ASSOCIATION FOR EXPERIENTIAL EDUCATION ACCREDITATION PROGRAM

REVIEWER PROCEDURES HANDBOOK

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I. The Accreditation Program

About AEE Accreditation

In 1994, the Association for Experiential Education (AEE) responded to a need by developing the most comprehensive standards for common practices in the industry, becoming the nation's first recognized accreditation process focusing on experiential adventure programming. Since then, the AEE Accreditation Programs standards-based evaluation process by independent reviewers has become the industry-accepted level of professional evaluation for experiential and adventure programs.

The Association for Experiential Education Accreditation Program is the responsibility of the Director of Standards Development & Accreditation (the Director) and the Accreditation Council (the Council).

The purpose of the Accreditation Program is to advance the professional practices of organizations offering adventure-based experiential education and outdoor behavioral healthcare.

Attaining accredited status through the AEE Accreditation Program is solid evidence of an organization's commitment to quality and safety, belief in professional standards, and allocation of resources toward continued excellence and improvement. Programs that achieve AEE accredited status report they are confident that they meet or exceed recognized industry standards.
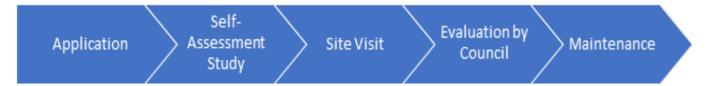
Goals of the AEE Accreditation Program

The primary goals of the AEE Accreditation Program are to:
1. Set standards of practice.
2. Provide education in furtherance of our purpose.
3. Assess organizations for quality assurance.

Overview of AEE Accreditation Process

The accreditation process is designed and managed by the Director and the Accreditation Council, and includes five steps:

1. The Accreditation process begins with the program **application**.

2. Once eligibility is determined and the application is accepted, the program is assigned a Council Liaison. The Council Liaison supports the program in documenting an internal review in the form of a '**Self-Assessment Study**' (SAS).
   The program must submit a completed SAS to their Council Liaison for approval at least 90 days before a site visit may be scheduled, and the Council Liaison must review the SAS within 21 days of receipt of formal submission.

3. Once the SAS is approved, a review team is selected to conduct an external review by way of a **site visit**. The site visit process is normally completed within 6 months of approval of the SAS. The review team composes a *Site Visit Report* (identifying areas of compliance and non-compliance), which must be submitted to the Council Liaison for approval within 14 days of completion of the site visit. Within 30 days of the site visit the program will receive the final *Site Visit Report*, after which time they have 60 days to submit their *Program Response to Site Visit Report. The Program Response addresses the findings of the review team by offering corrective actions for unmet standards, responses to other observations, and/or additional relevant information. Occasionally a program may disagree with one or more of the findings of the review team and are invited to address these disagreements in their written response.*

4. Once the program has remedied any areas of non-compliance, the Council Liaison makes a recommendation to the Accreditation Council and they **vote on the program's accreditation** at the next scheduled deliberation.

5. Following initial accreditation, the program's ongoing accreditation is contingent on satisfactory submission and acceptance of Annual Reports and payment of annual fees.

II. Reviewer Roles and Responsibilities

Accreditation Program Reviewers, through the use of program site visits, provide the Council Liaison and Director with a clear understanding of the organization and its level of compliance with AEE accreditation standards at the time of the site visit. Members of the review team are not consultants and do not make recommendations to Council or the organization under review. The review team is formed based on the availability of appropriate volunteer reviewers for the setting, activities, and clients.

There are three reviewer roles that may comprise review teams including Lead Reviewers, Reviewers and Trainees. Lead Reviewers manage the site visit on behalf of the Accreditation Council. Reviewers work in conjunction with Lead Reviewers to carry out the site visit. Trainees observe and engage in the site visit in a training capacity at the discretion of the Lead Reviewer at a level appropriate to their competence.

