NAEYC's code of ethical conduct calls for active response in such cases. Call NAEYC staff during the site visit to report if an incident has occurred that caused you to halt an observation, or that may need to be reported to state licensing authorities. Be ready to describe the details of what happened, who was involved, and when it took place.

**Required Items Worksheets.** Two assessor worksheets have been created to assist the assessor in compiling evidence relevant to required items:

- *First Aid and CPR Worksheet*
- *License to Operate Worksheet*

See Section 6 below for more information on how these function in the assessment of required items.

**Required Items on the *Missing Evidence Request Form (MERF)*.** For items rated on Program Portfolio, the assessor lists the item on the MERF, and final assessment takes place after MERF evidence has been returned. Assessors cannot accept additional portfolio evidence during the Closing Meeting, and cannot change required item ratings once the meeting has begun. Required items are listed on the MERF for these reasons:

- Evidence for a required item is *missing* from the Program Portfolio
- The evidence provided in the Program Portfolio *does not meet* the required item
- A child 12 months or younger was seen placed to sleep in a position other than on his back, and you need to ask if there is a doctor's note (5A-920)
- A signed copy of the Infant Sleep Acknowledgement Form is missing from the Program Portfolio (5A-928).

See Section 7 below for further details about the *MERF*.

## 6. Assessor Worksheets

Assessor worksheets have been created to aid the assessor in completing some tasks and ratings. The worksheets are bundled together as a single document (Worksheets Document). These worksheets are also available as stand-alone documents to be used when co-assessors are working together. Each of these worksheets are completed prior to, during, or after the site visit. These worksheets are completed during the site visit:

**First Aid and CPR Worksheet.** This is used to determine if each class is routinely staffed with at least one staff member who has current pediatric first aid and pediatric CPR certifications. **This is now only assessed through Program Portfolio; assessors will no longer rate this item for only staff present during class observations. Assessors must complete the worksheet by matching staffing pattern documents with evidence of teaching staff first aid and CPR training certifications for every class in the program (not just those observed). Rate 5A-811 in the PP tool as "yes" or "no" based on completion of the *First Aid and CPR Worksheet*. If 5A-811 is rated as not met, list it on the MERF. If still unmet after MERF evidence is returned, report it on the RIRF-1.**

**License to Operate Worksheet.** This is used to determine if the program has a full, current and valid license issued by their licensing or regulatory body. Assessors must complete the *License to Operate Worksheet* before rating this item. The program's license should be included in the Program Portfolio. If the license is current and valid, required item 10B-1322 is rated 'Yes.'

Temporary, Provisional, Probationary or Expired Licenses: If the license is in a temporary, provisional, probationary or expired status, put 10B-1322 on the MERF and request a current, valid license. If the program produces a current and valid license, rate 10B-1322 'Yes' on PP. If 10B-1322 remains unmet after MERF evidence is returned, list it as a possible failure on the RIRF-1.

License Exempt Programs: If a program is license-exempt, indicate that additional documentation is needed for item 10B-1322 on the MERF and give the administrator the *License-Exempt Acknowledgement Form* at the time of the MERF. If the program executes and returns the form, 10B-1322 is met. If the program does not execute the form on the day of the visit, rate 10B-1322 as possibly not met on the RIRF-1. The program may choose to submit the completed form up to five business days after the visit. See the *License-Exempt Acknowledgement Form* for further instruction.

## 7. Visit Process Forms

Visit process forms are used by the assessor during the site visit to document that the site visit process was completely and accurately conducted. While the forms are not used to collect the evidence for making the accreditation decision itself, they provide evidence that all site visit procedures were followed. The forms also create structure for certain tasks during the site visit process. One form (*Visit Signature Form*) includes lines for signatures of assessors and program administrators; by signing they acknowledge that site visit procedures were conducted as described. Site visit process forms provide crucial evidence that may be called upon in the event that a program appeals its accreditation decision.

Blank copies of site visit process forms are combined into a non-writable PDF document called the *Administrator Information Packet*. The packet also includes additional information for programs. A web link to the Administrator Information Packet is sent to the administrator prior to the visit (see Pre-Visit Protocol-AV). The assessor reviews the forms with the administrator during the Orientation Meeting.

