Program Review Guidelines

Updated April 2024

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Introduction
The departmental program review enhances the mission of the Division of Student Life by allowing departments to assess, share, and improve their impact and services. Each review enables departments to evaluate strengths and weaknesses, empowering them to act. The External Program Review Team (EPRT) consists of experts who evaluate the department and offer feedback to enhance programs and services. The team’s insights allow for comparisons to other institutions. They use the department’s Self-Study for on-site visits and provide new perspectives and ideas. Their recommendations are crucial for short-term and long-term planning. The EPRT’s main responsibilities include reviewing materials, responding to observations, providing recommendations, and bringing fresh insights to the review processes. All review components will be handled through the HelioCampus solution.

UT and Student Life Mission Statements

The University of Tennessee, Knoxville Mission Statement
We are a diverse community with a shared commitment to discovery, creativity, and education. At UT Knoxville we: Empower learners of all ages and backgrounds to achieve their dreams through accessible and affordable education; Advance the prosperity, well-being, and vitality of communities across Tennessee and around the world through our research, teaching, service, and engagement; and commit to excellence, equity, and inclusion within the university, across the state, and in all our global activities.

The Division of Student Life Mission Statement
Guided by the Volunteer Sprit, the Division of Student Life provides inclusive pathways for students to learn, lead, and serve.

Program Review Process
The departmental program review is a collaborative process that benefits the university, the Division of Student Life, and the department under review. It allows departments to assess, share, and enhance their impact, services, and quality of work. Conducted every five years, each review prompts departments to thoroughly evaluate their strengths and opportunities for improvement, facilitating future planning. This process empowers Division of Student Life departments at The University of Tennessee to continuously enhance their work by critically analyzing its effects on the campus and community.

Program Review Goals
• Identify strengths, opportunities, and aspirations through both the planning process and the contributions of the External Program Review Team (EPRT) recommendations and celebrations
• Evaluate the unit’s assessment practices and effective measurement of student
learning and program outcomes

- Support the university’s commitment to institutional effectiveness and the expectations of Southern Association of Colleges and Schools commission on Colleges (SACSCOC)
- Provide an overall understanding of the contributions of the department to the mission and goals of both the university and division
- Initiate and develop department strategic planning for both short- and long-term planning processes
- Provide evidence to assist departments in reallocation of department resources

All departments are encouraged to participate in the following steps to ensure a consistent, thorough, and efficient program review process:

**Phase 1: Pre-Review**

**I. Notification of Program Review**

The Director of Assessment and Strategic Initiatives (DASI) will contact department directors at least one year before the scheduled program review to determine preferred program review dates and schedule a preliminary planning meeting. Reviews are held every five years, unless otherwise determined. Please see Appendices A & B for the most up-to-date program review schedule and timeline. Please see Appendix C for the role of the DASI.

**II. Program Review Kickoff Meeting**

The department director and DASI will meet to review the program review guidelines, roles, Self-Study protocol, and overall process. This meeting will be a time to go over any questions or concerns the director may have. Please see Appendix D for sample meeting agendas and follow-up emails.

**III. Development of the Self-Study**

The department director will identify the most appropriate Self-Study protocol based on the department's needs. The following are typical Self-Study protocol options:

A. *CAS Self-Assessment Guides.* If applicable, the protocol should be inclusive of CAS Standards and the CAS Self-Assessment Guide(s) most closely related to the department participating in the program review. These can be acquired from DASI. Please see Appendix E for Self-Study Guidelines.

B. *Any mandatory or pre-existing professional accreditation process.*
   
   Certain departments are required to participate in accreditation processes. As such, these units may use some or all of the pre-existing professional
accreditation processes to complete the executive summary. These departments will work with their Associate Vice Chancellor and the DASI to report outcomes to the Division of Student Life.

IV. Formation of the External Review Team

The External Program Review Team (EPRT) will consist of 3 external experts in the field of work most closely aligned with the mission and purpose of the department under review. To form the EPRT team, the department director will first compile a list of 5-7 experts/leaders in the area of review (Appendix F). The department director will then work with the appropriate Associate or Assistance Vice Chancellor (AVC) and the DASI to identify the review team members and appoint the lead reviewer.

The following criteria will be considered when identifying external reviewers:

The reviewer must have experience as a staff member in a similar program at another institution or oversee the program in review.

Experienced reviewers with national reputations in their fields should be selected.

Reviewers should be available for selected dates of review and able to return their findings by the suggested deadline (one month from the final day of visit).

