Manual of Procedures relating to Accreditation Visits

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1. Foreword

The operation of the Canadian Engineering Accreditation Board (CEAB) is governed by the Accreditation Board policy statement, which is contained within the Accreditation Board's annual *Accreditation Criteria and Procedures* report. The annual *Accreditation Criteria and Procedures* report is the official reference for accreditation criteria and procedures information approved by Engineers Canada; as such it is imperative that it be read in conjunction with this *Manual of Accreditation Procedures*.

As part of the accreditation process, the Accreditation Board conducts a visit to the higher education institution requesting accreditation of engineering program(s). This *Manual of Accreditation Procedures* provides additional information about the accreditation process and, in particular, provides details about the events associated with the visit to the institution. The information is intended for use by the accreditation visiting team as well as by the institution itself.

Companion documents to this manual include the:

- Accreditation Board *Accreditation Criteria and Procedures*
- Accreditation Board *Questionnaire for Evaluation of an Engineering Program*
- Accreditation Board Visiting Team Report Template
- Accreditation Board Sample Visit Schedule

Beginning with the 2024/2025 accreditation visit cycle, the content of these documents can also be found within Tandem, Engineers Canada's on-line platform to support accreditation visits.

These documents are available on request from the Accreditation Board Secretariat or can be downloaded from Engineers Canada's website:
http://www.engineerscanada.ca/accreditation-resources

NOTE: The *Accreditation Criteria and Procedures* report, the Accreditation Board *Manual of Accreditation Procedures* and all other Accreditation Board documents are subject to periodic revision. Please ensure that the latest release is being used.

2. Introduction

2.1 The role of the Canadian Engineering Accreditation Board

Engineers Canada was established in 1936 as the federation of the provincial and territorial authorities that license engineers and oversee the profession across Canada.

In 1965, Engineers Canada established the Canadian Accreditation Board, known since 1986 as the Canadian Engineering Accreditation Board. The concept of accreditation was implemented by the profession to test and evaluate undergraduate engineering degree programs offered at Canadian institutions and to award recognition to programs which meet the required standards. With the consent of the engineering provincial and territorial engineering regulators, the Accreditation Board was empowered to develop criteria for undergraduate engineering degree programs and, through a process of direct investigation, to provide engineering schools with a means to have their programs formally tested against these criteria. The criteria for accreditation are formulated to provide graduates with an education satisfying the academic requirements for professional engineering registration throughout Canada.

The Accreditation Board is composed of professional engineers drawn from the academic and non-academic sectors. The members are volunteers and represent different parts of the country as well as a wide range of engineering disciplines.

An accreditation visit is undertaken at the invitation of a particular institution. A team of engineers is assembled consisting of a chair, vice-chair, and program visitors for each program to be assessed. A program visitor may be a representative from either academic or non-academic environments; or, where appropriate, in the case of a program seeking accreditation for the first time, two visitors from each the academic and non-academic environment may be assigned. Provided with documents, including a detailed questionnaire completed by the institution beforehand, the team proceeds to consult with administrators, faculty, students, and department personnel.

The team examines the academic and professional quality of faculty, adequacy of laboratories, equipment, computer facilities, and more. They also evaluate the quality of the students' work on the basis of face-to-face interviews with students, assessment of recent examination papers, laboratory work, reports and theses, records, models or equipment constructed by students, and other evidence of the scope of their education. Furthermore, the team performs an analysis of the curriculum content to ensure that it meets the minimum criteria. Finally, the team reports its findings to the Accreditation Board, which then makes an accreditation decision. The Accreditation Board may grant (or extend) accreditation of a program for a period of up to six years, or it may deny accreditation altogether.

The Accreditation Board publishes an annual listing of the accreditation history of all programs that are currently — or have ever been — accredited.

2.2 Terms of reference

The Canadian Engineering Accreditation Board's goals, expected outcomes, functions and responsibilities, status and authority, and organization as a standing committee of Engineers Canada are specified in Engineers Canada Board Policy 6.9.

2.3 The CEAB Secretariat

The Canadian Engineering Accreditation Board Secretariat is comprised of employees of Engineers Canada. These individuals co-ordinate the activities leading up to, and following, the accreditation visit. Members of the Secretariat provide support to all interested and affected parties in the accreditation system throughout the process.

2.4 Purpose and criteria for accreditation

In September 2016, the Engineers Canada Board carried motion #5596: "THAT the Engineers Canada Board affirm that the primary purpose of CEAB accreditation is to support the licensing activities of its owners, and that this purpose has precedence over any subordinate objectives or coincidental benefits." Therefore, the purpose of accreditation is to identify to the member engineering regulators of Engineers Canada those engineering programs whose graduates are academically qualified to begin the process to be licensed as professional engineers in Canada. The process of accreditation emphasizes the quality of the students, the academic and support staff, the curriculum, and the educational facilities.

Engineers Canada has established specific criteria that guide the Accreditation Board in assessing engineering programs. The criteria and their purposes are presented in detail in the *Accreditation Criteria and Procedures* report. It is essential that institutions seeking accreditation and the visiting team be knowledgeable of the criteria for accreditation. By necessity, some criteria tend to be quantitative (e.g.: curriculum content) while other criteria are more qualitative (e.g.: program environment).

3. Procedures

Section 4 of the *Accreditation Criteria and Procedures* report outlines the procedures involved in the accreditation process and essential facts are given with respect to:

- Initiation and timing of accreditation visit
- Selection of visiting team
- Preparation for the visit
- Accreditation visit
- Visiting team report
- Accreditation decision
- Notice of significant program change
- Formal review

- Informal evaluation or visit
- Publication

Additional details on the procedures are provided in the following paragraphs; it is important that the Procedures section of the *Accreditation Criteria and Procedures* report be read before reading this supplementary information. A calendar of accreditation visit events is provided in Appendix A, and guidelines for non-standard visits are provided in Appendix B.

3.1 The visiting team

All visiting team (VT) members are experienced engineers, both from academic and non-academic settings. They are selected based on their experience in the profession, familiarity with the engineering regulatory process, as well as their ability to maintain a broad outlook and assess modern engineering curricula in terms of overall objectives. Additionally, VT members must:

- Be registered professional engineers in Canada.
- Be experienced in engineering.
- Be proficient in the language of instruction of the institution (both oral and written).
- Have no conflicts of interest[1] with the institution being visited.

A Visiting Team Qualification Rubric is provided in Appendix C.

Members of the visiting team commit to following the Engineers Canada's Board policies on Code of Conduct (4.3) and Confidentiality (4.4). CEAB's *Accreditation Criteria and Procedure report* includes further confidentiality policies and procedures that should be reviewed.[2] VT members will be required to sign a Confidentiality Agreement specific to accreditation visits. A copy of this agreement is available for reference in Appendix D.

The Visiting Team Chair (VTC) chooses Program Visitors (PV) who are responsible for evaluation of particular programs. The Vice Chair (VC) is assigned by the CEAB Executive Committee, in consultation with the VTC, from among the current CEAB Board members or, in exceptional circumstances, from recent CEAB Board members. The entire VT typically visits the Higher Educational Institution (HEI) for two and a half days (typically Sunday through Tuesday). Visitors are usually expected to travel to meet as a team the evening before, and start on campus on the Sunday morning.

Accreditation Criteria and Procedures form the basis of evaluation of the program. Comments and issues outside these criteria may be brought to the attention of the HEI, but they will not be part of the CEAB deliberation process.

[1] Please see Appendix 11, *Conflicts of interest guidelines,* in the *Accreditation Criteria and Procedures* report.

[2] Please see Appendix 10, *Confidentiality: policies and procedures*, in the *Accreditation Criteria and Procedures* report.

3.1.1 Role of the Visiting Team Chair (VTC)

The VTC must ensure that all activities related to the assessment of the programs and that the visit follows Board policies and that the programs are only evaluated against the published accreditation criteria. The VTC serves as the primary contact between the VT and the Higher Education Institution (HEI) and is accountable for the completion of the Accreditation Visit.

The VTC leads and manages the accreditation visiting team, and is charged with ensuring a fair, complete, and thorough visit. The VTC is an experienced member of the CEAB. Under exceptional circumstances the VTC may be a recent member of the CEAB.

The Visiting Team Report goes out under the signature of the VTC, who takes responsibility for its contents and prepares the Visiting Team Report with input from the members of the VT.

Key Responsibilities - VTC

The key responsibilities of the VTC are to organize, lead and manage the visit, including providing training, mentorship and direction to other members of the VT.

The VTC collaborates with and supports other VT members to deliver an integrated assessment of the visit programs. The VTC carries out their work on behalf of the CEAB and must do so in a professional manner and in a manner consistent with CEAB policies and procedures.
Responsibilities of the VTC in advance of the visit:

- Coordinate with the HEI to confirm the dates for the accreditation visit, and communicate the visit dates to the CEAB Secretariat as soon as it is decided.
- Determine if the VT will need CEAB Secretariat support at the HEI or virtually, and confirm the support requirements with the CEAB Secretariat. Typically, visits with 1 or 2 programs under evaluation do not need on-site secretariat support.
- Identify potential VT members, including Vice-Chairs (VC) (in consultation with the Executive Committee) and Program Visitors (PV), confirm their willingness and availability to participate in the accreditation visit if they are approved by the CEAB Secretariat, and provide their names and email addresses to the secretariat.
    - The VT should include at least one other member of the CEAB, normally as VC, who can lead the VT if the VTC is unable to continue in the role.
    - The VT should include a mix of experienced visitors and new visitor(s).
    - The recruitment of the VT should follow best practices in terms of Equity, Diversity and Inclusion (EDI), include academic and non-academic members, and have regional balance.
    - Potential VT members (particularly new members) who have not been on a previous visit with the VTC should be interviewed by the VTC to ensure a good fit for the visit and to identify any specific training requirements.
    - For visits with more than 6 programs, the VTC may wish to have two VCs.