With the exception of the *Accreditation Visit Schedule*, *Missing Evidence Request Form*, and *Required Item Diagram Form*, all forms are in digitized format and are completed on a tablet. For assessors' ease of access during the visit, many of the digitized forms are combined into a single writable PDF document called the *Forms Document*. Completed digital copies of these forms are transmitted to the program administrator following the visit.

### Process Verification Form

*(Time to complete this form is included in Orientation Meeting and Closing Meeting)*

The *Process Verification Form* is a checklist that guides assessors through tasks that must occur at the beginning and end of the visit. It ensures the reliability and validity of the visit assessment by providing a framework for execution of many details of the visit protocol.

The Orientation Meeting Checklist is completed during the Orientation Meeting. It reminds the assessor of all necessary information-giving and information-gathering steps to be completed during the meeting. At the end of the Orientation Meeting the assessor reviews the checklist with the program administrator, confirming that all tasks have been addressed. Complete the Orientation Meeting Checklist section titled 'All Visits' and the specific section for "Accreditation Visit".

The Closing Meeting Checklist is completed during the Closing Meeting, the last task of the visit. The checklist on this part of the form reminds the assessor to review or report the information on various completed visit

forms. The assessor(s) and the program administrator verify on the *Signature Form* that this form has been reviewed and is correct.

### Missing Evidence Request Form: Accreditation Visit (MERF)

*(Compile during Program Portfolio review; schedule 5 minutes to review returned evidence)*

About the MERF. The *Missing Evidence Request Form: Accreditation Visit* provides the program an opportunity to locate existing documentation that the assessor may not have found when reviewing the Program Portfolio. It may also be used to:

- Request a copy of the Infant Sleep Acknowledgement Form; and/or
- Request a Doctor's Note for a child if a child 12 months or younger was seen being placed to sleep in a position other than on his/her back.

Use the MERF only to request *missing* evidence. If evidence is presented that does not meet the requirements for an item, no further evidence should be requested. **See the section on Required Items (above) for an exception to this rule relating to required items.** More detailed information about the *MERF* (and the form itself) are included in the *Administrator Information Packet*, sent before the visit. The format and purpose of the MERF is reviewed with the program administrator during the Orientation Meeting and questions about it may be answered at that time.

Completing the MERF. The *MERF* is completed on paper, not digitally, because when completed it must be given to the program administrator during the visit, and later returned to the assessor. Instructions for assessors are included on the form.

- List the individual Program Portfolio item, then briefly describe the content of the item.
- If all of the items for an entire standard are missing from the Program Portfolio, simply write on the *MERF*

“All Standard xx items for which Program Portfolio evidence is required”

or something similar. Do not list individual items.

There is a small table on the *MERF* showing which items are required items, and which are emerging practice items. Circle any items in this table that you have listed, including any items that you did not list explicitly because they are part of an entire missing standard. This gives the program administrator a way to prioritize the missing evidence task.

If evidence is missing for required item 10B-1322, the assessor might need to direct the program administrator to review and complete the *License-Exempt Acknowledgment Form*; a copy of this form is included in the *Administrator Information Packet*. See detailed instructions for this form (below) to know when this might be needed. If so, the assessor should check the relevant box on the *MERF*.

If the program has not provided a signed copy of the *Infant Sleep Acknowledgment Form* for required item 5A-928, the assessor will request the *Infant Sleep Acknowledgment Form* on the MERF. A copy of this form is included in the *Administrator Information Packet*. See detailed instructions for this form in the *Infant Sleep Equipment Protocol*. If this form is requested, check the relevant box on the MERF.

Emerging Items. As with other items, if evidence is missing for an emerging item (e.g., empty folders or files), list it on the MERF. List emerging items on the MERF even if the program has verbally stated they choose not to address them. Explain that you will still list the emerging items on the MERF, and they can choose to ignore those items on the MERF. However, if the program states in writing in the Program Portfolio that they do not meet an emerging item, do not list the item on the MERF; consider the statement to be evidence that the item is not met and rate it “No” on PP.

Scheduling the MERF. There is a strict scheduling protocol with respect to the *MERF*. Schedule the presentation of the *MERF* after completion of the *Program Portfolio Assessment Tool*. Submit the completed *MERF* to the program administrator about 2 hours before scheduled completion of the accreditation visit. Note the time the *MERF* was given on your schedule. Tell the program administrator what time you need to receive the returned evidence. Also write the return time on the *MERF*.