Based on the criteria above, the process for forming and selecting the reviewers is as follows:

1. The department director will compile a list of at least five potential external reviewers, including reviewer names, current position/employer, and rationale for their inclusion (see Appendix F for Reviewer Proposal Form).
2. The department director will work with the AVC and DASI to identify the “Lead” reviewer for the EPRT (see Appendix G for External Review Team Roles & Responsibilities). The department director will extend an invitation to identified members to serve on the review team through a phone call or an email. During this verbal consent, the director will inform the prospective reviewer of follow-up contact by the DASI.
3. The DASI will extend formal invitations to all identified members to participate in the review through an e-mail requesting a Zoom shortly thereafter.
4. The department administrative support member will coordinate all logistics regarding their visit, including travel, agenda, hotels, meals, campus tours, and all future communication about logistics leading up to their arrival. The department will also need to decide if the reviewers will conduct the visit remotely or on-site.
**Phase 2: Self-Study**

I. Data and Artifact Collection

The department director and members of their staff should collect all relevant data and artifacts to help tell the department’s story to external reviewers. Data collected may include pre/post assessment data, usage numbers, fiscal data, qualitative data, etc. Artifacts may include any relevant printed publications or reports such as the department strategic plan and/or Impact Report. These will be integrated into the Self-Study, which will be shared with the EPRT (via the DASI) prior to the team’s arrival on campus.

II. Development of the Self-Study

Each program review begins with a Self-Study. In most cases, the Self-Study may be based upon existing data, but it may also require the collection of new data to assess concerns such as customer satisfaction, student learning, retention & persistence, etc. Where available, professional standards established for the field should be incorporated.

Each department will prepare an in-depth Self-Study prior to the EPRT site visit. The Self-Study will be entered into HelioCampus.

Additional resources or supporting documentation may be included in the Self-Study using hyperlinks within the text in HelioCampus. To the extent possible, the above guidelines should be addressed with supporting data within HelioCampus. In some areas, professional associations may have already developed detailed standards for department review. In such cases, the Self-Study and site visit should incorporate these guidelines and criteria. A detailed description of each section of the Self-Study is included in Appendix E.

OASI has developed common CAS standard language with resources for the standards that address IV. Assessment, IX. Ethics, Law and Policy, X. Financial Resources, XI. Technology, and XII. Facilities and Infrastructure. These resources can be accessed through OASI via e-mail.

III. Self-Study Submission

The department director will alert the DASI and assigned AVC when the Self-Study has been entered into HelioCampus with all sections rated no later than one month before the site visit. Once approved, the DASI will then share the Self-Study with all members of the EPRT at least three weeks prior to the site visit.

The director will be added to the Executive Leadership Team (ELT) meeting prior to the on-site visit to share self-study findings in preparation of the on-site visit. This meeting will ensure that the ELT is aware of the findings for discussion during the ELT breakfast with the EPRT.
IV. Executive Leadership Presentation

The director will work with their supervising assoc/assistant vice chancellor to schedule a presentation for the executive leadership team prior to the on-site visit. The director will give an overview of findings from the self-study highlighting successes and opportunities for improvement based on the self-study ratings of compliance.

Phase 3: External Review Team Site Visit

A team of external reviewers will conduct a two-day on-site review. The EPRT should consist of up to three external reviewers that have not been previously employed by the department under review. Reviewers should be familiar with the division and department's work and/or the department undergoing review. The external reviewers should be viewed as experts in the field and/or functional areas, and their role as reviewers is to provide expert, unbiased, professional opinions regarding the performance of a particular department after extensive research and interviews conducted during and before their site visit. The department under review will be responsible for funding the costs associated with the EPRT's travel (i.e. meals, flights, etc.) and the Office of the Vice Chancellor will provide the honorarium for each reviewer.

I. The Self-Study

As mentioned above, the DASI will share the Self-Study electronically with all members of the EPRT at least three weeks before the site visit. Physical folders with printed information should be created for the EPRT members, Vice Chancellor, Associate Vice Chancellor or Assistant Vice Chancellor, and the DASI containing: 1. itinerary, 2. recommendation report from previous program review, 3. organization chart, 4. budget sheet, and 5. key contact information.