  - For new programs, there are normally two PV assigned, one from academia and one professional engineer outside of academia.
  - If a PV is participating in their first visit, a second more-experienced PV may be added to the VT.
- Establish an effective and collaborative working relationship with the designated official from the HEI at least 6 months in advance of the visit.
  - Ensure that the designated official understands the requirements for advance material beyond the Questionnaire, Exhibits and Data Tables.
  - Agree on the method for electronic, remote access to the additional materials by the VT.
  - Develop an effective and efficient schedule that avoids unnecessary meetings and provides some latitude for additional meetings that might be required during the visit.
  - Agree on the process to be followed in having questions from the VT addressed by the HEI in advance of the visit dates.
- Coordinate with CEAB Secretariat and VT on travel and logistics, including meals and transportation to and from the airport, meals, and the HEI.
- Ensure that issues from the previous visit, as described in the letter to the Dean from the CEAB Chair, which may require particular attention are identified to the members of the VT.
- Develop a work plan and confirm meeting dates for VT meetings in advance of the visit.
  - An introductory on-line meeting of VT at least 3 months in advance of the visit to provide an overview of accreditation and of the work of the VT, and to ensure there is a common understanding of the expectations among VT members (e.g., only assess programs against published criteria).
  - An on-line meeting of the VT within a week after the Questionnaire is made available to the VT, to answer questions, review how to evaluate course and program specific information, how to use the Issue Tracker tool, identify courses or processes that are common across programs and develop a plan for consistent evaluation, etc.
  - Meet with new PVs to provide advice and guidance with respect to the review of the Questionnaire and associated documents, as well as the additional materials from the HEI.
  - Subsequent on-line meetings of the VT, typically weekly or bi-weekly, to discuss the results of the review of the materials provided by the HEI and to develop a focussed set of issues/questions to be posed to the HEI in advance of, or during the visit. The issues can be recorded by the VTC in the Issue Tracker that VT members can access following each VT meeting.
  - Follow-up with the HEI designated official to relay questions to the HEI from the VT meetings and responses from the HEI to the VT.
  - For large visits, the VT may be subdivided for the weekly meetings with the VTC and VCs sharing the Chairing of these meetings. The VTC and VCs will coordinate to ensure continuity and consistency in identifying and addressing issues.

- Assign responsibilities to PVs and other VT members for the review of course material and submissions related to other criteria. Typically, the VC is assigned responsibility for common core courses and courses focussing on GA attributes 6-12 in consultation with the PVs.

Responsibilities of the VTC during the visit:

- Lead meetings during the visit.
- Serve as the primary contact person for the HEI regarding visit logistics, including information requests of the HEI during the visit and communication of issues that the VT identifies as the visit progresses.
- Troubleshoot issues arising during the visit.
- Ensure that the VT adopts a collaborative tone in dealings with the HEI during the visit.
- Reassign VT responsibilities during the visit in order to ensure the goals of the accreditation visit are met within the visit time period.
- Exercise effective time management for all aspects of the visit, including the end-of-day in-camera VT meetings.
- Ensure all VT members update their Issue Tracker.
- Lead the end-of-day VT in-camera meetings to discuss outstanding issues.
- Mediate differences of opinion between VT members.
- Ensure the VT is makings assessment only in terms of the published criteria.
- Ensure that all programs within the visit are evaluated in a consistent manner.
    - Review programs to identify courses that are common to multiple programs or which utilize common GA/CI processes.
- With the VC, meet with the Dean each morning to provide briefing on issues outstanding with the visit at that point in time.
- With the VC, meet with and interview the institution's leadership team in order to understand the priority placed on engineering programs at the HEI.
- With the VC, meet with and interview students who are leading the Undergraduate Engineering Society and other pan-faculty clubs and societies.
- With the VC, meet with the industry advisory group/stakeholders to understand their impressions about, and involvement, in the engineering programs.
- In the exit statement with the HEI, provide a clear and concise summary of the issues for each program that were identified by the VT and which were not resolved at the time of the exit statement.
- In the exit statement with the HEI, provide some brief comments on program strengths that were noted by the VT.
- Ensure that final observations have been provided by each of the PVs in their Issue Trackers before the exit statement.

Responsibilities of the VTC following the visit:

- Work with the CEAB Secretariat to translate the information provided by the PVs in the final Issue Trackers into a draft Visiting Team Report.

- Review, edit (in consultation with the editor) and sign-off on the Visiting Team Report.
- In consultation with VT members, as required, review the Dean's response to the Visiting Team Report and seek clarification as necessary from the Dean to understand the response, particularly for any issues where there is disagreement between the HEI and the Visiting Team Report.
- Review the Dean's response to the Visiting Team Report and, in consultation with members of the VT as required, determine whether the issues raised in the Visiting Team Report have been addressed by further evidence provided in the Dean's reply or subsequent communications.
    - Issues should only be considered resolved when the actions have been taken that fully resolve the issue. General plans to address an issue with criteria or future definitive actions that will address an issue with criteria do not 'resolve' an issue.
- Work with the assigned Reviewer to determine which issues remain unresolved as of the CEAB decision meeting and to determine a proposed motion for the decision meeting.
- Be available at CEAB decision meeting when the outcomes of the accreditation visit are considered by the Board. The VTC is typically the Presenter during the formal consideration of the program(s) in the decision meeting.

The VTC is responsible for information in the Visiting Team Report, and should have an understanding of all issues before the decision meeting. The VTC may edit and elaborate on the issues and comments on the Issue Tracker in preparation of the Visiting Team Report to improve clarity and provide appropriate detail.

Required Time Commitment - VTC

Accreditation visits typically take place during October, November, January, or February. Time commitments vary depending on the HEI visited, the number of programs, or the issues arising during the course of the review of materials. Overall, the time commitment for the VTC in advance of the visit is on the order of 60 hours for assembling the VT, liaising with the HEI regarding the visit schedule, mentoring newer VT members, reviewing materials prepared by the HEI, and leading VT meetings, as well as follow-up work arising from the meetings.

The time commitment associated with the on-site visit is the travel time to-from the HEI plus 3 days of meetings at the HEI (part of Sunday, Monday and part of Tuesday) and with the VT (informal Saturday evening dinner, Sunday morning, Sunday evening, Monday evening).

During the visit, the days and evenings are busy and the timelines are tight, so the VTC must set aside other commitments for that period of time.

With the support of the CEAB Secretariat, the VTC typically spend 4 hours preparing the Visiting Team Report and a further 3 hours reviewing additional information provided by the HEI in response to the Visiting Team Report. An additional 2 hours of time by the VTC is

spent on collaborating with the assigned Reviewer to prepare the CEAB Decision Meeting for each program that was assessed.

Support and Training - VTC

Typically, VTCs are individuals who currently serve on the CEAB and who have had previous experience as a PV or VC. To ensure smooth operation of the visit, the CEAB has developed tools to help VT members feel comfortable about their duties. Of particular relevance to the VTC is the following:

- **A Guide to Engineering Accreditation**. This online training module provides an overview of the accreditation process and is required reading for all visiting team members.

For visits to HEIs in Ontario, all VT members must complete the Accessibility for Ontarians with Disabilities Act (AODA) Customer Service training module.

Expenses related to the visit including travel, meals, and accommodation will be reimbursed or covered. The CEAB Secretariat will arrange lodging and meals during the visit. The VTC will not bear the costs of transportation, food or lodging. All VT members are required to comply with the Engineers Canada Travel/Expense Reimbursement Policy to be fully reimbursed for expenses.

Appointment

With the assistance of the CEAB Secretariat (as needed), the CEAB Executive Committee identifies a potential VTC from among the current CEAB Board members or, in exceptional circumstances, from recent CEAB Board members. The Visiting Team Qualification Rubric (see Table 1) is used in assessing the suitability of individuals for participation on a VT.

The CEAB Secretariat consults with the HEI with respect to the suitability of the proposed VTC appointment and, if there are no conflict of interest (COI) issues, confirms the appointment. In the event of a COI, the CEAB Executive Committee identifies an alternative potential VTC.

3.1.2 Role of the Visiting Team Vice-Chair (VC)

The VC's general responsibility is to assist the VTC with the program evaluation, and the specific role will vary between visits depending on program size and structure. Typically, the VC will take the lead in overseeing evaluation of the graduate attributes and continuous improvement (GA/CI) assessment in collaboration with the PVs. In addition, the VC will also take on responsibility for evaluation of faculty-wide policies and the curriculum content that is common across programs, such as the core mathematics and science content and components of complementary studies. For visits with 6 or more programs, the VTC may wish to have two VCs who may be delegated responsibility to oversee groups of programs.