Allow the program administrator and any assistants he or she chooses *at least one hour, and no more than 1.5 hours*, to submit and label any missing evidence. Program administrators may make one or more copies of the *MERF* to assist them with their task. During the hour, give the program administrator (and his or her assistants) access to the Program Portfolio. The assessor may rate Class Portfolios, do an observation, or take a break during this time.

At the conclusion of about one hour the assessor should receive compiled and labeled additional evidence from the program administrator. If the program administrator took the original copy of the *MERF*, it must be returned to the assessor(s) at this time. Note the time evidence was returned to you on the visit schedule.

Reviewing Additional Evidence. Review the additional evidence and complete all ratings on tools. If the administrator was directed to review the *License-Exempt Acknowledgment Form* or the *Infant Sleep Acknowledgment Form* along with the *MERF* and chooses to execute it, the administrator may do so by signing a digital copy of the form on the assessor's tablet. If evidence for any required item is still missing, the assessor should finalize the *RIRF-1* at this time. The entire review generally takes no more than 15 minutes, but take as much time as necessary. During this time, if the program staff submits additional evidence, the assessor will accept it and review it. No further evidence will be accepted and rated after the review period is completed.

The assessor(s) should then proceed directly to the Closing Meeting, scheduled for the last half hour of the accreditation visit. The assessor(s) and the program administrator verify on the *Visit Signature Form* at the end of the Closing Meeting that the *MERF* protocol was followed.

### **First Aid/CPR Acknowledgment Form**

The *First Aid/CPR Acknowledgment Form* is an optional form that provides a means of addressing failure of **required item 5A-811** (pediatric first aid and pediatric CPR training among teaching staff). It is included in the *Administrator Information Packet* that the administrator receives prior to the visit. The *First Aid/CPR Acknowledgment Form* is a type of corrective action requested on the *RIRF-1*. If needed, refer the administrator to the *First Aid/CPR Acknowledgment Form* at the Closing Meeting when the *RIRF-1* is reviewed, and include a digital copy of this form with the Visit Completion Packet (see below). The administrator must sign and return the *First Aid/CPR Acknowledgment Form* at a later date, when all conditions have been met.

### **Safety Concerns Report Form (SCRF)**

*(Schedule about 10 minutes to compile; 5 minutes to review [in Closing Meeting])*

This form is included in the *Administrator Information Packet* and the *Forms Document*. The *Safety Concerns Report Form* is a method for communicating to the program any observed safety concerns related to physical environment factors (building, grounds, equipment) both indoors and outdoors. The *SCRF* includes categories of safety issues that create a risk of harm to children's health or safety, and that may be corrected by the program within a short time frame. The kinds of safety concerns included on this form do NOT refer to NAEYC required items, which are reported on the *RIRF-1* (see below). Safety concerns caused by the *actions* of staff, children, or other present adults are not reported on this form.

An assessor may notice safety concerns at any time during the visit, whether or not he or she is conducting a formal class or program observation at the time. The assessor(s) may write the safety concerns on the *SCRF* as they occur, or upon completing a class observation or other visit task. If safety concerns are noted during an observation they may also be used to rate items as "not met" on the Observation tools.

If there are no safety concerns noted, check the box at the top of the form.

If more than one assessor is conducting the site visit, all assessors should compile safety concerns on working copies of the *SCRF* form. (i.e., each assessor makes a copy of the *Safety Concerns Report Form* on his/her tablet and fills it out throughout the visit.) The lead assessor should then combine all concerns onto one final copy of the *SCRF* prior to the Closing Meeting.

At the Closing Meeting, review the contents of the report with the administrator. Remind the administrator that once the form is presented, no further documentation or follow-up by the program will be accepted as further evidence related to formal visit ratings. The ratings are done; this form is advisory only. Avoid lengthy discussion of what is noted, and make it clear if necessary that you cannot change visit ratings at this time.

On the *Visit Signature Form* the assessor verifies that the form was presented and reviewed. By signing the program administrator agrees to take immediate corrective action to address the safety concerns noted, or to communicate the safety concerns to others who have the authority to take action.