II. On-Site or Virtual Visit Itinerary

Filling Out the Itinerary

A detailed itinerary for the EPRT’s on-site (Appendix H) or virtual visit (Appendix I) can be found in the appendices. The itinerary is not to be adjusted without consultation with the DASI. Stakeholder group meetings numbered on the itinerary are determined by the department under review. The department director and staff are responsible for determining the appropriate stakeholders to meet with the EPRT. These meetings provide opportunities for the review team to speak with staff, customers, constituents, colleagues, students, and other related parties in conducting their review. Business casual attire is recommended.

After each invited stakeholder RSVPs to the meeting invitation, all the names and roles of the attendees should be listed in the meeting holder on the itinerary (see
Executive Leadership Team breakfast as an example).

The Vice Chancellor for Student Life assigned Assistant/Associate Vice Chancellor/Associate Dean of Students for Student Life, EPRT, and the DASI, should all receive copies of the itinerary no later than the Friday before the visit.

**Stakeholder Group Meetings**

It is important to create smaller groups comprised of those who know the staff and programs best. This will allow for more dialogue and help minimize power differentials created by supervisor-supervisee relationships (which should be avoided as much as possible).

During the visit, the EPRT should meet with all the department’s key stakeholders. This may include (but is not limited to) members from the following groups:

- Department Staff (this includes exempt/non-exempt/graduate staff)
- Campus Partners (colleagues within and outside of the division)
- Executive Leadership Team
- Community Partners
- Students
- Customers
- Alumni
- Employers
- Students (undergraduate, graduate, those involved with department initiatives and those not, diverse representation, etc.)

If there are more than 7-10 confirmed attendees for stakeholder group meetings, please divide the group into three. Each EPRT member will lead the discussion separately with each group during that stakeholder meeting timeslot.

**Establishing Trust**

It is important to maintain a safe and welcoming environment so that all stakeholders feel comfortable sharing their informed perspectives. All information gathered during the review process is designed to support and enhance the department’s efficiency and effectiveness. As such, information shared during individual and group interviews is solely for the review team's use. Statements made during group interviews are not for public consumption and should be valued, respected, and treated with a spirit of confidentiality. Appendix I has a recommended statement to facilitate establishing this environment.

**Welcome Dinner**

During the Welcome Dinner (on-site visit) or Kickoff meeting (virtual visit), the AVC, EPRT, DASI, and director will discuss the visit overall. Specifically, the EPRT will have a chance to ask any questions about the self-study's content.
Executive Leadership Team Breakfast

The Executive Leadership Team breakfast is a key meeting purposefully positioned as the first stakeholder meeting with the EPRT. During this meeting, the Executive Leadership Team will share what they perceive are the strengths and opportunities for improvement for the department. They will also charge the EPRT to review the leadership of the department. Further expectations can be seen on the Executive Leadership Team Breakfast agenda in Appendix K.

EPRT Debriefing Time

The review team should be provided with ample time for meals where they are encouraged to debrief without UT staff present. These debriefing sessions are typically scheduled during meals and after stakeholder meetings unless meetings with students are determined to be best at those times. Student voices are critical to the EPRT which will be adjusted to accommodate classes.

The extended lunch on the last day of the on-site visit is a working meeting for the EPRT. The lead reviewer will check-in with the DASI at this time to confirm if a 15-minute meeting with the VC and AVC is requested prior to the oral findings meeting with the director. The EPRT will review the agenda for the two-part oral findings to ensure proper content is shared considering the two different audiences (Appendix R).

Preliminary Oral Findings

The site visit will conclude with a presentation of findings prior to the EPRT departing from campus. There are potentially three parts to the oral presentation. If it is determined that the EPRT would like to meet with the VC and supervising AVC, that will be confirmed by the DASI during the EPRT working lunch. The DASI will check in with the EPRT and invite the VC and AVC into a brief meeting 15 minutes prior to the first session.

The first session includes the EPRT, Vice Chancellor for Student Life, and assigned Assistant/Associate Vice Chancellor, department director, and DASI. After 20-30 minutes, the department staff are invited to join for a broad-themed review of the findings by the EPRT. An outline for the oral findings can be found in Appendix R.

Virtual Visit

For departments hosting a virtual on-site visit, all meetings should be offered through Zoom. Discussions between the EPRT, department director, and DASI should take place to determine the best schedule for this type of visit. Adjustments can be made as a team.
Anonymous Feedback

If stakeholders prefer to share their experiences with the department under review in an anonymous manner, a QR code to a Baseline survey will be placed in all stakeholder meeting rooms. Also, the department can attach the QR code to the meeting invitations for use by those unable to attend. These anonymous voices are only accessible by the DASI and are made available to the EPRT lead only via the DASI. The department will not have access to these anonymous entries.