VCs are typically individuals who currently serve on the CEAB. Under exceptional circumstances or where the team has a second VC, the VC may be an individual who recently served on the CEAB and who has a record of positively rated experiences as a VTC

or VC. Given the role that the VC plays in support of other members of the VT and the prospect of having to assume the role of VTC in the event that the VTC becomes incapacitated, it is important that the VC have experience organizing visits, have strong knowledge of the GA/CI processes, and be familiar with engineering-wide contemporary curriculum (e.g., delivery of engineering-wide courses, complementary studies, professionalism, equity, health and safety, sustainability, etc.).

The VC should be familiar with the visit structure and communications so they can lead the VT if the VTC is unable to function in the Chair role or to attend the visit.

Key Responsibilities - VC

The key responsibilities of the VC are to assist the VTC with the visit, including supporting other visiting team members, particularly in terms of the review of the Graduate Attribute/Continual Improvement processes.

In the event that the VTC becomes incapacitated and is unable to carry out their responsibilities, the VC will assume the role of VTC until such a time that the original VTC can resume the chair. If the VC assumes the VTC responsibilities prior to the visit and the original VTC is not expected to be able to participate in the visit, the CEAB Secretariat will endeavor to find another individual to serve as a VC.

Responsibilities of the VC will be assigned by the VTC in advance of the visit, and vary between visits. Much of the work of the VC is done in collaboration with other members of the VT and generally includes a combination of the following.

Responsibilities of the VC in advance of the visit:

- Review and conduct an evaluation of faculty-wide policies for admission, progression, probation, degree audit, and transfer.
- Review and conduct an evaluation of faculty-wide activities that may include experiential learning, career development, co-op, student advising, transfer pathways.
- Review and conduct an evaluation of faculty-wide or multi-program curriculum elements that may include common first year course, common math, science, and engineering science, design and professionalism, and complementary studies.
- Review and conduct a preliminary evaluation of faculty-wide or multi-program structure of graduate attribute and continuous improvement activities, including external stakeholder engagement, advisory boards. The VC also works closely with PVs on the evaluation of program-specific elements of the graduate attribute and continual improvement processes.
- Assist the VTC with providing mentorship to other members of the VT, and support the activities of other VT members as necessary.
- For large visits, the VT may be subdivided for the weekly meetings with the VTC and VCs sharing the Chairing of these meetings. The VTC and VCs will coordinate to ensure continuity and consistency in identifying and addressing issues.

Responsibilities of the VC during the visit:

- Be fully available for VT meetings between the start of the visit and the exit statement with the HEI.
- Follow up on areas assigned to their role as identified in advance of the visit.
- Assist the VTC (as needed) in meetings with senior administration about long-term plans, resources, institutional support for engineering.
- With the VTC, meet with the Dean each morning to provide briefing on issues outstanding with the visit at that point in time.
- With the VTC, meet with and interview the institution's leadership team in order to understand the priority placed on engineering programs at the HEI.
- With the VTC, meet with and interview students who are leading the Undergraduate Engineering Society and other pan-faculty clubs and societies.
- With the VTC, meet with the industry advisory group/stakeholders to understand their impressions about, and involvement, in the engineering programs.
- Assist the PVs (as needed) in meetings with program officials or other individuals who are interviewed during the visit.
- Assist the VTC in ensuring consistency in expectations across program assessments.
- Support other members of the VT as required.

Responsibilities of the VC after the visit:

- Assist the VTC in completing the Visiting Team Report.
- Assist the VTC in reviewing and commenting on the response of the HEI to the Visit ing Team Report, as requested.

Required Time Commitment - VC

Accreditation visits typically take place during October, November, January, or February. Time commitments vary depending on the HEI visited, the number of programs, or the issues arising during the course of the review of materials. Overall, the time commitment for the VC in advance of the visit is on the order of 40 hours for review of materials prepared by the HEI and for participation in VT meetings and follow-up work.

The time commitment associated with the on-site visit is the travel time to-from the HEI plus 3 days of meetings at the HEI (part of Sunday, Monday and part of Tuesday) and with the VT (informal Saturday evening dinner, Sunday morning, Sunday evening, Monday evening).

The VC is expected to be available as-needed following the visit to review the Visiting Team Report and consult with the Chair on responses to the Visiting Team Report by the HEI, as requested. This may involve in the order of 3 hours of time by the VC.

During the visit, the days and evenings are very full and the timelines are tight, so the VC must set aside other commitments for that period of time.

Support and Training - VC

To ensure smooth operation of the visit, the CEAB has developed tools to help VT members feel comfortable about their duties. Of particular relevance to the VC is the following:

- **A Guide to Engineering Accreditation**. This online training module provides an overview of the accreditation process and is required reading for all visiting team members.

Additional training and visit-specific expectations will be provided during the pre-visit teleconference(s) facilitated by the VTC.

For visits to HEIs in Ontario, all VT members must complete the Accessibility for Ontarians with Disabilities Act (AODA) Customer Service training module.

Appointment - VC

With the assistance of the CEAB Secretariat (as needed), the CEAB Executive Committee, in consultation with the VTC, identifies a potential VC from among the current members of the CEAB or from among individuals who recently served on the CEAB and who have a record of positively rated experiences as a VTC or VC. The Visiting Team Qualification Rubric (see Table 1 below) is used in assessing the suitability of individuals for participation on a VT.

The CEAB Secretariat consults with the HEI with respect to the suitability of the proposed VC appointment and, if there are no conflict of interest (COI) issues, confirms the appointment. In the event of a COI, the VTC identifies an alternative potential VC.

3.1.3 Role of the Program Visitor (PV)

The Program Visitor (PV) is a member of the VT whose primary responsibility is to evaluate the depth and breadth of a specific engineering program in relation to the *CEAB Accreditation Criteria and Procedures*. The PV must have professional technical knowledge of the engineering discipline related to the program being visited.

A PV may work closely with other PVs if several programs are similar. The VTC and VC are available for mentorship and guidance. The PV will collaborate with the VC in the evaluation of the graduate attributes and continual improvement elements of the program as well as in the evaluation of elements of the program (e.g. facilities, safety, professionalism, etc.).

Key Responsibilities - PV

The key responsibilities of the PV are to focus on the aspects of the educational process specific to the program in order to identify whether, based on evidence provided by the HEI, there are any issues that need to be resolved in order for each criterion to be satisfied. The PVs serve as experts on the technical and relevant professional elements of the program assigned, and they assess programs in terms of both breadth and depth.

PVs collaborate with, and support as appropriate, other VT members to deliver an integrated assessment of the visit programs. The PVs carry out their work on behalf of the

CEAB and must do so in a professional manner and in a manner consistent with CEAB policies and procedures.

Responsibilities of the PV in advance of the visit:

- Provide CV and other information requested by the CEAB Secretariat in order for the secretariat to determine whether an appointment to the VT is appropriate.
- Undertake any on-line training required by the CEAB or the HEI.
- Review program-related information and supporting material submitted by the HEI and make observations with respect to any of the CEAB criteria.
- Coordinate with other VT members to ensure consistency in evaluation of programs.
    - There is normally some sharing of program content or GA/CI processes or support services among programs and it is critical that the members of the VT collaborate to provide a consistent evaluation to the criteria influenced by such common elements.
- Participate in all on-line meetings of the VT.
- Complete the required review of specific materials (as per direction of the VTC) in advance of meetings.
- Provide the VTC with requested information (e.g., log observations in the Issue Tracker, questions for HEI feedback on draft schedule, etc.).
- Make appropriate travel arrangements to ensure arrival at the HEI prior to the first face-to-face meeting of the VT as specified by the VTC and to depart following the exit statement with the HEI;

Responsibilities of the PV during the visit:

- Be fully available for VT meetings between the start of the visit and the exit statement with the HEI.
- Meet with and interview the institution's instructional team, as well as support staff, in order to further understand any issues identified prior to or during the visit.
- Meet with and interview students in the program to understand their experiences in the program.
- Meet with the industry advisory group/stakeholders for the program to understand their impressions about, and involvement, in the program.
- Meet with the Head and program official each morning to provide briefing on issues outstanding with the visit at that point in time.

- In advance of the exit statement and in consultation with the VTC and other members of the VT, finalize a clear and concise summary of the issues for the program that were not resolved prior to or during the visit.
- In advance of the exit statement, provide the VTC with some brief comments on program strengths that can be communicated at the exit statement.
- Provide the VTC with the final 'tracking issues' spreadsheet for the program before the exit statement.

- All relevant sections of the Issue Tracker must be completed (e.g., comment on the HEI's self-assessment, identify strengths, and note any suggestions in the appropriate places in the tracker).

Responsibilities of the PV after the visit:

- At the request of the VTC, provide support to the VTC in giving consideration to any additional information provided by the HEI in response to the VT report.

Required Time Commitment - PV

Accreditation visits typically take place during October, November, January, or February. Time commitments vary depending on the HEI visited, the number or programs, or the issues arising during the course of the review of materials. Overall, the time commitment for the PV in advance of the visit is on the order of 40 hours for review of materials prepared by the HEI and for participation in VT meetings and follow-up work.

