

Preparing for COA Accreditation

Deciding to seek COA accreditation should be made with the full knowledge that it is a rigorous process requiring a commitment of resources – financial and personnel – and a willingness to review all aspects of an organization’s governance, management and service delivery.

Recommended steps prior to beginning the process:

- Contact COA’s Client Relations Division to determine whether COA accreditation is appropriate for your organization.
- Visit www.coacanadastandards.org to browse through COA’s standards and learn more about best practices in your human service field.
- Visit www.coanet.org to gain information and an understanding of COA.
- Discuss the process, the standards and the commitment that is required to achieve COA accreditation with all of your stakeholders.
- Inform your governing body that COA accreditation is an important tool that assists them in meeting their fiduciary responsibility.
- Explain to your staff that pursuing COA accreditation validates their dedication to organizational excellence.
- Tell your consumers that COA accreditation affirms your commitment to providing the very best services and that when it comes to their needs, good enough is not good enough.
- Review the Statement of Organizations’ Rights and Responsibilities.

A. COA’s Accreditation Process

- Engages an entire organization – board, staff, consumers and senior leadership.
- Utilizes standards that set forth a range of appropriate best practices and emphasize client rights and essential life and safety practices.
- Reviews and accredits your entire organization in the context of your governance, management and service delivery.
- Provides an Accreditation Coordinator as a “go to” person throughout the entire process and is your problem solver, coach and – when necessary – advocate.
- Provides a customized, up-to-date and interactive [web-based format for the standards](#). This tool provides the organization the opportunity to view and share with other staff in the organization the standards it will need to implement and provides a forum to easily communicate about these standards with COA.
- An Accreditation Agreement that sets forth what you can expect of COA and what COA can expect of you.
- A self-assessment of your organization’s strengths and opportunities for growth using the standards as a benchmark.
- A broad range of regional and electronic training and technical assistance options.
- A focus on your organization’s role and relationship in building individual, family and community strengths.

B. 7 Key Activities

1. Application	COA's Client Relations Division provides an overview of the accreditation process, details the cost of accreditation and describes your rights and responsibilities as a COA "partner in excellence." The accreditation process typically takes 12-18 months to complete depending on the readiness of the organization as well as its dynamics with respect to size and the number of programs.
2. Establishing Your Context	Based on the completion of your in-depth Organizational Profile and Assessment of Organizational Capacity, both designed to capture key information about your organization, COA creates a customized road map – a timeline for the completion of your organization's accreditation – and identifies areas where you would benefit from technical assistance. The service sections that will be included in your organization's review are also determined at this time.
3. Self-Study	<p>With the guidance of your Accreditation Coordinator, you will complete a Self-Study that serves as a self-assessment tool to evaluate your strengths and opportunities based on appropriate governance, management and service delivery standards. The Self-Study is completed and can be submitted in either hard copy form or electronically on CD-ROM.</p> <p>You can elect to submit your Self-Study in two phases: first the administrative and management sections and then the service sections. This approach gives the Accreditation Coordinator the opportunity to provide valuable feedback while the document is still being completed.</p>
4. Site Visit	Approximately three months after your organization submits its Self-Study, you are visited by a team of specially trained Peer Reviewers. Having already reviewed your Self-Study and discussed the context of your organization with you and your Accreditation Coordinator, the Peer Reviewers are well prepared to meet with you, your staff, your clients and your governance leaders to verify and clarify the level of implementation for all of the applicable standards.
5. Pre-Commission Review Report and Organization's	After your site visit, you will receive a Pre-Commission Review (PCR) report, which summarizes the most important findings from the site visit. The PCR report is an organization's site visit report and identifies only

Response	<p>those standards that require a response and/or corrective action in order for the organization to achieve accreditation. The PCR also includes detailed recommendations that your organization can use to respond to and correct any standards for which the Peer Team did not observe evidence of implementation.</p> <p>The report and your organization's response are sent to COA's Accreditation Commission for review.</p>
6. Accreditation Commission Review	The Accreditation Commission reviews the report and your response to the report and makes a decision to accredit your organization, request additional information or deny accreditation.
7. Final Accreditation Report	A Final Accreditation Report details your organization's strengths and areas for improvement. This report is sent to your organization within 45 days of formal notification of your accreditation. It does not affect your accreditation status and is intended to serve as a guide in strengthening non-critical areas.