All reviewers are ambassadors of the AEE Accreditation Program. They must be supportive of everyone they interact with during a site visit. It is essential that reviewers base their opinions of program practices on the AEE accreditation standards, not the practices used at their home institutions. Being reviewed by outsiders has the potential to be stressful to everyone at a program being reviewed. Reviewers should comport themselves in a manner that sets a professional and supportive tone during the entire review process. (see *Reviewer Ethical Guidelines and Agreement.*)

Trainees

A trainee is an individual who meets the eligibility criteria of a Reviewer but who has not yet participated in an Accreditation Site Visit. In order to become a Trainee, an individual needs to submit an application and be approved by the Director. The trainee receives direct support and supervision from the Lead Reviewer and will not be assigned tasks on the site visit beyond their expertise.

Reviewers

Reviewer Qualifications
- Possess significant experience, enough to have reliable professional judgement and to be respected as a reviewer by Accreditation Council and the organization applying for accreditation.

- Possess an identified area of expertise in the field of adventure-based experiential education or related discipline.
- Working knowledge of the relevant *Manual of Accreditation Standards for Adventure Programs* and/or *Manual of Accreditation Standards for Outdoor Behavioral Healthcare Programs*.
- Successful completion of an accreditation program reviewer training or be willing to apprentice under an approved Lead Reviewer.
- Ability to work constructively as a member of a review team.
- Willingness to volunteer the time needed to serve on a review team.
- Ability to model AEE's ethical guidelines and represent AEE with integrity and professionalism.

Note: Program Reviewers are most commonly members of AEE. Non-members considered experts in their fields may be used at the discretion of the Director.

Invitation

On occasion, individuals are invited to be reviewers in order to promote partnerships with other credentialing organizations (e.g., American Camp Association, Association for Challenge Course Technology, etc.) or because they possess a particular area of expertise.

Application
- All reviewers must complete an application and sign the conflict of interest statement that is part of the Reviewer Application. The application can be sourced by emailing the Director or from the AEE website.
- The completed forms, along with a current resume, must be submitted to the Director.
- Applicants are assessed against specific technical skill sets (i.e. canoeing, challenge course, climbing), specific experience or training related to setting (i.e. wilderness or urban), client experience (i.e. adolescent or adult), professional focus (i.e. education or therapeutic), and/or years of experience.
- Program Reviewers are approved by the Director.

Responsibilities
- Reviewer responsibilities are outlined in Sections III, "Review Team Tasks."

Time Commitment
- Reviewers must allow enough time to become thoroughly familiar with the program's SAS.
- Reviews take approximately 4-5 days (includes travel time).

Accreditation Program Reviewer Training

See Section VI. Review Training (below).

Benefits
- Professional development opportunity to observe other programs and organizations in the fields of adventure programming and outdoor behavioral healthcare.
- Reviewer travel expenses are covered.
- Opportunity to work with colleagues from different organizations.
- Gain a clearer understanding of industry standards.
- Stay on top of emerging issues in the industry.

Lead Reviewers

Eligibility
Lead Reviewers must meet the selection criteria for a reviewer, have experience as a reviewer on a minimum of two site visits and be recommended by a current Lead Reviewer or Director. Lead Reviewers are approved by the Director.

Responsibilities
Lead Reviewers responsibilities are outlined in Section III, "Lead Reviewer Tasks."

Lead Reviewer Training
See Section VI. Review Training (below).

III. The Site Visit Process

For an overview of the site visit process, also see the *Conducting an AEE Accreditation Review* form and the *Lead Reviewer Checklist*. These documents and other resources reside in the AEE Google Drive Folder "AEE Reviewer Resources".

The site visit is scheduled after the Council Liaison has approved the organization's SAS. The Director works with the organization to find appropriate dates when essential activities can be observed, and key personnel and clients can be interviewed. The Lead Reviewer usually works with the organization to design the exact schedule of the site visit.

The size of the review team is determined by the Director in consultation with the organization's Council Liaison and varies based on a number of factors including whether it is at a large or small organization, whether this is an initial review, and also if a reviewer training is incorporated.

The review team is responsible for:
1. Collecting data pertaining to all appropriate sections of the *Manual of Accreditation Standards for Adventure Programs* or the *Manual of Accreditation Standards for Outdoor Behavioral Health Organizations.*
2. Verifying standards compliance,
3. Reporting findings to the Director and the Council Liaison.
4. After the Site Visit Report is accepted by AEE, all notes that reviewers took during the site visit are deleted.