The time commitment associated with the on-site visit is the travel time to-from the HEI plus 3 days of meetings at the HEI (part of Sunday, Monday and part of Tuesday) and with the VT (informal Saturday evening dinner, Sunday morning, Sunday evening, Monday evening).

The PV is expected to be available as-needed following the visit to consult with the VTC on responses to the Visiting Team Report by the HEI. This is not a common occurrence but could involve 1-2 hours of time by the PV.

During the visit, the days and evenings are full and the timelines are tight, so the PV must set aside other commitments for that period of time.

Support and Training - PV

To ensure smooth operation of the visit, the CEAB has developed tools to help VT members feel comfortable about their duties. Of particular relevance to the PV is the following:

- **A Guide to Engineering Accreditation**. This online training module provides an overview of the accreditation process and is required reading for all VT members.

Additional training and visit-specific expectations will be provided during the pre-visit teleconference(s) facilitated by the VTC.

For visits to HEIs in Ontario, all VT members must complete the Accessibility for Ontarians with Disabilities Act (AODA) Customer Service training program.

Expenses related to the visit including travel, meals, and accommodation will be reimbursed or covered. The CEAB Secretariat will arrange lodging and meals during the visit. The PV will not bear the costs of transportation, food, or lodging. All VT members are required to comply with the Engineers Canada Travel/Expense Reimbursement Policy to be fully reimbursed for expenses.

Appointment - PV

With the assistance of the CEAB Secretariat (as needed), the VTC identifies potential PVs from a roster of individuals maintained by the CEAB Secretariat or from recommendations from other CEAB members or experience of the VTC on previous visits. The Visiting Team Qualification Rubric (see Appendix C below) is used in assessing the suitability of individuals for participation on a VT.

The CEAB Secretariat consults with the HEI with respect to the suitability of proposed PV appointments and, if there are no conflict of interest (COI) issues, confirms the appointment. In the event of a COI, the VTC identifies an alternative potential PV.

3.1.4 Role of the Observer

The purpose of Observer attendance on an accreditation visit is to provide specific individuals outside of the visiting team with an opportunity to learn about the CEAB accreditation criteria and procedures, observe the application of these criteria during an accreditation visit, and develop an understanding of the nature of the accreditation visit process. The Observer role is limited to HEI staff and faculty members (including but not limited to deans, associate deans, program heads) as requested by the deans of institutions hosting an upcoming accreditation visit, Engineers Canada Board Directors and staff, regulator staff and regulator-named volunteers, CEAB members, and CEAB members-elect3. Observers cannot be individuals associated with the HEI being visited, and they must comply with the CEAB Conflict of Interest and Confidentiality Agreement provisions.

Key Responsibility

An approved Observer is allowed to observe all activities related to the assessment of the programs, including access to the program-submitted materials, pre-visit and on-site meetings. An Observer plays no part in any accreditation decisions and is not expected to provide the CEAB with any comments or observations following the visit. To satisfy their own learning objectives, Observers are normally welcome to attend any meeting or tour, but they may only ask questions during the private visiting team meetings. During the on-site visit, an Observer does not participate in discussions, interview HEI representatives (including students), engage in data collection or validation, or present opinions in meetings. The Visiting Team Chair has the authority to limit the participation of an Observer or to remove the Observer from the team at any time.

Required Time Commitment

Accreditation visits typically take place during October, November, January, February, or June. The time commitment varies depending on the HEI visited, the number of programs, and the observations arising during the review of materials.

[3] Other individuals may express their interest directly to the CEAB Secretariat. Their request and qualifications will be reviewed and assessed by the Executive Committee for approval.

The time commitment associated with the on-site visit includes the travel time to/from the HEI plus three days of meetings at the HEI (often part of Sunday, Monday and part of Tuesday) and with the visiting team (often informal Saturday evening dinner, Sunday morning, Sunday evening, Monday evening). Observers must stay engaged in the accreditation visit process and refrain from conducting other professional business during the visit.

Expenses

Except for Engineers Canada Board Directors and staff, CEAB members, and CEAB members-elect, expenses related to the visit, including travel and accommodation, are not covered by Engineers Canada. The CEAB Secretariat typically makes lodging arrangements for an Observer at the same hotel as the visiting team members, at the Observer's cost.

Observers are welcome to join the CEAB visiting team for lunches at the HEI at the HEI's expense and dinners at Engineers Canada's expense. All other expenses related to meals, incidental costs, and/or per diems will not be reimbursed by Engineers Canada.

Observer Approval

Individuals interested in being an Observer on an accreditation visiting team should contact the CEAB Secretariat. The CEAB Secretariat determines whether the individual qualifies for the role, has any conflict of interest (COI), seeks the consent of the Visiting Team Chair, and then seeks the consent of the HEI hosting the visit regarding the participation of the proposed Observer. If no COI issues are raised, the CEAB Secretariat confirms the Observer's participation on the visiting team. In the event of a COI, the CEAB Secretariat may suggest an alternative visit.

Please note:

- Like all visiting team members participating in an accreditation visit, Observers are required to sign the Volunteer Conduct Statement, the Conflict-of-Interest Declaration, and the Confidentiality Agreement.
- The number of Observers on any given visit is limited to a maximum of two.
- Observers cannot be appointed to a visit less than eight weeks before the start of a visit.
- Due to various constraints (such as those discussed above), Observer opportunities are not guaranteed.

3.2 Additional visitors and specialists

Additional visitors, and specialists are appointed as necessary by the Canadian Engineering Accreditation Board with the agreement of the visiting team chair and the institution. These individuals must be identified no later than eight weeks before the start of the accreditation visit. Requests received with fewer than eight weeks before the start of the accreditation visit will be declined and future opportunities will be sought for participation.

3.3 Visit preparation

An institution initiates an accreditation visit by submitting a Request for Accreditation form to the Accreditation Board Secretariat. This request must be received by July 1 of the calendar year preceding the visit cycle. The calendar of accreditation visit events is contained in Appendix A of this manual.

Following receipt of the institution's Request for Accreditation, the Canadian Engineering Accreditation Board Secretariat initiates procedures to inform the Accreditation Board Executive Committee so they can select a VTC, and to provide the institution with the required Accreditation Board documents (Questionnaire, manuals, etc.), access to accreditation data management platform, Tandem, and information about the assigned VTC. The Accreditation Board Secretariat sends the appointed VTC all documents required to organize and conduct the visit.

The visiting team chair and the institution agree upon a date for the visit. As soon as possible, the team chair selects the visiting team members (subject to the agreement of the dean/designated official) and the Accreditation Board Secretariat provides them with an information package.

The institution may request a replacement for any team member, including the visiting team chair, only for good cause.

The institution receives the list of the confirmed visiting team members along with their resumes and contact details.

All visit materials are to be submitted electronically via Tandem eight weeks before the start of the visit. If adequate documentation is not received as required, the Accreditation Board Executive Committee, in consultation with the visiting team chair, may cancel the visit.

The visiting team chair and the dean/designated official of the institution agree upon an on-site visit schedule including interviews with faculty, students, support departments and facilities, and members of the administration. The schedule should be finalized at least two weeks before the start of the visit. Once this schedule is finalized, it should be adhered to as closely as possible.

Arrangements for lodging, off-campus meals, conference rooms, etc., are made by the Accreditation Board Secretariat. Arrangement for meeting spaces, meals, and breaks for the visiting team while they are on-site at the institution are made by and paid for by the institution; all other costs for the visit are paid by Engineers Canada.

3.4 The visit

An accreditation visit normally spans over three days. It provides an opportunity for the visiting team to assess qualitative factors such as intellectual atmosphere and morale, professional attitudes and the quality of staff and students. The visit provides the opportunity for activities such as:

a) interviews with appropriate senior administrative officers including the president, the dean of engineering and the heads of the departments responsible for the programs,

b) interviews with individuals and groups of faculty members to evaluate professional attitudes, motivations, morale and the balance of opinions concerning theoretical and practical elements of the curriculum,
c) interviews with individual and groups of students,
d) tours of physical facilities such as laboratories, libraries and computing facilities to evaluate their effectiveness, and
e) review of documents (e.g. course outlines, test and examination papers, laboratory reports, senior projects, etc.) assembled by the institution for examination by the visiting team.

Before the end of the visit, the visiting team meets with the dean and, preferably, the head(s) of the department(s) responsible for the programs to review the perceived strengths and to indicate any areas of concern. Program officials can invite others to attend this session if they feel it is appropriate.

The following is a typical visit schedule:

Before the visit

Beginning two months before the visit, at the discretion of the team chair, meetings with the visiting team members may be called to a) introduce CEAB accreditation principles and procedures, b) discuss findings of team members' review of submitted documentation, c) discuss visit logistics, and d) to build team cohesion. Meetings are organized by the Secretariat.

The team chair should outline the procedure for the visit and review visiting team member assignments. Items of uncertainty should be identified and plans made to address these items during the visit. In addition, assignments for service departments such as mathematics and physics, the library, the computing facilities, and the complementary studies areas should be finalized. Although of interest to the entire team, the team chair is generally responsible for assessing the administration of the institution.

While individual members of the team have primary responsibility for observing and reporting on their assigned tasks, the team chair should impress on the team that all team members should develop an awareness of the overall environment including qualitative factors such as intellectual atmosphere and morale, professional attitudes, and the quality of staff and students.