### Required Item Report Form (RIRF-1)

*(Schedule about 15 minutes to compile; 5 minutes to review [in Closing Meeting])*

This form is included in the *Administrator Information Packet* and the *Forms Document*. A blank copy of *RIRF-1* is reviewed with the program administrator during the Orientation Meeting.

The assessor fully documents the possible failure of required items on the *RIRF-1*. This form is also used to document that there were no failures of required items. Compile the *RIRF-1* just before the Closing Meeting, after the *MERF* has been given to the program administrator, received back, reviewed and rated. The completed *RIRF-1* is reviewed with the program administrator at the Closing Meeting.

**Section 1:** *Something must be checked in this section!* The assessor must indicate whether all required items were met, or whether one or more required items had possible failure(s). For each possibly failed item, note the number of times that item is possibly failed. For each required item, the “Actions” column prompts for additional information or action.

**Section 2** documents any possible failures of required items based on Program Portfolio evidence, and contains instructions regarding corrective actions the program must take.

**Section 3** must be completed when there is a possible failure of a required item based on Observation. Describe the observed incident as completely and legibly as possible. It is important to convey the details requested about the scope and severity of the incident—*where* it happened, *how long* it lasted, *which* and *how many* children or staff were involved, *how* the incident ended (e.g., staff solved it or assessor called their attention to a problem), etc. Some other tips to keep in mind when writing up an incident:

- Use proper nouns to describe teachers and children. This allows the program to provide detailed follow-up with the staff regarding any possible failures of observable required items.
- Use full sentences, not bullet points or short phrases that can confuse the narrative.
- State observed details. Avoid judgmental language.
- Avoid extraneous information.
- If a diagram was included on the CO Notes page, it needs to be transferred to the *Required Item Diagram Form*.

Section 3 of *RIRF-1* has a data field “Copy 1 of \_\_\_\_”. If there are multiple possible failures of required items based on observed incidents, an additional copy of *RIRF-1* Section 3 is found in a separate form titled *RIRF-1 Additional\_x\_of\_x*, which the assessor should have stored on his or her tablet. Complete as many copies of this form as needed, and send each copy of this form to the administrator after the visit. Indicate in each copy of Section 3 how many total copies have been completed.

**Section 4** of *RIRF-1* provides directions to the program administrator regarding follow-up.

On the *Visit Signature Form* the assessor verifies that the *RIRF-1* was presented and reviewed regardless of whether or not there were possible failures of required items.

### **Required Item Response Form (RIRF-2)**

*(Optional; allow 5 minutes to review in Closing Meeting)*

The RIRF-2 is a form completed by the program following the site visit, as part of a program's response to certain possibly failed required items reported on the RIRF-1. It is included in the *Administrator Information Packet* (sent before the visit) and reviewed with the program administrator during the Orientation Meeting.

If any relevant required item failures are observed during the visit, this form should be reviewed again in the Closing Meeting, and a copy must be sent to the program with the *Visit Completion Packet*. RIRF-2 allows the program to provide a detailed account of observed incidents related to possible failure of a required item. Detailed directions for the administrator are included on the RIRF-2.

As noted above for RIRF-1, it is possible that multiple incidents occurred. If more than one incident must be responded to, a separate form titled *RIRF-2 Additional\_x\_of\_x* is available to the assessor and must be sent to the program after the visit.

The *Visit Signature Form* indicates that the *RIRF-2* was reviewed in the Closing Meeting if applicable.

### **Required Item Diagram Form (RIDF)**

*(Optional; allow 5 minutes to review in Closing Meeting)*

The RIDF is included in the *Administrator Information Packet* (sent before the visit) and reviewed with the program administrator during the Orientation Meeting. This is a paper form, used optionally only when:

- There is a possibly failed required item, and
- The possible item failure was *observed*, not document-related, and
- Description of the possible item failure would be assisted by providing a diagram of the relevant space (classroom, playground, outdoor learning environment, infant sleep room).

Assessors may use the *RIDF* during or immediately following an observation to draw space layouts, including positioning of children and staff if relevant. Assessors are not *required* to complete the *RIDF*; but if used, this form must be reviewed with the program administrator during the Closing Meeting. The program administrator must be given the opportunity to make a copy of this (paper) form during the Closing Meeting. It should also be sent to the administrator digitally after the visit within (or as part of) the *Visit Completion Packet*.

