THE SELF STUDY:
PROCESS and PRODUCT

ABFSE

American Board of Funeral Service Education
Self Study is an essential element for Accreditation and re-accreditation

Self Study as a formal process

- Critically examines program structure and substance
- Evaluates program’s effectiveness regarding *each* of the Standards
- Identifies strengths and deficiencies
- Indicates where modifications and improvements are necessary
Self Study

- The Self Study process *results in*:
  
  a **Self Study document**

Self study is submitted electronically **via** [WEAVE]
Understand vocabulary

- Program Director / Program Coordinator
- Program v. institution
- Public / private
- Single purpose / multi-purpose
- Gatekeeper
- “Regionally” accredited / ABFSE accredited only
- Credit hour / quarter hour
Preparation for SS and site visit

Homework:
- Reading list (slide 8)
- WEAVE
From the reading list you will learn

- Self study (aka comprehensive review)
- Site visit
- How to prepare for both
Reading List

ABFSE Accreditation & Policy manual

- Chapter V – Accreditation procedures
- Chapter IX – Standards (effective 2020)
- Appendix B (fillable forms) Forms B-3, B-4, B-6 Possibly B-1 or B-2
Chapter V: The Accreditation Procedure
snapshot of the on-site visit and what happens after the Team leaves.

Chapter IX: READ AND RE-READ
the ABFSE Accreditation Standards must be addressed in the Self Study. Team will follow them as they visit your Program.

Current Standards took effect January 1, 2020
new Standards effective January 1, 2025
Accreditation Standards (13)

- Sponsorship, Organization & Administration
- Program Learning Outcomes
- Administrative Practices
- Finance
- Curriculum
- Faculty
- Facilities
- Library/Learning Resources
- Students
- Program Planning & Assessment/Evaluation
- Default rates
- Relative to Subject matter
- Length in Credit Hours
Appendix B: Has forms to attach to your Self Study - Forms B-3, B-4, & B-6.

- possibly B-1 or B-2, if applicable

Don’t overlook the “Curriculum Distribution by ABFSE Content” Form B-6 Review Standard 5 Curriculum for this

Appendix E: Required *if* you offer any course (or more) in a distance mode.
- established in October 2019
Form B-6 & Appendix E

Form B-6 is:
“Curriculum Distribution by ABFSE Content Area”
(Standard 5 - Curriculum)

Appendix E – if you offer course(s) via Distance Learning
Appendix B  (all submit)

- Form B-3
- Transmittal Form (with signatures)
- Form B-4
- Program and Institution Data Form (in Weave)
Some programs submit

- Form B-1
  Application for Candidacy

- Form B-2
  Application for Initial Accreditation
CANDIDACY

Read Chapter IV. It specifies the points you will need to cover, depending on the conditions under which you are applying. (see also Form B-1)

Fees in Appendix D
INITIAL ACCREDITATION
(follows Candidacy)

Read Chapter III.C, (begin pages 3-1), plus Chapter IX and Appendix B, C and E. (See also Form B-2)
THE SELF STUDY IS KEY

TO A SUCCESSFUL SITE VISIT
GETTING STARTED

- Begin early. It makes sense to give the process an academic year.

- Use a STEERING COMMITTEE.

- Do NOT try to do it all yourself.
STEERING COMMITTEE AT WORK
Steering Committee examples

- Get faculty, student and advisory group input on matters close to the program.

- Let the money gurus work on FINANCE Standard.

- Let the library staff do that Standard.

- Ask Student Services and Administration to do their part.
View Self study as an on-going process

not a once every 7 years event

When that happens (on-going process)

- Stress is minimized
- Programs improve
- Change comes in manageable increments
Welcome to Weave

To create a SS, think in terms of WEAVE

(electronic submission of SS)

Login to access your account

https://app.weaveeducation.com/login
Think in terms of WEAVE

- Description of compliance with each standard/sub-standard
- Questions to guide response(s)
- Provide evidence (attach/upload)
WEAVE simplifies creation of the SS document

- Weave provides focus for your responses
- Weave coaches you – when & what documents to upload
- Weave provides organization
- One Log-in/Password is necessary
- Support is available
WEAVE eliminates headaches

Table of Contents
Page numbers
Hot links
Separate Exhibits
Minimizes duplication
Hard copy
Expectations in Weave

- Respond to each standard and sub-standard
- Provide ‘evidence’ to document your statements
- Attach/Upload excerpts!!