In the lead up to the visit, the visiting team chair may liaise with the dean or designated official in order to seek clarification and/or additional information as a result of the visiting team's review of documentation, or to discuss the development of the visit schedule.

Afternoon or evening prior to the visit

It is important that the chair of the visiting team calls the team together on the afternoon or the evening before the visit to allow sufficient time to organize team activities.

First day

Morning: The entire team should meet with the dean (or equivalent) and department heads (or equivalent) at the start of the visit. At this introductory meeting, schedules for the various team members to meet with their appropriate engineering and service departments should be confirmed. As appropriate, the dean should make arrangements for an interview with the president (or equivalent) of the institution. Team members should proceed with their individual assignments immediately after this introductory meeting, starting with a private meeting with the appropriate department head.

Luncheon meeting: If the institution desires to provide a luncheon for the team it may do so on the first day. Very often this is a convenient time to have the team meet with the president of the institution. The Accreditation Board requests that the institution limit entertainment for the visiting team to this event and that the luncheon be scheduled to last no more than one hour.

Afternoon: Team members proceed with their individual assignments.

Evening: The team should assemble at the end of the day, usually after dinner. The discussion usually requires the whole evening of the first day. At this time, team members review the findings that they have made with the other members of the team. They cross-check the findings with the other members to determine if occur throughout the engineering unit or are particular to a program, department, or curriculum. Whenever a team member finds unusual conditions, the team chair should arrange to have at least one other member of the team cross-check these conditions the following morning.

Second day

Morning: The team chair meets with the program leadership to discuss early findings and to make requests (as necessary) for adjustment to the schedule. Team members should complete the work on their individual assignments. As much cross-checking of other programs is done as the previous evening's discussion warrants.

Luncheon meeting: The visiting team may use this time to work, but it is also an opportunity for meetings with large groups where generative conversations may help with validation of the information provided by the programs. Luncheons with faculty, students, alumni, and/or program advisory committee members may be considered.

Afternoon: Team members proceed with their individual assignments.

Evening: The team should assemble at the end of the day, usually after dinner. Once again, team members review the findings that they have made with the other members of the team and discuss the strengths and the weaknesses found and cross-check with the other members.

Third day

Morning: The team chair meets with the program leadership to discuss early findings and to make requests (as necessary) for adjustment to the schedule. Team members should

complete the work on their individual assignments. As much cross-checking of other programs is done as the previous evening's discussion warrants.

Luncheon: The team assembles in private for lunch on the third day. Team members discuss the findings that are to be included in their accreditation visiting team reports and at the report of team findings. The findings of the entire team, including the team chair's findings, should be correlated and agreed upon by the team.

Team members complete the preliminary copy of their findings; the institution **must not** receive a copy of these findings at this time.

Afternoon: As a result of the agreement between the team members on their findings, as noted above, the entire team holds a session with the dean (and, if agreeable to the dean, the department heads and/or other members of the program community) to communicate verbally the findings of the team. This is called the 'Exit Statement'. A copy of the Exit Statement is included below as Appendix E.

It is important at this point that the dean be made aware of all of the major findings that will be included in the final *Report of the Visiting Team* to the Accreditation Board. While an attempt will be made to identify all of the issues arising from the visit, the Accreditation Board reserves the right, based on the final visiting team report, to correct any errors, omissions or misstatements that have been made by the visiting team.. It must be made clear to the dean that the accreditation decisions are made only by the Accreditation Board and that these decisions, along with the reasons for them, will be conveyed to the institution in writing by the chair of the Accreditation Board. This statement, which should be scheduled for approximately one hour, concludes the visit.

Ending the visit: Oftentimes, informal greetings and social conversations will occur as those in attendance of the Exit Statement prepare to leave. It is important that visiting team members refrain from answering any follow-up questions or discussing any aspect of the Exit Statement or outstanding element of the accreditation visit. Sometimes, local staff or faculty members may offer visitors a ride to the airport, train station or hotel. Accepting these offers is at the discretion of individual visitors as long as they are mindful that the topics discussed during this time do not cover details pertaining to the accreditation visit or its foreseeable outcome. For more information, visiting team members may refer to Engineers Canada's volunteers Code of Conduct as well as the Confidentiality Agreement signed ahead of the visit.

3.5 Visiting team report

The chair of the visiting team, working with the findings of the team members, and with support from the CEAB Secretariat, prepares a report on the program(s) visited. This is a report of the team's findings which includes: areas of conformance to and deviation from the Accreditation Board criteria (as interpreted by the visiting team); perceived strengths and suggestions for improvement, if any. Ideally, the *Report of the Visiting Team* will not include any major findings not previously mentioned and revealed during the exit statement; additional findings may become apparent as the visiting team completes the report and will be included if necessary.

The Issue Trackers should be finalized **within two weeks of the visit**. The Secretariat will then compile the visiting team's observations into the Report template, and will provide the VTC with a draft of the Report for their review and/or comments **within two weeks**.

3.6 Post-visit activities

When the visiting team report is received by the Accreditation Board Secretariat, a copy is sent to the member of the Accreditation Board designated as editor of this report. The editor is a senior member of the board (in their second term) and is tasked with making fair, consistent, just evaluations of programs based on all documentation including the visiting team report, focusing on issues identified by the visiting team and subsequent responses from the HEI.

The main responsibilities of the editor are to ensure that the VT report is complete, consistent, and appropriate based on accreditation procedures, and to ensure that the CEAB decision is correctly recorded by:

- Reviewing the visiting team report before it goes to the HEI:
- Ensuring issues common to all programs are flagged across all programs.
- Ensuring that issues (items identified with an asterisk) are related to required criteria and that observations based on opinion are in the appropriate section of the report.
- Ensuring the ideas in the report are understandable to people other than the visiting team.
- Ensuring proper grammar and complete sentences are used in the document.

If the editor identifies recommendations for Accreditation Board action and/or comments on areas outside the Accreditation Board's Terms of reference for accreditation, such statements, if any, are deleted.

The edited report is sent by the Accreditation Board Secretariat to the Dean (or equivalent) of the institution for comment and reaction to ensure accuracy and completeness; this also provides an opportunity for the institution to advise on improvements being implemented in the current academic year.

After the response is received from the institution, it is forwarded to the visiting team chair for comments.

The Accreditation Board Secretariat prepares an **Accreditation Decision Dossier** which contains all the relevant materials required for consideration by the Accreditation Board in order to arrive at an accreditation decision. The Accreditation Board may communicate with both the institution (via the visiting team chair and/or the Secretariat) and the visiting team chair with the intent of ensuring that the Accreditation Decision Dossier is complete and accurate.

Normally, the Accreditation Board holds its accreditation decision meeting related to visits during June of each year, but decisions may be made at any meeting. The decision-making process, as well as the various types of decisions made by the Accreditation Board, is

specified in the Accreditation decision section of the Accreditation Board *Accreditation Criteria and Procedures* report.

Following Accreditation Board accreditation decisions, the institution is notified of the decision(s) through the dean and the president. The dean is provided with a comprehensive explanation for the decisions via a letter from the Accreditation Board chair. The institution is expected to inform students and staff of the process of accreditation and of the accreditation status of its programs.

Appendix A: Calendar of accreditation visit events

Introduction

Normally, Accreditation Board accreditation visits are conducted in accordance with one of the following:

> **Accreditation visits** are conducted through November to February for programs with accreditation terms that will expire the following June 30 or for new programs which will have their first graduating class graduate during the following spring, and in June/July for programs that graduate students in August. Requests for such visits must be received by the Accreditation Board Secretariat by July 1 of the calendar year preceding the year in which the visit cycle begins. If there will be no graduating class students on campus during the fall visit period, the Accreditation Board Secretariat should be informed so that alternate arrangements may be made.
>
> **Early re-visits** may be conducted in the fall or winter immediately following an Accreditation Board decision to deny accreditation to a non-accredited program. Such early re-visits are scheduled only after approval of the Accreditation Board Executive Committee.

The sections below provide a summary of important dates relative to each of the visit cycles. This schedule is for illustrative purposes only and dates may change depending on graduation cycle.