C. Ten Tips on Getting Started

Tip 1. Read the "Guidelines to COA Accreditation"

This important document contains most of what you need to know about COA's expectations and about the accreditation process. The Guidelines are available online at www.coacanadastandards.org. COA recommends that all staff involved in helping produce the self-study document make themselves familiar with the Guidelines.

Tip 2. Get Started Right Away

Don't wait! Start reviewing the standards and evidence of implementation to begin your self-study process. Take advantage of COA's complementary self-paced trainings and webinars on the standards at www.coanet.org.

Tip 3. Determine As Soon As Possible Those Areas Where the Organization Has Already Implemented Best Practices and Where Changes Need to be Made

Some organizations find that they have already implemented many of COA's standards. Others find that while their day-to-day practice conforms with COA standards, they need to formalize much of what they do into policies and procedures. Still others find that they must both modify their practice or implement new processes, codifying these into policies and procedures. COA recommends that you begin this work immediately as organizational and cultural change takes time.

Tip 4. Get Organized

COA recommends that the organization begin the self-study process by creating a committee that, along with the chief executive officer or designee, will plan and coordinate the preparation of materials for the self-study and site visit. The committee should include representation from the governing body, advisory boards, if any, and personnel. It may be efficient to divide staff into subcommittees or to use existing committees to help prepare accreditation materials.

Tip 5. Start with Performance and Quality Improvement (PQI)

Insufficient implementation of PQI practices is the most common reason for a delay of an organization's accreditation decision. Frequently, this is because implementing PQI processes involves making a cultural change within the organization, which can take time. Many organizations do not have many of the required processes in place prior to applying for accreditation and then wait too long before turning their attention to this vital section. COA offers various PQI trainings, webinars and resources at www.coanet.org that can help your organization begin to put in place or enhance your PQI infrastructure.

Tip 6. Read the Training and Supervision Section (TS) and Decide How You Want to Set Up Your Training Program

The training standards in TS can be met in a variety of ways: a formal, didactic in-house training program; full outsourcing of training; use of supervision as the primary training method; or a combination of all three. Whichever model or hybrid you choose, implementation of the standards depends on documenting that training is taking place and that your training program has been formalized.

Tip 7. Pay Extra Attention to Fundamental Practice Standards

The Canadian Organizations 8th Edition Standards offer guidance on standards that are fundamental to quality practice. By identifying and categorizing these fundamental standards, it is our goal to help the organization strengthen and integrate practices in these areas across all standard sections. COA expects that such standards would be implemented immediately.

These standards are organized in three categories:

Essential Life and Safety Standards

COA considers standards indicated as Essential Life and Safety to be basic to maintaining the life and safety of individuals who receive human services.

Health and Welfare Standards

Practices indicated as Health and Welfare are vital for the protection of consumers, personnel and visitors, and they promote a hazard-free service environment and the prevention of harm, injury or ill health.

Clients Rights Standards

Practices indicated as Client Rights are vital to maintaining a service and work environment that is fair, equitable and free of discrimination.

Tip 8. Attend a COA-Sponsored Training, If Feasible

Many organizations report that attending accreditation training offered by COA's Training Division helped answer many of their questions and subsequently put them on the right track. These training sessions also provide a wonderful opportunity to network and have mutually beneficial conversations with individuals from other organizations who are also pursuing accreditation.

Tip 9. Address All Potential Not-Applicable (NA) Ratings

The organization should never decide on its own that a standard is not applicable unless a rating of NA is explicitly permitted. Please use the NA Request Form, listed as a related file in every section of standards on the website, to inquire about an exception to a standard that is not explicitly permitted in the rating indicators.