Prior to the Site Visit

The SAS is a thorough internal review of administrative systems, operations, and programs. Its purpose is to demonstrate compliance with applicable accreditation standards. Prior to the site visit, review team members carry out the following:

Lead Reviewer Tasks
1. Discuss concerns the Council Liaison might have about standards compliance, based on their review of the application materials and the SAS.
2. Determine review team member preferences, skills and areas of expertise and delegate tasks accordingly.
3. Coordinate and confirm dates and travel plans with the organization, the review team and the Director.
4. Develop a site visit schedule with the organization and provide a copy to the Council Liaison and Director.

5. Coordinate and confirm logistical details (i.e. work area, access to office equipment, accommodation, transportation, etc.) with the organization.
6. Ensure that members of the review team have reviewed the application materials prior to the site visit and remind review team members to evaluate the SAS standard by standard and generate a list of topics, data needs and questions based on the initial review.
7. Facilitate a pre-site visit video conference meeting to orient the review team to the upcoming site visit and coordinate roles and logistics.
8. Discuss training objectives and needs with Trainees.

Review Team Tasks
1. Read the SAS thoroughly to get an overall sense of the organization (i.e. scope, mission, goals, activities, areas of operation, client profiles, etc.).
2. If this is a continuing accreditation, read the last *Site Visit Report* and the organization's response to that report.
3. Interpret compliance with the standards based on the evidence provided in the SAS.
4. Identify on-site actions based on questions and concerns raised in the reading of the SAS (i.e. who should be seen, what should be seen, what questions should be asked).
5. Communicate questions and concerns about the SAS to the Lead Reviewer. If the question needs further clarification, the Council Liaison is the best person to ask.
6. Coordinate travel arrangements, accommodation, and food needs with the Lead Reviewer and Director.

Initial Meeting

The site visit requires excellent coordination between review team members, long hours, and thorough preparation. The review team will meet upon arrival to review notes, confirm roles/responsibilities, and finalize the schedule. Normally, the review team will also meet with organization staff in an informal setting to answer any questions about the review process and set the tone for the review.

Lead Reviewer Tasks
1. Lead the initial meeting with the review team to review notes, confirm responsibilities, and finalize schedule.
2. Lead the initial meeting with the organization to set the tone for the review, coordinate logistics (i.e., schedule, time frame, etc.), and answer questions.

Review Team Tasks

1. Meet with team members to review notes, confirm responsibilities, and finalize schedule.
2. Participate in the initial meetings.

Data Collection

Data collection involves interviews, observations, and a review of documents, facilities, and equipment for the purpose of verifying compliance with standards The majority of data collection needs are identified prior to the site visit through a thorough analysis of the SAS. However, review team members will need to acquire additional data during the site visit, including evidence that stated policies and procedures are being followed.

Staff at all levels of the organization may be interviewed. Staff interviewed may include representatives of associated programs, services, or functions, and advisory or support group members such as Risk Management Committees or Board of Directors. While face-to-face interviews are preferred, some interviews may be conducted via phone/computer. Participants may be interviewed individually or in small groups to verify standard compliance from a variety of sources. Participant interviews provide a useful opportunity to triangulate data.

Reviewers need to observe some programming in action. While it is impractical to observe all activities, selections should be based on factors such as areas in which the organization specializes (so called "signature activities"), activities that appear to have higher rates of incidents or accidents, high-risk activities, new activities, and activities that warranted comment or were cause for past concerns in previous reports, reviews, evaluations, or inspections.

The review team will review documents and files that are noted in the SAS as available on site or for which concerns were raised. Facilities and support services such as administrative oversight and procedures, transportation, food service, maintenance, and health services may be examined in an appropriate manner.

Many review teams choose to use the *Reviewer Notes Template* to record their data collection.

Lead Reviewer Tasks
1. Coordinate review team member tasks and responsibilities for data collection.
2. Assist review team members to interpret and review appropriate evidence of compliance for relevant standards.

3. Communicate with organization staff throughout the site visit about logistics and needs of the review team.
4. Communicate with the Liaison if there are issues to address or any clarification needed.
5. Prior to the exit interview have a meeting with the AEE contact at organization to answer any last-minute questions and provide any missing information.