A.1 Accreditation visits

Date	Event	Action by
April 20XX-2	Dean is reminded that accreditation expires **June 30, 20XX**, and that an accreditation visit must be requested by **July 1, 20XX-2**.	Secretariat
September 20XX-2	Visiting team (VTC) chair is identified at Accreditation Board fall meeting. (to be confirmed at winter meeting)	Accreditation Board
October - December 20XX-2	Acknowledgment of a request for a visit is sent to Dean.	Secretariat
	The appropriate provincial and territorial engineering regulators are notified of the request for a visit.	Secretariat
September 20XX-2 - January 20XX-1	Dean/designated official confirms acceptability of VTC chair. (Dean/designated official may only veto for good cause, i.e. conflict of interest.)	Secretariat
	VTC chair is appointed. Programs to be visited are confirmed.	Secretariat
December 20XX-2-February 20XX-1	Documentation for a visit (accreditation questionnaire, criteria for accreditation,	Secretariat

Date	Event	Action by
	accreditation procedures, and others) is sent to dean/designated official.	
February – March 20XX-1	Documentation for visit (criteria for accreditation, accreditation procedures, etc.) is sent to VTC chair.	Secretariat
November 20XX-2- February 20XX-1	VTC chair and dean/designated official agree on visit date in the fall or winter or spring/summer semester. VTC chair confirms the date in writing to Dean/designated official and Accreditation Board Secretariat by **March 1**.	VTC Chair
February 20XX-1 (continued)	As part of setting the dates for the visit, the dean/designated official confirms the availability of the president/rector, appropriate vice-presidents/vice-rectors, and other central administration personnel (e.g. registrar, dean of graduate studies, deans of faculties providing service courses.) with whom the VTC chair will meet.	Dean/Designated official
	Dean/designated official prepares suggested schedule for V.T Chair, Vice-chair, and Program Visitors and provides the draft schedule by **February 15** to the VTC chair for comment.	
	Program visitors are selected. Team member names are sent to Secretariat on **March 15**.	VTC chair
	Agreement on the Vice-chair and Program Visitors is received from the dean/designated official following a review for conflicts of interest and/or declarations/management.	Secretariat
March 15 – April 15, 20XX-1	Engineering regulators is notified of visit date.	Secretariat
July – August 20XX-1	The final list of team members with their addresses is sent to dean/designated official for distribution of the questionnaire.	Secretariat
	Vice-chair and program visitors are sent and sign a confidentiality agreement regarding anything they learn as part of their duties as a visting team member.	Secretariat & Team members
	Documentation for a visit (criteria for accreditation, accreditation procedures, and others) is sent to all team members.	Secretariat

Date	Event	Action by
	Visit arrangements and hotel accommodations are made by the Secretariat and confirmed with team members.	Secretariat
	Tentative assignments of responsibility should be issued to team members.	VTC chair
	Schedule for observers (if any) should be finalized based on dean's suggestions.	VTC chair
8 weeks before visit (August - December)	Completed accreditation questionnaire is sent to team members and Secretariat and detailed syllabi, documentation of assigned work and assessments, and evaluated student work is submitted in electronic form (when possible) to the visiting team. This material is to be submitted at a time agreed upon by the Visiting Team Chair and the Program. (It must be received 8 weeks prior to the visit.) **If adequate documentation is not received as required, the Accreditation Board Executive Committee, in consultation with the VTC chair, may cancel the visit.**	Dean/Designated official
4 weeks before visit	Program Directors/Department chairs prepare suggested schedules for program visitors. All schedules to be provided directly to program visitors by **four weeks before the visit** with copies to the Dean/designated official and VTC chair.	Program Director/ Department Chair
Visit date	**The on-campus visit occurs.**	**Visiting team**
End of visit	Individual team member reports are submitted to VTC chair.	Team members
	Evaluation forms for visiting team members are sent to the VTC chair for completion.	Secretariat
	Survey links to collect data as part of the Accountability in Accreditation initiative are distributed to HEI officials, students who participated in the visit, and all visiting team members.	Secretariat
Visit date + 2 weeks	Expense claims submitted to Engineers Canada.	Team members
Visit date + 4 weeks	A copy of the VTC chair's report is sent to VTC members.	VTC chair
	Visiting team report is sent to Secretariat. Visitor evaluation forms are submitted to Secretariat.	VTC chair

Date	Event	Action by
December 20XX-1/ February – March 20XX	VTC report is sent to Accreditation Board Executive Committee for editing.	Secretariat/ Exec. Committee
	Edited VTC report is sent to VTC chair for review and comment.	Secretariat/ VTC chair
March – April 20XX	VTC report is sent to Dean for comment.	Secretariat
	Dean sends his/her comments on VTC report to Secretariat.	Dean
	Dean's comments are sent to VTC chair for his/her comments.	Secretariat
	VTC chair sends his/her response to the dean's comments to Secretariat, and Secretariat forwards it to the dean for information.	VTC chair
May 20XX	Accreditation decision dossier (ADD) is provided to Accreditation Board members.	Secretariat
2 weeks before decision meeting (meeting normally is the first week of June)	Dean is given the opportunity to provide final input (clarifications and/or updates) relevant to the ADD for consideration by the Accreditation Board for the June decision meeting. This additional information should be received by the Accreditation Board Secretariat, at least, two weeks before the meeting.	Dean
June 20XX	Accreditation Board spring decision meeting is held in early **June**.	Accreditation Board
	Accreditation decision letter is prepared and reviewed.	Exec. Committee
	Accreditation decision letter is sent to the dean on **June 30, 20XX.**	Accreditation Board chair
July 20XX	Notification of decision(s) is sent to President of the institution.	Accreditation Board chair
August 20XX	Visiting team members are notified of accreditation outcomes(s) and are sent a reminder to destroy all documentation resulting from the visit still in their possession.	Secretariat
	List of accredited programs is updated for Accreditation Board report ending **August 28.**	Secretariat

A.2 Early re-visits

Please note: This calendar is an **approximate timeline** of events following the notification to the institution of the Accreditation Board decision to deny accreditation to a non-accredited program.

Date	Event	Action by
June 30, 20XX	Accreditation decision letter is sent to the dean on **June 30, 20XX.**	Accreditation Board chair
Within 60 days of receipt of notification of a denial of accreditation	The Accreditation Board Secretariat must receive a request for an early re-visit within 60 days of receipt of notification of a denial of accreditation. This request must be accompanied by details of positive changes that have been implemented. (See criterion 4.6.4 of the *Accreditation Board Accreditation Criteria and Procedures* report).	Dean/Designated official
Within four weeks of receipt of request for early re-visit	The Accreditation Board Executive Committee decides to accept or deny the request for an early re-visit. If the request for an early re-visit is accepted, normally a winter (i.e. January or February) accreditation visit is scheduled.	Accreditation Board Executive Committee
September	Pertinent information (blank questionnaire, etc.) is sent to the institution. The appropriate provincial association is notified of the request for accreditation.	Secretariat
	The Accreditation Board appoints the visiting team chair.	Accreditation Board Executive Committee
	The Accreditation Board Secretariat provides the team chair with the documents required to organize and conduct the visit.	Secretariat
	The team chair and the dean/designated official agree upon a visit date.	VTC chair & Dean/Designated official
	Program visitors are selected. Team member names are sent to Secretariat.	VTC chair
	Agreement on the Vice-chair and Program Visitors is received from the dean/designated official following a review for conflicts of interest and/or declarations/management.	Secretariat
October	The Accreditation Board Secretariat provides the visiting team members with the documents required to conduct the visit.	Secretariat
	Vice-chair and program visitors are sent and sign a confidentiality agreement regarding anything they	Secretariat & Team members

Date	Event	Action by
	learn as part of their duties as a visting team member.	
	In cooperation with the institution to be visited, the team chair establishes the visit schedule and informs all team members of these arrangements.	VTC chair & Dean/Designated official
December	Completed accreditation questionnaire is sent to team members and Secretariat and detailed syllabi, documentation of assigned work and assessments, and evaluated student work is submitted in electronic form (when possible) to the visiting team. This material is to be submitted at a time agreed upon by the Visiting Team Chair and the Program. (It must be received 8 weeks prior to the visit.) **If adequate documentation is not received as required, the Accreditation Board Executive Committee, in consultation with the VTC chair, may cancel the visit.**	Dean/Designated official
January	The accreditation visit takes place, normally over a three-day period. (For details of the on-site visit schedule see section 3.3 of this manual).	Visiting team
At the end of the visit	The team members are expected to submit their accreditation visit findings to the team chair no later than one week after the visit.	Visiting team
Four to six weeks after the visit	The team chair submits the consolidated issue tracker(s) to the Accreditation Board Secretariat.	VTC chair
	Evaluation forms for visiting team members are sent to the VTC chair for completion.	Secretariat
	Survey links to collect data as part of the Accountability in Accreditation initiative are distributed to HEI officials, students who participated in the visit, and all visiting team members.	Secretariat
	VTC report is sent to Accreditation Board Executive Committee for editing.	Secretariat/ Exec. Committee
	Edited VTC report is sent to VTC chair for review and comment.	Secretariat/ VTC chair
March	VTC report is sent to Dean for comment.	Secretariat
	Dean sends his/her comments on VTC report to Secretariat.	Dean

Date	Event	Action by
	Dean's comments are sent to VTC chair for his/her comments.	Secretariat
	VTC chair sends his/her response to the dean's comments to Secretariat, and Secretariat forwards it to the dean for information.	VTC chair
April	Accreditation decision dossier (ADD) is provided to Accreditation Board members.	Secretariat
June	The Accreditation Board meeting is held and the Accreditation Board makes accreditation decisions.	Accreditation Board
	The accreditation decision letter is sent by the Accreditation Board chair to the institution and the members of the team that visited the institution are informed of the decisions.	Accreditation Board chair
August	Visiting team members are notified of accreditation outcomes(s) and are sent a reminder to destroy all documentation resulting from the visit still in their possession.	Secretariat
November	The Accreditation Board report is published listing all accredited programs.	Secretariat

Appendix B: Procedures for visits to programs with feeder institution(s) and/or satellite unit(s)

1. Context
    a. Some engineering programs allow students to undertake part of their engineering programs at another institution or across academic units or campuses of the HEI granting the engineering degree. In this context, such locations will be considered either feeder institutions or satellite units.
    b. In keeping with the policy of minimum path, it is incumbent on the HEI to demonstrate that the programs of students attending either a feeder institution or satellite unit meet the accreditation criteria. The HEI must include complete information (e.g. data tables, course materials, work samples, GA/CI data) as part of the documentation submission to allow for a complete assessment of the program by the visiting team, including the components completed at the feeder institution(s) or satellite unit(s). According to the conditions and procedures detailed below, a visit to the feeder institution or satellite unit may be included as part of an accreditation visit.