### **Infant Sleep Equipment Acknowledgment Form**

*(If Applicable; allow 5 minutes to review in closing meeting)*

Prior to a site visit, programs serving infants may sign the *Infant Sleep Equipment Acknowledgment Form* and include it in the Program Portfolio for the assessor review during the visit. The Assessor will make a copy of the form to return to NAEYC.

If the Assessor does not see a signed copy of this form in the Program Portfolio, then the Assessor will request on the *Missing Evidence Request Form* (MERF) that the administrator sign either a printed or electronic acknowledgement form during the visit. If the administrator chooses not to sign the Acknowledgment Form during the visit, the Assessor will indicate that Item 5A-928 may be possibly failed on the *Required Item Report Form* (RIRF-1).

### **License-Exempt Acknowledgment Form**

*(If Applicable; allow 5 minutes to review in closing meeting)*

The *License-Exempt Acknowledgment Form* is an optional form that provides a means of addressing incomplete evidence regarding required item 10B-1322, which relates to a program's state licensing requirements. However, it is used only if evidence for 10B-1322 is found to be missing or incomplete when the *Program Portfolio* is reviewed. The program is assessed on the documentary evidence for 10B-1322 by completing the *License to Operate Worksheet*. When the evidence compiled on this worksheet shows that the program does not hold a valid and current license, assessors must list the missing evidence on the *MERF*.

Temporary, Provisional, Probationary or Expired Licenses: If the license is in a temporary, provisional, probationary or expired status, put 10B-1322 on the *MERF* and request a current, valid license. If the program produces a current and valid license, rate 10B-1322 'Yes' in the Program Portfolio. If the program does not produce a current and valid license after the *MERF*, rate 10B-1322 as 'No' in the Program Portfolio and indicate 10B-1322 as possibly not met on the *RIRF-1*.

License Exempt Programs: If a program is license-exempt, indicate that additional documentation is needed for item 10B-1322 on the *MERF* and give the responsible person the *License-Exempt Acknowledgment Form* at the time of the *MERF*. If the program executes and returns the form, 10B-1322 is rated 'Yes' in the Program Portfolio and is not included on the *RIRF-1*. If the program does not execute the form on the day of the visit, rate 10B-1322 as 'No' in the Program Portfolio and indicate 10B-1322 as possibly not met on the *RIRF-1*. The program may choose to submit a signed *License-Exempt Acknowledgment Form* up to five business days after the visit. See the *License-Exempt Acknowledgment Form* for further instruction.

## Visit Signature Form

*(Allow about 5 minutes to review and execute in Closing Meeting)*

*Visit Signature Form* is included in the *Forms Document*. This form allows for signatures and affirmations of many elements of the visit process by both the assessor and the program administrator. Signatures are executed digitally. The program administrator and all assessors present must sign this form. Each element being endorsed has its own checkbox. If any signer does not agree that a specific element of protocol was followed, the checkbox should be left unchecked. If a box is unchecked, a comment note must be added to the form describing the nature of the disagreement.

## “Flattening”: Digital Security regarding Forms and Signatures

All *forms* (not tools or worksheets, just forms!) completed during the visit must be secured to ensure that no party (assessor, program, or NAEYC) is able to edit the form (including signatures) after the visit. Therefore assessors are required to 'flatten' (i.e. digitally lock) all forms used before sending them to the program or NAEYC.

## 8. Closing Meeting with the Program Administrator

*(Schedule 30 minutes)*

The Closing Meeting is an opportunity for the assessors and program administrator to verify that the assessment was conducted as outlined in this protocol and on the *Process Verification Form*. Assessor(s) and program administrators review several forms in the closing meeting, then execute the *Visit Signature Form* acknowledging the review and affirming that procedures were followed. Remind the program administrator that assessors are not able to discuss any of the results of the assessment at the closing meeting.

### Forms to Review in the Closing Meeting

Specifically, assessors must review the following forms. Digital forms are reviewed by showing the completed digital versions on the tablet to the program administrator.

Accreditation Visit Schedule, annotated during the visit to reflect any changes in the schedule as actually executed. The assessor should take some time reviewing the schedule, noting that sufficient time was taken for each assessment task, noting when additional time was needed for tasks (for example, additional 10 minutes for observations), and noting where the original schedule was altered, and why. It is very important that the program administrator be able to understand and confirm that protocol was followed with respect to how much time was allotted to tasks.