Review Team Tasks
1. Engage in data collection through interviews, document review, observation of programming, and other methods.
2. Communicate with review team related to findings.

Site Visit Report

The purpose of the *Site Visit Report* is to communicate review team findings to the organization and to the Council Liaison. The report has a narrative section and a standards section. The narrative section includes an introduction, a summary of review team findings, and other observations. The standards section lists all standards reviewed with "met," "unmet," or "not applicable" findings.

The *Site Visit Report* contains instructions on how the report is to be written that are deleted from the report before it is submitted to the Liaison and the Director for review and final approval. The opinions of the review team beyond whether a standard is met, or not met, are not to be documented in Section B of the report or shared with the organization during the review.

Remember: AEE does not prescribe how standards should be met; however, the organization must be able to justify how it chooses to meet a standard.

After the site visit is completed the draft of the *Site Visit Report* is sent by the Lead Reviewer to the Council Liaison and the Director for review and comment. After suggested edits are incorporated into the *Site Visit Report*, it is sent to the organization by the Director.

Lead Reviewer Tasks
1. Facilitate the writing of the draft *Site Visit Report* by spending a portion of each day with the entire review team comparing findings and drafting sections of the written report.
2. Ensure that observations of unmet standards are clear and do not stray into recommendations.

3. Compile a summary of the draft report for use in the exit interview (do not provide the organization with a draft of the *Site Visit Report*).
4. Revise the draft *Site Visit Report* as appropriate after the exit interview.
5. Submit the final draft version of the *Site Visit Report* to the Director and the Council Liaison within fourteen (14) days after the site visit. The report will be reviewed, and if there are suggested edits the Lead Reviewer will be contacted.

Review Team Tasks

1. Spend a portion of each day comparing findings and drafting sections of the *Site Visit Report*.
2. Complete a draft of the *Site Visit Report* prior to the exit interview.

Exit Interview

Prior to the exit interview, the review team should meet to discuss the specific conditions and process of the exit interview. Feedback specifically for an administrator or on potentially sensitive issues should take place prior to the exit interview with appropriate personnel to avoid surprises. The exit interview should focus on the observations of the review team and the facts.

During the exit interview the review team reports on "preliminary" findings and the findings should be framed as such. The written report contains the definitive list of standards met and not met. The exit interview is usually facilitated by the Lead Reviewer and takes place at the conclusion of the site visit with appropriate personnel from the organization. The exit interview follows the format of the draft *Site Visit Report*. It provides an opportunity to discuss preliminary findings of the review team, clarify remaining questions, correct factual errors, and describe the next steps in the accreditation process.

Differences of opinion between the organization and the review team should be addressed by the organization in the *Program Response to Site Visit Report*. The review team members do not offer opinions or make recommendations regarding how standards should be met during the exit interview. The Council will make the decision to confer accreditation based on the application material and the Liaison Report.

Lead Reviewer Tasks

1. Facilitate a meeting of the review team to prepare the exit interview.
2. Facilitate the pre-meeting with the organizations CEO/director to discuss any specific feedback or potentially sensitive issues.

3. Facilitate the exit interview based on the sections of the *Site Visit Report*. Be sure to state these are initial findings. The final written report will be more evolved than the exit interview. Include the following topics:
   a. a general overview of the site visit process,
   b. strengths of the organization,
   c. unmet standards,
   d. other observations or concerns.
4. Ask review team members to contribute as appropriate.

Review Team Tasks
1. Assist in planning the exit interview discussion.
2. Participate in the exit interview, contributing as decided by the review team.
3. Maintain role as a member of an accreditation review team (do not offer personal opinions that may be interpreted as directives from AEE).

Final Review Team Meeting

In most cases, the review team will meet before leaving the site to discuss findings, agree upon the content of the final draft *Site Visit Report*, delegate tasks that remain to be done, set deadlines, and sign the signature page of the report. At this time, it may be appropriate to complete evaluation procedures (see below).

The Director will ask review team members to share formative feedback and complete the *Reviewer Evaluation of the Site Visit* form and the *Accreditation Reviewer to Reviewer Feedback* form for each member of the review team. Data is used to improve the AEE Accreditation Program.

