

**Program Review Timeline and To-Dos Checklist**

**Department:**

**Date of Review:**

**Key Contacts:**

Director:

Admin Support:

External Review Team Lead:

***Note:*** All appendices are found in the [Student Life Program Review Guidelines](https://dslassessment.utk.edu/wp-content/uploads/sites/62/2020/02/Program-Review-Guidelines-2019_03.09.21.pdf)

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| **Timeline and To-Dos** |
| **Twelve months before:** * **DASI.** Schedule program review kickoff meeting with director(s).
* **Director.** Email DASI the preferred dates for program review (Sun/Mon/Tues)
* **DASI.** Confirm dates with director after verifying with Vice Chancellor, Associate Vice Chancellor or the assigned Assistant Vice Chancellor. DASI will send 3 calendar invites:
1. Kick-off Meeting - Sunday @6p
2. Senior Leadership Breakfast – Monday @8a
3. Preliminary Oral Report - Tuesday @2p
* **Director.** Send general announcement email notifying leadership team and department staff of program review dates (See [Appendix P](https://dslassessment.utk.edu/wp-content/uploads/sites/62/2020/02/Program-Review-Guidelines-2019_03.09.21.pdf)).
* **Director.** Budget travel expenses for the external program review team in budget reviews (The Office of the Vice Chancellor will support the taxable honorariums).

 **Six months before:*** **Director.** Send list of 5-7 proposed external reviewers to DASI for approval ([Appendix F](https://dslassessment.utk.edu/wp-content/uploads/sites/62/2020/02/Program-Review-Guidelines-2019_03.09.21.pdf)).
* **Director.** Once approved, the department director contacts the top three reviewers to gain verbal consent and inform them that the DASI will contact them in the next week with more information.
* **DASI.** Secure agreements from the top three external program reviewers through Zoom conference.

**Five months before:*** **Director/DASI.** Department orientation meeting with staff ([Appendix D](https://dslassessment.utk.edu/wp-content/uploads/sites/62/2020/02/Program-Review-Guidelines-2019_03.09.21.pdf)). Create department Self-Study outline in Compliance Assist.
* **Director/Staff.** Determine what standards will be used to for Self-Study.
* **Director.** Send preferred outline for Compliance Assist on word document. Assign portions of Self-Study to the various parties for completion.

**Three months before:*** **Director.** Submit list of stakeholder meetings for the site visit itinerary ([Appendix I](https://dslassessment.utk.edu/wp-content/uploads/sites/62/2020/02/Program-Review-Guidelines-2019_03.09.21.pdf)). Plan the group self-study rating exercise.
* **DASI.** Set date for completion of documents in Compliance Assist (Self-Study and executive summary are sent to EPRT three weeks prior to site visit).

**Two months before:** * **Director / DASI.** Finalize virtual or on-site visit itinerary.
* **Admin.** Email calendar invites for interview sessions with stakeholders (See [Appendix Q](https://dslassessment.utk.edu/wp-content/uploads/sites/62/2020/02/Program-Review-Guidelines-2019_03.09.21.pdf))
* **Admin.** Reserve locations for EPRT to meet.
* **Admin.** Reserve hotel room(s) for EPRT.
* **Admin.** Reserve plane ticket(s) for EPRT, if applicable.
* **Admin.** Have the EPRT members complete the contractual paperwork for honorarium (Office of the Vice Chancellor).
* **Admin.** Request NetIDs for EPRT from OIT to access Compliance Assist two weeks prior to the site visit (Office of the Vice Chancellor).

**One month before:*** **Admin.** Make meal arrangements for on-campus dining (dining.utk.edu/catering 4-4111).
* **Director.** Confirm Self-Study and Executive Summary ([Appendix H](https://dslassessment.utk.edu/wp-content/uploads/sites/62/2020/02/Program-Review-Guidelines-2019_03.09.21.pdf)) are ready for DASI review (four weeks prior to the site visit).
* **DASI.** Provide suggested edits/approval will be provided by the DASI and AVC within one week. Email the final site visit itinerary to department director, EPRT, VC, and AVC (Upload to Compliance Assist-Document Directory).

**Two weeks before:** * **Director.** Confirm completion of review materials in Compliance Assist and notify DASI for final review.
* **DASI.** Send materials to EPRT (itinerary, campus map, Knoxville Visitor Sheet, and link to Self-Study in Compliance Assist).
* **Admin.** Prepare EPRT swag bags (hotels rooms) and folders for on-site review team and in the Document Directory in Compliance Assist (itinerary, executive summary, recommendation report from previous program review, organization chart, budget sheet, and key contact information) and folders for VC, AVC, and DASI (itinerary, executive summary, review team bios, previous review recommendations).

**Gearing up to the day of:*** **Admin.** Confirm meeting spaces - be intentional about room configuration in advance.
* **Admin.** Call one day prior to confirm refreshments.
* **Admin.** Supply pens/pencils and notepads.
* **Admin/Director.** Confirm airport pick-up and Sunday dinner arrangements if applicable.
* **DASI.** Provide QR code for interview participants to share anonymous feedback with the EPRT.

**Follow-up:*** **DASI.** Thank you emails within a week reminding EPRT of report deadline.
* **VC Office.** Pay taxable honorariums after receipt of EPRT report (One month after on-site visit).
* **Director**. Schedule meeting with VC and AVC to discuss response report and action plan following the receipt of the EPRT Final Report.
* **Director.** Prepare Department Response Report ([Appendix H](https://dslassessment.utk.edu/wp-content/uploads/sites/62/2020/02/Program-Review-Guidelines-2019_03.09.21.pdf)) and Implementation Plan and Tracking Sheet ([Appendix N](https://dslassessment.utk.edu/wp-content/uploads/sites/62/2020/02/Program-Review-Guidelines-2019_03.09.21.pdf)) within 1-2 months of receiving the EPRT report.
* **Director.** After the Response Report is completed, the director will share the EPRT report and action plan with staff and/or stakeholders. (See [Appendix O](https://dslassessment.utk.edu/wp-content/uploads/sites/62/2020/02/Program-Review-Guidelines-2019_03.09.21.pdf)).
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