2. Definitions
    a. Feeder institution: a separate institution from the HEI granting the engineering degree (degree-granting HEI) that delivers part of an engineering degree program on behalf of the degree-granting HEI, after which students will transfer to the degree-granting HEI.
    b. Satellite unit: an academic unit or campus of the degree-granting HEI that is outside of the control of the academic unit offering the degree program and which may be physically located at a distance from the academic unit offering the degree program, and where all or parts of the engineering program content can be delivered.

       Feeder institutions and satellite units are distinct from institutions from which the HEI grants transfer credits, since the courses taken at the feeder institutions or satellite units are considered to be part of the HEI's engineering program.

3. Conditions
   Typically, a visit (virtual or in-person) to a feeder institution or satellite unit will occur when any of the following conditions are met:

    a. Total Accreditation Units (AUs) offered at the feeder institution or satellite unit are equal to or greater than 925;
    b. Engineering Design AUs offered at the feeder institution or satellite unit are equal to or greater than 112;
    c. The visiting team chair, has determined through documentation submitted or discussion with the HEI, that there may be insufficient governance processes or documentation between the degree-granting HEI and the feeder institution or satellite unit or there may be issues with respect to the teaching and learning

environment at a feeder institution or satellite unit that warrant a visit to one or more of the feeder institution(s) or satellite unit(s).

4. Procedures
    a. In its Request for Accreditation, the HEI must disclose to the CEAB Secretariat 1) the nature of any feeder institution or satellite unit involvement in the program and 2) whether any of the quantitative conditions set out in (3) are met at any feeder institution(s) or satellite unit(s) and provide additional information regarding the conditions if necessary.
        i. The CEAB Secretariat will gather the information provided by the HEI and inform the visiting team chair of the situation, recommending an approach based on previous visit history and considering submitted documentation.
        ii. The visiting team chair will determine if the visiting team's assessment of the program would benefit from a visit to the feeder institution(s) or satellite unit(s), through discussion with the HEI and in consultation with the CEAB Secretariat.
        iii. The visiting team chair, in collaboration with the CEAB Secretariat, will refer complex situations that require further deliberations to the CEAB Executive Committee, which will determine if a visit is required at any or all the feeder institution(s) or satellite unit(s).
    b. **When it is determined that a visit to a feeder institution or satellite unit is not to be undertaken**, the visiting team chair will advise the HEI and inform them whether staff, faculty or students from the feeder institution(s) or satellite unit(s) will need to be present in-person or available virtually during the accreditation visit.
    c. **When it is determined that a visit to a feeder institution or satellite unit is required**, the visit logistics will be worked out among the HEI, the visiting team chair, and the CEAB Secretariat. See Appendix B of the *Manual of* Accreditation *Procedures* for complementary information.
        i. Composition of teams to visit feeder institutions or satellite units may take many forms, including but not limited to:
            1. Full visit with a complete accreditation team.
            2. Visit by a subset of the accreditation team.
            3. Visit by a single member of the accreditation team.
        ii. Timing of the visit to feeder institutions or satellite units may occur immediately prior to, coincident with or immediately following the accreditation visit.
    d. If a visit is required to a feeder institution or satellite unit located outside of Canada, expenses for the visiting team's travel to and from the location will be borne by the HEI seeking accreditation.

Appendix C: Visiting Team Qualification Rubric

Members of a Visiting Team (VT) are chosen based on their knowledge of the discipline of programs under consideration (in the case of PVs), their ability to work well with others as a team member, their ability to communicate effectively (particularly listen to others' opinions), their understanding the graduate attribute/continual improvement elements of programs (in the case of VCs), their experience with engineering education and understanding of accreditation in the Canadian environment and their experience with professional engineering in the Canadian environment. These qualifications may be evaluated by the VTC during a phone interview with potential VT members, particularly for prospective members of a VT who have limited prior experience as a member of a VT.

Visiting Team Position	Criteria	Does Not Meet (Unacceptable Candidate)	Meets	Exceeds (Preferred Candidate)
Program Visitor	Understanding of the content of the discipline to be assessed and understanding of Graduate Attribute/Continual Improvement process	No evidence of involvement in curriculum matters in the discipline to be assessed or previous negative-rated experience as a member of a Visiting Team	Evidence of involvement in curriculum matters in the discipline to be assessed or a strong interest in participation in an accreditation visit	Previous positively-rated experience as a Program Visitor
Vice Chair	Track record on visiting teams	Non CEAB members who don't have a record of positively-rated recent experiences as a Chair of Vice-Chair of Visiting Teams	A current member of the CEAB, or a recent member of the CEAB with record of positively-rated recent experiences as a Chair of Vice-Chair of Visiting Teams	A current member of the CEAB with a record of positively-rated recent experiences as a Chair or Vice-Chair

Visiting Team Position	Criteria	Does Not Meet (Unacceptable Candidate)	Meets	Exceeds (Preferred Candidate)
All members of Visiting Team	Team player	No evidence of team member skills	Previous successful experience working on a multidisciplinary team	Strong team membership (not leadership) skills, and collaborative leadership traits
All members of Visiting Team	Communication skills (listening, oral, and written) in language of institution	Difficulty communicating	Exhibits effective communication skills	Demonstrates strong communication skills, particularly an ability to listen to others perspectives without imposing judgement.
All members of Visiting Team	Understanding of Role of the Visiting Team in the Accreditation Process	No evidence of understanding the role of accreditation	Shows evidence of an understanding of accreditation and has completed, or will complete, the online training module	Demonstrates a strong understanding of the CEAB accreditation process and the role of the members of the visiting team
All members of Visiting Team	Licensure	Is not licensed to practice engineering in Canada	Is licensed to practice engineering in Canada	Is licensed to practice engineering in Canada

Appendix D: Conflict of interest declaration and Confidentiality Agreement

Conflict of interest declaration

Conflicts of interest (COI) are real, perceived, or potential situations in which the judgments and actions of individuals, Higher Education Institutions (HEIs), or other entities could be affected because of multiple or competing interests. Such competing interests can make it difficult for someone to fulfill their duties impartially. A conflict of interest exists even if no unethical or improper act results from it. A conflict of interest can create an appearance of impropriety that can undermine confidence in the person, the organization they represent, or the profession.

What is defined as a conflict of interest (or the perception of a conflict) can change depending on the circumstances. The below provides guidance but does not detail every possible situation. Disclosure must occur when, in the last six years, a Board member or any volunteer acting on behalf of the Accreditation Board:

- is a relative or close friend, or have a personal relationship with the students, faculty or staff at the faculty offering engineering programs, or
- is closely professionally affiliated with faculty, students, or staff at the faculty offering engineering programs, as a result of having
    - had frequent and regular interactions with students, faculty, or staff in the course of their duties at their own department or HEI, or
    - been a supervisor or a trainee of faculty, students, or staff, or
    - actively collaborated, published with faculty, students or staff, or have plans to do so in the immediate future, or
    - been employed or interviewed for a position by the HEI being visited, or
- feels, for any reason, unable to provide an impartial review of the program.

For example, recusal or disclosure should occur when a member of the Board, or any volunteer acting on behalf of the Accreditation Board, or their immediate family member in the last six years

- has been, is, or plans to be a student at the HEI, or
- has applied and been short-listed for or held any appointment at any time in the past at the HEI, or
- has been, is, or plans to be a collaborator, co-author, or co-applicant for funding with faculty, staff, or students at the HEI (a co-applicant on large inter-institutional applications which do not involve direct collaboration does not constitute a conflict), or
- has or had conflicts or relationships with faculty members, staff, or students at or with the HEI.

For more details, please refer to Appendix 11 of the latest Accreditation Criteria and Procedures available on the Engineers Canada website, or contact the CEAB Secretariat at visits@engineerscanada.ca.

I have read and understand the above policy. By agreeing to this statement, I confirm that I have no conflict of interest with the above-mentioned institution:

- o Agree
- o Disagree

Confidentiality Agreement

The role of the visiting team is to gather information on behalf of the Canadian Engineering Accreditation Board (the Accreditation Board) about engineering programs and to provide a report on the qualitative and quantitative aspects of programs identifying issues which may be of interest to the Accreditation Board. In the course of their work, volunteers access confidential information and, by signing this agreement, volunteers agree to maintain the confidentiality of the process.

Commitment:

As a volunteer on behalf of the Canadian Engineering Accreditation Board, I shall be bound and shall faithfully observe and abide by the Accreditation Board policies and procedures.

Confidentiality:

- I understand that as a volunteer of the Accreditation Board, I will have access to confidential material and information. In respect of that:
- I will respect the confidentiality of any materials and information that I deal with at all times before, during and after the accreditation and visit processes.
- I will access confidential information provided by the above-mentioned Higher Education Institution only as needed for the purposes of the accreditation review.
- In order to ensure the confidentiality of the accreditation and review materials, I will also assume responsibility for disposing (i.e. shredding hard copies, deleting electronic versions) of any confidential materials once decisions have been made by the Accreditation Board.