The assessor(s) and program administrator sign the *Visit Signature Form* to indicate that the schedule was reviewed. The administrator is NOT agreeing by signing that everything in the schedule is correct. He or she may decide upon later review that something is not right. However, the administrator is acknowledging receipt of the schedule, with amendments to reflect its actual execution.

Required Item Report Form is reviewed regardless of whether or not any of the items were observed to not be met. Also review the Required Item Diagram Form, if used to document an observed possible failure of a required item. If there was a possible failure of observed Required Items, review the *RIRF-2*.

Missing Evidence Request Form, regardless of whether or not any documentation was requested.

Safety Concerns Report Form, regardless of whether or not any safety concerns were noted.

Process Verification Form.

NAEYC Accreditation Decisions and Next Steps handout. This handout was sent to the program administrator as part of the *Administrator Information Packet*. Assessors should briefly summarize the main points in the handout, and urge the administrator to review it carefully after the visit has been completed. The handout will include a link to Survey Monkey, where the administrator can complete the *Administrator Evaluation of the Accreditation Visit*.

Visit Signature Form. The administrator and the assessor(s) read each statement and check the boxes by the statements that they agree with. The administrator and assessor(s) sign and date the signature form.

## Other Tasks

Record the Closing Meeting completion time on the *Accreditation Visit Schedule*.

Inform the program administrator that copies of all completed forms will be available within 2 business days of visit completion. However, at this time offer the program administrator an opportunity to make photocopies of the schedule and any other paper documents.

Finally, tell the program administrator that upon completion of the visit no further alterations to the scoring tools will be made. Thank the administrator and his or her staff for their accommodation of your site visit, and for all their hard work on behalf of program quality improvement.

## 9. Renewal Visits with School-Age Component (AV-SAC)

Detailed below are the specific exceptions to the Accreditation Visit Protocol that occur during an NAEYC accreditation visit for programs seeking to renew their accreditation and participate in the School-Age accreditation pilot program. The Renewal accreditation visit and the School-Age pilot visit are combined into a single site visit. However, there are 2 types of these combined visits:

1. AV-SAC Initial: The program is renewing their accreditation for age categories that may include infant through kindergarten, but they are seeking first-time accreditation for one or more school-age classes.
2. AV-SAC Renewal: The program already has one or more school-age classes accredited through our pilot program, and are renewing their accreditation for age categories that may include Infants through school-age.

All previously detailed instructions in this protocol are to be adhered to during these specific types of visits, with the following exceptions:

1. AV-SAC Initial: The school-age class(s) are evaluated differently than classes in all other age categories; for school-age classes conduct an observation, but do not rate a class portfolio.
2. AV-SAC Renewal: The school-age class(s) are evaluated like classes in all other age categories; conduct an observation, and rate a class portfolio.
3. Process Verification Form. When completing the *Process Verification Form* during the Orientation Meeting, assessors must complete table titled "School-Age Visit" in addition to the table for "Accreditation Visit".

## 10. Post-Visit Procedures-AV

Following an accreditation visit the assessor has the following tasks:

- Send copies of completed accreditation visit process forms to the program administrator
- Send copies of all completed accreditation visit documents (forms, worksheets, tools, surveys, etc.) to NAEYC
- Back up all digital documents;
- Complete an Assessor Evaluation of the Site Visit
- Complete financial accounting for the visit

### Accreditation Visit Completion Packet (VCP)

The assessor must send digital copies of all completed visit forms to the program within 2 business days of the site visit. These are attached to an email; assessors have access to an email template for this purpose. The VCP email includes

- a list of all attached digital documents,
- a reminder of any paper documents the program was permitted to copy prior to the end of the visit,
- specific instructions for any follow-up if needed (e.g., reporting staff changes, responding to possible failure of a required item),
- a link to the *Administrator Evaluation of the Site Visit*. Programs are asked to complete this survey within 5 business days of receipt of the VCP.

### Post-Visit Protocol

Further instructions and information on the specifics of the other post-visit procedures are available to assessors in the *Post-Visit Protocol & Procedures*.