Lead Reviewer Tasks
1. Update the draft *Site Visit Report* if required based on the exit interview.
2. Conduct a general evaluation of the site visit.
3. Provide members of the review team with hard or electronic copies of the *Reviewer Evaluation of the Site Visit* form and the *Accreditation Reviewer to Reviewer Feedback* form to be submitted to the Director and the Council Liaison within 14 days of the site visit.
4. Review procedures for reimbursement of expenses and then submit them on the AEE *Accreditation Expense Reimbursement Form* with receipts via email to the Director.

Review Team Tasks
1. Contribute clarifying information as requested by the Lead Reviewer or the Council Liaison.

2. Complete the *Reviewer Evaluation of the Site Visit* form and the *Accreditation Reviewer to Reviewer Feedback* form.
3. Submit expenses on the AEE *Accreditation Expense Reimbursement Form* with receipts via email to the Director.

IV. Reviewer Expenses and Requests for Reimbursement

Volunteer reviewers are integral to the accreditation process and should not incur expenses when serving as a reviewer for AEE. Reviewers expenses are billed by AEE to the program being accredited, and it is helpful and appreciated by programs when expenses are kept to a minimum. All reasonable expenses incurred by reviewers during a site visit will be reimbursed by the organization via AEE. Reasonable expenses include travel, food, lodging, photocopies, postage, and other incidental expenses directly related to the site visit.

As the organization being reviewed is paying for the expense of a review, AEE has a commitment to try to keep the cost as low as is reasonable. Reviewers in the past have found more economical lodging such as utilizing Airbnb. AEE may need to determine if expenses are an unreasonable burden on the organization seeking accreditation. *If the expense is deemed unreasonable, they will not be reimbursed.*

The following are AEE Reviewer expense guidelines:
1. Reviewers make their own travel arrangements to and from the review.
2. Book your flight at least 21 days prior to the review if traveling by air (to get the lowest fare). **Do not book your flight until the dates of the site visit are confirmed with the Director**.
3. Coordinate your airport arrival and departure time with the Lead Reviewer so you can all travel together to/from the review site, if possible.
4. The Lead Reviewer will check with the organization about what the organization may be able to provide. General guidelines for pricing are included below. If it is anticipated that expenses will exceed the limits listed below, consult the Director for approval.
   - Airfare: Up to $500
   - Car Rental: Economy. Check first with the host organization if a rental car is necessary – the host organization may arrange transportation to pick you up, or you may be able to use a shuttle service to reduce the cost.
   - Mileage: $0.56/mile
   - Lodging (shared accommodations when appropriate): Up to $130/night.
   - Food: $49/day (not including gratuities);
     ➔ Breakfast: $12; Lunch: $13; Dinner: $24
     ➔ The separate amounts for breakfast, lunch and dinner listed are provided should you need to deduct meals from your trip. For example, eating at home before your travel begins, or where meals are provided by the host organization

      ➜ Tip not to exceed 20%
      ➜ Alcoholic beverages will not be reimbursed

5. Submit your expenses electronically using the AEE *Accreditation Expense Reimbursement Form* **with receipts** within 7 business days after the review. AEE needs receipts for our financial audits. If you do not have a receipt, you will not be able to be reimbursed.

6. If you have any questions about expenses, please check with the Director before you incur them.

V. Conflict of Interest

Definition: to derive personal or professional benefit from decisions made in your accreditation capacity.

AEE staff and volunteers associated with the Accreditation Program, including Council members and reviewers, act as agents of AEE with an interest in enriching lives through experiential education. The Accreditation program has a further interest in advancing the professional practices of organizations offering adventure-based experiential education and outdoor behavioral healthcare through helping them meet accreditation standards. Our shared interest is to help programs meet standards; any deviation from this interest should be disclosed and discussed with the Director or Liaison for guidance. The foundational ethics in such work are both fairness and transparency. As such, situations in which a conflict of interest may occur (or potentially undermines fairness and transparency) must be reported to the Director.

In cases where a conflict of interest cannot be avoided, reviewers will excuse themselves from related accreditation processes and deliberations. The Director will determine if there is a conflict of interest and, if necessary, consult the Accreditation Council. The Director will remove any reviewer who has compromised the integrity of the Accreditation Program.