For the team and COA, excerpts eliminate links to page 1 of a 50-page document with the needed info somewhere about page 27
EVIDENCE IS CRUCIAL
Suggestion

- Maintain (create) a folder to collect evidence.
  - Save individual files to be uploaded in response to questions in Weave. (documents, forms, .pdf excerpts, etc.)
  - Will simplify the upload process
1.4 The sponsoring institution must provide, or arrange for the provision of, all portions of the required curriculum including all

1.4.1 classroom, laboratory, clinical field experiences, and

Weave question(s) to answer

1.4.2 services necessary to support the curriculum in funeral service education as specified in the Standards.

Weave question(s) to answer
No links

- WEAVE is the repository of the SS.
- Access to the data must be available for future reference – reason for uploads/reason for no links.
- No hard copy is submitted. (school can print a hard copy for own use)
- In the old days (pre-JURA/WEAVE) links to external appendices and evidence were encouraged.
https://app.weaveeducation.com/login
Help with Self Study in WEAVE

- Call ABFSE office
  (816) 233-3747, Ext. 3
  (910) 471-4332
- Mike Landon
- help with ABFSE standards and WEAVE input

- need WEAVE help? (with the program)
  click on top ribbon
Self Study review/approval

- Mandatory
- Consult with M. Landon throughout the process
- Ask for review as a section is completed
- Do NOT wait till the entire SS is finished to ask for a review
- Mandatory Review at least 30 days prior to submission date
Results?

- Make the SS process work to improve your program.
DON’T LET THE SS TAKE YOU DOWN THIS RABBIT HOLE
SS realities

- Program Director typically pulls it together.
- PD acts as Quarterback to ensure that the right things are being done. Hands off assignments to the people best positioned to get the job done.
- Be sure to respond to each Standard
- N/A is appropriate sometimes, but *not* as an excuse
Remember: View Self study as an on-going process

_not a once every 7 years event_

When that happens

- Stress is minimized
- Programs improve
- Change comes in manageable increments
**External EDITOR**

- Review grammar, spelling, etc. for professional results. Be sure the language makes sense to an *outsider*.

- Review, don’t rely on *spleen* check!!

*Proof read.*

- Ensure that necessary *evidence* is provided.

- Missing parts complicate the site visit. Raises questions? What are you trying to hide?
Recommendation

**Sign-off**

Be sure necessary approvals are received.

ABFSE doesn’t care about *sign-offs*, but your Admin probably does. Don’t let approvals be reason for missed deadlines.

[This Photo](https://example.com) by Unknown Author is licensed under [CC BY-SA](https://creativecommons.org/licenses/by-sa/4.0/).
Yikes!!!!
IS THIS TORTURE?
IS THIS TORTURE?

• Only if you lose sight of the purpose of the self study process.

• Self study is intended to make you periodically reflect on the whole program, on the issues, forms, published materials, and processes that might be improved.

• Get other stakeholders involved!
THE HIT LIST: trouble spots

- **Standard 2**: failure to address Program Learning Outcomes.

- **Standard 10**: little on-going evaluation, sporadic collection of data, little use made of data.

- Write the assessment plan & USE it - demonstrate improvements made - connect to the Program Learning Outcomes
The Hits keep coming

- Affiliation Agreements
  - signed and current
  - ‘interruption’ clause (change)

- Preceptors
  - training
  - credentials

- Clinical program
  - site inspections
The Hits keep coming

- Faculty
  - original transcripts

- Curriculum distribution  B-6
  - does not require a course for every ABFSE outline, but evidence that outline content is covered

- Budget
  - adequate to support; not judging salaries

- Program Director
  - responsibility – chain of command, curriculum, preceptors
Complaints
- written (and resolution)

Library / Learning resources
- not counting books
- current holdings
- adequate access
- program participation in acquisitions?
- demonstration of use

emphasize all learning resources

Standards for gatekeepers 11, 12, 13
VIRTUES AND VICES

Feel free to tout the program’s STRENGTHS (with examples and evidence).