Privilege and Intellectual Property:

I understand that the CEAB policies and procedures are the exclusive property of Engineers Canada. I understand that documents produced in the course of an accreditation review contain information which is privileged and to be used only with the authorization of the Accreditation Board. I agree not to copy, disseminate or distribute any of the materials except as needed for the purposes of the accreditation review.

Signature of volunteer	Print name of volunteer	Date

Appendix E: Exit Statement Template

The following document should be used by the visiting team chairs to help craft their exit statement. The template can be shared with program visitors to facilitate the collection of information for the chair's use.

Standard statement for Report of Visiting Team's initial findings
(EXIT STATEMENT)

OPENING COMMENTS

This section will be tailored to each individual visit.

We have come to the end of *NUMBER* days of visiting your program*(s)*, and it is now time for me to present the findings of the visiting team.

First, I would like to thank Dean *NAME of dean*, *name the designated official if any*, *name the head(s) of each department/program as relevant*, as well as all the staff of the *Faculty/Department of NAME OF UNIT* for their warm welcome and their collaboration throughout the various stages of this visit. *(Name any others as appropriate)*

Next, I want to express my sincere appreciation for all members of the visiting team who have devoted many long hours both before and during the visit. *(Can name individually if desired)*

STANDARD STATEMENT

The indented text should be read as written.

I will start by reading a standard statement and then will present the team's findings.

> The purpose of this statement is to provide you with a summary of all issues related to accreditation that arose before and during the visit which have not yet been resolved. At this stage, I will be proving findings on behalf of the entire team and will not be taking any questions or engaging in discussion. However, when the final report is written, it will be sent to your Dean who will have the opportunity to respond. The final report with the Dean's response will then be used to arrive at an accreditation decision at the next meeting of the Canadian Engineering Accreditation Board (CEAB or Accreditation Board).
>
> Engineering accreditation is a voluntary process involving collaboration between the institution, Engineers Canada, the CEAB, and the members of the visiting team. The role of the visiting team is to gather information on behalf of the CEAB about engineering programs and to provide a report on the qualitative and quantitative aspects of programs and the environment at the institution, identifying issues which may be of interest to the CEAB. The

visiting team does not make any accreditation decisions or recommendations. An accreditation decision will be made by the Accreditation Board. The accreditation decision letter signed by the Chair of the Accreditation Board is the only official position of the Accreditation Board. Accordingly, any remarks by members of the visiting team must not be construed as indicating accreditation or the position of the Accreditation Board.

While an attempt will be made here to identify all of the issues arising from the visit, the Accreditation Board reserves the right, based on the final visiting team report, to correct any errors, omissions or misstatements that have been made by the visiting team.

The Accreditation Board treats the findings of the visiting team confidentially. The Accreditation Board urges the institution to treat the team's findings as confidential, pending receipt of the official accreditation decision.

FINDINGS RELEVANT TO ALL PROGRAMS [IF APPROPRIATE]

- Comment on **all** outstanding asterisks in the tracking of issues sheet, being sure to cite the relevant criteria numbers.
- Strengths
    - Comment on a few strengths of the programs (no need to mention all as they will be included in the final report)

PROGRAM-SPECIFIC FINDINGS

Program 1

- Comment on **all** outstanding asterisks in the tracking of issues sheet, being sure to cite the relevant criteria numbers.
- Strengths
    - Comment on a few strengths of the program (no need to mention all as they will be included in the final report)

Program 2

- Comment on **all** outstanding asterisks in the tracking of issues sheet, being sure to cite the relevant criteria numbers.
- Strengths
    - Comment on a few strengths of the program (no need to mention all as they will be included in the final report)

Program 3

etc.

CONCLUSION

The indented text should be read as written.

This concludes the exit statement for this accreditation visit. As a reminder, you will receive the report of the visiting team to which you will be invited to submit a response. Your follow-up input will be used in the CEAB's decision-making process. Timelines for this process will be confirmed when you receive our report from the AB Secretariat.

Thank you once again on behalf of the visiting team.

Appendix F: Focused accreditation visits

This appendix describes the terms, limits, conditions and other aspects of focused visits in relation to the accreditation process.

At the request of institutions offering engineering programs, the CEAB conducts visits and subsequently makes accreditation decisions. In making accreditation decisions, the Accreditation Board may identify issues of compliance against the accreditation criteria. Accreditation is granted for a specific period, with the following considerations:

- **No conditions (xV):** Accreditation duration is granted for x years, with no additional requirements.
- **Report required (xR):** Accreditation duration is granted for less than six years and may be extended subject to the submission of a report (xR, where x is the number of years accredited). Typically, a report is due 12 months before the end of accreditation. Accreditation may be extended beyond x years if the report satisfies the CEAB that comments, concerns, weaknesses, and deficiencies identified in the decision letter and its attachments have been adequately addressed.
- **Focused visit required (xFV)**: Accreditation duration is granted for less than six years and may be extended subject to the results of a focused visit (xFV, where x is the number of years accredited). Typically, a focused visit takes place in the year before the end of accreditation. Accreditation may be extended beyond x years if the focused visit satisfies the CEAB that comments, concerns, weaknesses, and deficiencies identified in the decision letter and its attachments have been adequately addressed.

According to CEAB policy, no more than six years may elapse between full visits. Thus, if a program receives a decision of xFV or xR, the maximum time a program can be accredited after an intermediate focused visit or report is limited to 6 minus x years. Focused visits do not replace regular visits but instead are an intermediate point on the pathway for a program to extend its accreditation status. As shown in the example below, the longest possible accreditation term is six years, with possible terms ranging from one to six years.



Image 1: **Example of a typical accreditation timeline following a full visit, an intermediate focused visit, or a report.**

The scope of a focused visit is narrower than a full accreditation visit because focused visits examine only those issues detailed in the decision letter. Normally, a focused visit is required when the Accreditation Board cannot adequately evaluate the actions addressing the issues in the decision letter via a written report from the program. Generally, issues are not reportable when they are deeply embedded in the nature of the program, and a visit is the appropriate approach to explore their impact and mitigation. This provides an opportunity for the visiting team to assess qualitative factors, such as the intellectual atmosphere, culture of safety, morale, professional attitudes, and the quality of staff and students.

Procedures for focused accreditation visits are similar to those for full accreditation visits, but with a narrower scope. This document highlights the key differences by following the same structure found in section 4, *Accreditation policies and procedures*, of the *CEAB Accreditation Criteria and Procedures*, which should also be referred to while reading this supplementary information.

1. Initiation and timing of a focused accreditation visit

The institution will initiate a focused accreditation visit by submitting a Request for Accreditation (RFA) to the Accreditation Board Secretariat by the date indicated in the decision letter and following the same process as a full accreditation visit.

2. Selection of the visiting team

The selection of the visiting team for a focused visit follows the same process as full accreditation visits. Typically, the team will consist of only those individuals needed to examine the specific issues of the visit. For example, the visiting team chair may choose to have only one visiting team member and designate this person as a vice-chair. The visiting team's composition will thus depend on the nature and number of the issues the visit will focus on.

3. Preparation for a focused accreditation visit

Several months before the date of an accreditation visit, the visiting team chair, in collaboration with the Accreditation Board Secretariat, will provide instructions to the institution as to what documentation is required for the focused visit. The institution will be asked to prepare for the visit with a specified scope. This scope will encompass only the issues identified in the decision letter, along with the criteria that are affected by those issues. For example, the institution may be required to prepare some or all of the following documentation:

- Updated sections of the Questionnaire that directly address the issues identified in the decision letter.
- Updated course information sheets for any courses flagged as problematic in the decision letter.
- Updated graduate attribute (GA) data if the issues identified in the decision letter involve insufficient collection, analysis, or reporting of GA data.
- Updated course materials that specifically address the issues identified in the decision letter, limited to courses relevant to those concerns.

It is essential to note that documentation outside the scope of the identified criteria should not be created or collected by the institution. The overriding principle is to limit documentation to the level necessary to adequately assess the specific issues for which a focused visit was deemed necessary.

Where practical, a focused visit to a program may be conducted concurrently with a full visit to other programs at the same institution. This would not affect the documentation requirements for the other program(s). If adequate documentation is not received as required, the Accreditation Board Executive Committee, in consultation with the visiting team chair, may cancel the visit.

4. Focused accreditation visit

An accreditation visit typically lasts 2.5 days. The duration of a focused accreditation visit depends on the scope of the issues identified in the decision letter, but will not exceed 2.5 days.

5. Visiting team report

Like full accreditation visits, the chair of the visiting team, working with the visiting team member(s), prepares a report on the program(s) visited. This is a report of the team's findings, which is tailored to the specific criteria evaluated on the visit.

If, during a focused visit, the visiting team identifies other findings that deviate from the scope of the criteria under review, they may note these in the additional remarks section of the visiting team report. While they may not result in a concern, weakness or deficiency, they may give rise to a comment in the decision letter.

6. Accreditation decision

The accreditation decision process follows the same process as described in the *Accreditation policies and procedures* section of the *CEAB Accreditation Criteria and Procedures*.