Tip 10. Check COA's Standards Website for Updates and Other Useful Documents

COA's standards website - www.coacanadastandards.org – includes detailed information and tools for the accreditation process. The Accreditation Guidelines include many valuable resources and documents to guide the organization in preparing for accreditation.

Bonus Tip

Read about the MCFD mentoring program on the [MCFD website](#) and then contact [Jessica Wilner](#) for more information on how to arrange for a mentor.

D. Tables of Evidence

The Table of Evidence is organized into a chart that outlines the necessary evidence the organization is required to provide in order to demonstrate implementation of the standards. This includes a written Administration and Management, Service Delivery Administration or Service Narrative, relevant attachments to support the narrative, applicable forms and charts, Self-Study documents, on-site documents and on-site activities.

The organization uses the Table of Evidence and the narrative templates in the Related Files as a guide to assemble the Self-Study and prepare for the on-site visit.

E. Worksheet for Preparing for COA Accreditation

Pre-Application			
Steps	Who's responsible? (e.g., managers, board, E.D., staff)	Process (e.g., meetings, notes, CD-ROM)	Timeframe for Task Completion
Ensure buy-in by orienting key groups			
Participate in COA training, available in many different formats			
Submit application to COA 12-18 months before desired review date			
Planning			
Steps	Who's responsible? (e.g., managers, board, E.D., Staff)	Process (e.g., meetings, notes, CD-ROM)	Timeframe for Task Completion
Designate a coordinator and assign work to appropriate staff or teams of staff			
Prepare and orient staff to COA's accreditation process			
Take the self-paced online trainings on the standards, available on www.coanet.org			
Begin to evaluate implementation of the standards and identify areas in need of improvement			
Review timetable and accreditation agreement upon receipt from COA			
Review the assigned service sections and verify that they fit			
Circulate accreditation materials - all involved staff should review the "Guidelines"			

Self-Study and Preparation of the Self-Study Document			
Steps	Who's responsible? (e.g., managers, board, E.D., Staff)	Process (e.g., meetings, notes, CD-ROM)	Timeframe for Task Completion
Assign responsibility for all standards sections			
Regularly update staff on activities and progress toward achieving accreditation			
Assemble evidence of implementation with individual standards			
Regularly check COA's standards website for updates			
Arrange for a mentor			
Disseminate questionnaires			6 months prior to site visit
Assemble self-study document according to instructions in the "Guidelines"			
Submit drafts of chapters to your COA Accreditation Coordinator in advance for feedback			
Send self-study document to COA			3 months prior to site visit
Following "OK" by COA, send copies of the self-study document to the review team			
Preparing for the Site Visit			
Steps	Who's responsible? (e.g., managers, board, E.D., Staff)	Process (e.g., meetings, notes, CD-ROM)	Timeframe for Task Completion
Continue to work on implementation of the standards			
Conduct a mock site visit to help staff prepare for			

the site visit			
Prepare and organise on-site documentation			
Work with team leader to establish schedule of events for the site visit			
Finalize site visit arrangements with the team leader			
The Site Visit			
Steps	Who's responsible? (e.g., managers, board, E.D., Staff)	Process (e.g., meetings, notes, CD-ROM)	Timeframe for Task Completion
Ensure that key staff are available while the review team is on site			
Designate a quiet room or area where the review team can work undisturbed			
Ensure that on-site documents are organized and readily available to the review team			
After the Site Visit			
Steps	Who's responsible? (e.g., managers, board, E.D., Staff)	Process (e.g., meetings, notes, CD-ROM)	Timeframe for Task Completion
Upon receipt, review the Pre-Commission Review Report and prepare a response			
Respond to COA requests for more information, as applicable			
Notify staff, the board and other stakeholders of your accreditation decision			
Develop a plan to address the areas for growth and improvement identified in the Final Accreditation Report			

For more information about COA's accreditation process please visit the main [COA website](#). For additional information on COA standards, please see [the Canadian standards website](#).

If you are interested in applying for accreditation, please contact Joseph Seoane, Director of Client Relations, by email at jseoane@coanet.org or by phone at (212) 797-3000, ext. 263, or toll-free at (866) 262-8088, ext. 263.