You can discuss FLAWS you’ve fixed and problems that you’ve discovered through the process that still need to be corrected. What are you doing about this?
The Self Study should consider the past, the present, and the future of your program.

Where will you be going in terms of the Standard? Is change on the horizon? Will you tinker with some aspect of your program to improve it? = Projection.

You can talk about it!
After completing the descriptive questions for the standard you are invited to provide a summary of the program’s compliance efforts. (optional).

This summary would include analysis of the effectiveness of practices with attention to strengths, weaknesses, achievements and problems etc.

Projection includes future plans to enhance strengths or correct weaknesses.
Distance Education

(23 of 58 programs had DE grads in 2022
32 of 58 offered some funeral courses via DE)

- When you offer 50% or more of your program via DE, COA approval is required
  (requires approval via Substantive Change; does not include adjustments due to the Covid response)

- SS has a DE version and response to DE questions is required if your program offers even 1 funeral course via DE

- Be sure you have the proper version of the SS.
APPENDIX C: Guide for the Self Study Process and Report

- Review Appendix C for basic recommendations
THE SITE VISIT:

- **A Team Chair** (an educator from a discipline other than funeral service, someone with administrative and accreditation experience).

- **A faculty member** with at least five years experience teaching/administering an ABFSE-accredited program.

- **A funeral service licensee** with at least five years of experience as a practitioner.
THE VISITORS COME TO LOOK
THE SITE VISITORS

- Expect to learn about a lot about your program through your Self Study *before* they arrive.

- Will focus on seeing evidence too bulky to include (case reports for seven years), on things difficult to prove (rapport) and on places (clinical sites) where written description doesn’t tell the whole story.
Typical site visitor assignments

- Team members collaborate to review standards:
  - Chair: 1, 3, 4, 10, 11*, 12*, 13*
  - Educator: 2, 5, 6, 7, 10
  - Practitioner: 4, 6, 7, 8, 9

- Team reviews SS in advance of the site visit

- May request additional evidence
What should you do for the visitors?

In consultation with the Team Chair,

- set up housing, ground transport, and meal arrangements for the Team’s stay.
- Collaborate with the Team Chair on a schedule in advance of the visit.
For the site visit

- Provide a **private** Team Room where all three can plug in computers; physical evidence should be here & organized.
- Need **internet access**.
- Identify a **different space for interviews** so the Team Room can be used at the same time.
Current On-site schedule
3-day event

- **Arrival/first afternoon:**
  tour selected clinical locations

- **Day two:** full day on site:
  - Interviews
  - Prepare final draft of team reports

- **Day 3:** exit briefing;

  Final day: afternoon fly out (ideal).
Current On-site schedule

- Sunday arrival – Tuesday departure has been traditional (Tu-Th; M-W, W-F??)
- Students, faculty, administration, etc. must be available for interviews
  - Advisory Board members, too
- Set schedule accordingly
Current On-site schedule

- Must factor travel time
- Coordinate arrival of team members
  Return to airport
- Multiple offerings/degrees require more time to evaluate
  e.g. degree + diploma; Assoc & Bachelor; Distance Ed offering
YOU’LL KNOW THE RESULTS

- Visit concludes with an exit interview, the team will share their findings.

- If the visit *discovers* something, you will have time to begin fixing it before you see the COA.
After the site visit, WHAT’S NEXT?

- Within 30 days: the Team Report goes to the ABFSE.

- Within 45 days: the ABFSE Executive Director submits the Report to the chief administrator of the institution/program.

- The institution/program has the opportunity to comment on the Report and to file materials addressing the facts and conclusions in the Report before the Committee on Accreditation (COA) meeting takes place.

- At the appropriate COA meeting, the program/institution has opportunity to address the COA before COA makes its decision on accreditation.

- (note: COA meets April & October)
Remember

- Site visit team is ‘eyes and ears’ for COA
- They do **not** make accreditation decisions
- They prepare a report

Accreditation decisions are made by the COA!!!!
THE PROGRAM DIRECTOR, NOW THAT IT’S OVER
Extra slides follow.

- Issues/questions that consistently arise.
The program/institution must provide evidence that it assumes responsibility for

1.1.1 curriculum content,
1.1.2 classroom teaching and clinical education,
1.1.3 appointment and evaluation of faculty,
1.1.4 policies and procedures for admission, and ...
Organization/administration, etc.