In order to avoid situations that could be perceived as a conflict of interest, volunteers will:

1. Disclose to AEE any current or prior relationships with an organization seeking initial or continuing accreditation;

2. Avoid developing any type of relationship with organizations engaged in the accreditation process that could impair professional judgment or negatively affect the Accreditation Program;

3. Decline to serve as a reviewer or Council Liaison for organizations to which they have served in the role of a paid consultant or employee within the previous 12 months;

4. Refrain from serving as a paid consultant or employee to an organization for a period of 12 months after the AEE accreditation is finalized.

A full summary of AEE Ethical Guidelines can be found on the *Ethical Guidelines and Agreement* document.

VI. Reviewer Training

A variety of methods are used to train reviewers. Some years one method might be utilized more than others.

Online Training

Online trainings are being developed and soon will be available to all reviewers (both new and lead reviewers). Contact the Director to access these resources.

Reviewer Training Workshops

Workshops may be conducted at AEE conferences.

Reviewer Training Symposium

Symposiums may be conducted in conjunction with selected continuing accreditation site visits at the discretion of the Director, with approval of the Accreditation Council and the host organization. The reviewer training team functions separately and in consultation with the review team to ensure the integrity of the site visit. Completion of training does not guarantee that an applicant's Reviewer Application will be approved or that the applicant will be asked to be a member of a review team in the future.

Apprenticeship

Apprenticeship reviewer training may be conducted in conjunction with site visits and is available on a limited basis according to the number and nature of site visits

available in a given period and the availability of Lead Reviewers approved as reviewer trainers. There will normally be only one apprentice on a Review Team.

University students in relevant degree programs may be approved for reviewer apprentice training by the Director if the Lead Reviewer agrees to supervise the apprentice in compliance with responsibilities set forth in the Accreditation Program Reviewer Handbook.

The apprentice is responsible for:
1. Submitting the Reviewer Application to AEE 30 days prior to the site visit, thereby agreeing to the conditions set forth in the current Accreditation Program Reviewer Handbook,
2. Reading training materials prior to the site visit,
3. Paying his or her expenses associated with the site visit as negotiated between Accreditation Program staff and the host organization.

The Director is responsible for:
1. Approving the Reviewer Application,
2. Providing the apprentice with training materials prior to the site visit, including but not limited to, the current Accreditation Program Manual and related forms, Accreditation Reviewer Training materials, and the current manual of Accreditation Standards for Adventure-based Programs or OBH programs.

The Lead Reviewer is responsible for coaching and supervising the reviewer apprentice as well as the other members of the review team. Specific responsibilities include, but are not limited to:
1. Discussing and responding to questions about training materials, background information about the specific site visit, apprentice roles and responsibilities, and strategies for reviewing the Self-assessment Study,
2. Providing direct supervision of the apprentice during the site visit,
3. Submitting the Reviewer Feedback form with recommendations about the suitability of the apprentice to be an Accreditation Program reviewer.

Lead Reviewer Training

Lead Reviewer candidates usually apprentice with an approved Lead Reviewer on a site visit. Additional training may be offered in the regular program at annual conferences to update Lead Reviewers about Accreditation Program policy, industry standards, procedural aspects for conducting site visits, or in response to matters identified in reviewer evaluations of site visits.

Lead Reviewer apprenticeship opportunities are available according to the number and nature of site visits to be conducted in a given period and the availability of Lead Reviewers approved as reviewer trainers.

VII. Supporting Documents for Reviewers

(Link to all supporting documents)

Evaluation Forms

Standards Manuals

Expense Guidelines for Accreditation Program Reviewers

Accreditation Expense Reimbursement Downloadable Form

Accreditation Program Manual

AEE Accreditation Site Visit Guide

AEE Commonly Misunderstood or Unmet Standards (for 6th edition)

Outline for Conducting an AEE Accreditation Review

Outline of AEE Accreditation Process

Conducting an AEE Accreditation Review

Lead Reviewer Checklist

Outline of the AEE Accreditation Process

Reviewer Contacts, Logistics Notes Template (for each edition of the standards manual)

Reviewer Ethical Guidelines Agreement

Reviewer Procedures Handbook

Reviewer Training 2018 PowerPoint

and more....