- Program Director:
  - Responsibility and employees that report directly or indirectly
  - Academic background
  - Release time

- “Regionally” accredited vs. ABFSE as sole accreditor
Program Learning Outcomes (Standard 2)

- Must have.
- Must evaluate.
- Can add more than those in manual, but do not delete.
Administrative practices and ethical standards

- Be sure that publications and advertising accurately portray the realities of the program/institution.
- Proper accreditation statement.
- Proper references to any non-accredited programs are prescribed.
- Written policies for complaints (includes reporting to ABFSE and follow-up)
“The learning resources budget shall be adequate for proper support of the curriculum.”

“Acceptable accounting practices must be employed and the most current audited financial statements must be provided.”
Curriculum

- Curriculum distribution (form B-6).
- Evidence of the embalming technical competence of each graduate.
- Off-campus clinical sites (embalming & funeral directing)
- On-campus RA
- Funeral Directing tasks
Faculty

- Faculty credentials, licensing and certifications
- Preceptor credentials
- Student-teacher ratios (30:1; 25:1; 5:1)
Facilities

- Each program must maintain an on-campus embalming/preparation space either fully functional or for demonstration purposes. The embalming space must be of sufficient size to accommodate at least one preparation table. It must have an electric embalming machine, instruments, and real or simulated chemicals. In the case of a demonstration lab, it must adequately reflect an actual functional embalming laboratory.
Facilities

- Funeral homes in which off-campus instruction takes must be licensed by the appropriate authorities; (proof)

- Off-campus instruction must take place in locations which offer adequate learning space for students involved. In the case of embalming instruction, preparation room facilities must be of sufficient size to allow for satisfactory participation by each student involved; (inspections)
Facilities

- All facilities must satisfy federal, state, and local regulations. *(inspections)*

- Must have written affiliation agreements with *each* off-campus instructional site. Agreements must specify the responsibilities of the program/institution and the instructional site relative to supervision and instruction of students and liability. Personnel at the instructional site *may* be given adjunct faculty appointments by the institution.
Library/learning resources

- Learning resources must be accessible to students outside of regular classroom hours. The program must require student utilization of these resources.

- An acquisition policy relevant to Funeral Service Education must be in place and funeral service personnel must be involved with the annual acquisitions related to this program.
Students

- Evidence that students in the program meet ABFSE minimum admissions requirements.
- Must have written policies and procedures ensuring safety of its students.
- Must provide opportunities for student involvement in program and institutional governance.
The concept of program planning and assessment has at its core a documented plan to measure program effectiveness and implement necessary improvements.

This plan will incorporate guidelines, procedures and methodologies of planning and assessment and ensure instructional quality and student outcomes.
Planning & assessment

- Ongoing system of planning and assessment must include the following:
  - Provisions for collecting, maintaining, and analyzing data since last comp review. (7 yrs)
  - Opportunities for continuous feedback by students, faculty, and other constituents.
  - Regularly scheduled student evaluations of courses and faculty.
  - Regularly scheduled supervisory evaluation of faculty and program administrators.
Results of annual surveys of graduates and employers to include satisfaction with instructional quality, preparation for employment, and expectations of employment;

Methods used to measure the attainment of expected instructional outcomes; and

Documentation of how the assessment efforts are used to improve instructional and program quality.

AND NBE scores, graduation rates and employment rates.
If the program has been evaluated previously by ABFSE, the program must document what has been done since the last review to correct any deficiencies that may have been cited in reference to the Standards.
Appendix B has forms to submit with the Self Study. *Fillable* versions are available.

Appendix C has suggestions for compiling the Self Study plus a “heads up” on useful evidence to include or have ready on site.

If you have **ANY** courses offered via *distance*, review *Appendix E*. DL questions are included in WEAVE – if not, you got the wrong version of the SS.
THE PRODUCT: your Self Study and its Evidence

THE GOAL of SS

- Demonstrate/document that the PROGRAM covers the Standards.
- Include EVIDENCE to support what you say.
- BE HONEST. If you find a flaw, project what you are doing to FIX it. It is OK to celebrate your strengths.
https://app.weaveeducation.com/login