III. EPRT Accommodations and Honorarium

All travel, hotels, and meals are coordinated on behalf of the EPRT by the department administrative support staff. All are direct billed to the university. Transportation to and from the airport is arranged for each member of the review team by the department, and reviewers will be reimbursed for any mileage if driving. The department will take every opportunity to provide the review team with a well-rounded Knoxville experience, including visiting off-campus dining locations, campus tours, etc., as time allows.

Student Life Finance and Administration will collect the required documents from the external review team members to ensure timely payment of the honorariums upon receipt of the final draft of the EPRT report.

Phase 4: External Review Team Celebrations and Recommendations

Within four weeks of the visit, the EPRT is expected to provide a written response for the department using a template provided by the DASI. This will include both celebrations and recommendations for improvement within the department for each standard. See appendices I and K for details. The EPRT report will be shared initially with the DASI and assigned AVC/Associate Dean, and Vice Chancellor for Student Life. Once the report is finalized, the DASI will share the EPRT findings with the director.

Note: In cases where the EPRT mentions a need to increase funding or staffing, recommendations for reallocations of funding and/or recommendations for sunsetting programs/initiatives should also be provided.

A follow-up meeting to discuss next steps between the department director and assigned AVC will be held after receiving the EPRT findings.

Phase 5: Department Response & Strategic Planning

I. Review of Recommendations

After the external review team findings have been received, the department will
discuss recommendations with the supervising AVC and VC. This discussion will determine which recommendations are accepted.

II. Department Response Report

The department will submit a response report to the DASI that will be uploaded to HelioCampus (Appendix M). It is recommended that this report be completed within one month of receiving the review team’s findings. The VC, AVC and DASI will be notified for review and approval of the report. It is important to address each recommendation whether they are accepted for implementation or not. Please provide a rationale for why a recommendation was not accepted. This report will be shared with future program review teams.

Upon completion of the department response report, the director will share it with the department staff.

III. Department Strategic Planning

The department will start developing the unit’s new strategic plan after the response report is finalized. The director will consult with the DASI and schedule meetings to facilitate strategic planning. The new strategic plan should be developed within the semester after completing the response report. The new strategic plan and program review recommendations will be entered into the Department Implementation Plan and Tracking Sheet (Appendix N) then submitted to the DASI for review. The DASI will upload the sheet into HelioCampus.

Within 6 months of the program review on-site visit, the unit will share an update with the leadership team. The unit may use the power point presentation provided by OASI. The fourth slide is optional. A preview of this presentation can be found in Appendix S.

IV. Annual Tracking and Reporting

Once the new strategic plan is approved, the department will begin collecting evidence towards their goals and objectives using metrics established upon the development of the plan. Each June, the department will submit an updated Implementation Plan and Tracking Sheet in HelioCampus. The department will adjust the strategic plan as needed.
Appendices

Many of these documents can be found in the Student Life Portal under program review.

**Appendix A:** Program Review Schedule 2018-2025

**Appendix B:** Program Review Timeline

**Appendix C:** Director of Assessment and Strategic Initiatives (DASI)

**Appendix D:** Sample Meetings Agendas and Follow-Up Emails

**Appendix E:** Self-Study Guidelines

**Appendix F:** Review Team Proposal Form

**Appendix G:** External Review Team Roles and Responsibilities

**Appendix H:** On-Site Visit Itinerary

**Appendix I:** Virtual Site Visit Itinerary

**Appendix J:** Stakeholder Meeting Recommendations

**Appendix K:** Executive Leadership Team Breakfast Agenda

**Appendix L:** External Review Team Celebrations & Recommendations

**Appendix M:** Department Response

**Appendix N:** Department Implementation Plan and Tracking Spreadsheet

**Appendix O:** Department Follow-Up Meeting

**Appendix P:** Sample Program Review Announcement Email

**Appendix Q:** Sample Program Review Calendar Invites

**Appendix R:** Preliminary Oral Findings Meeting

**Appendix S:** Program Review Update Presentation
## Division of Student Life Program Reviews 2023-2027

<table>
<thead>
<tr>
<th>Department</th>
<th>Last Review</th>
<th>Next Review</th>
<th>Considerations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student Conduct &amp; Community Standards</td>
<td>Spring 2018</td>
<td>Summer 2023</td>
<td>5 years</td>
</tr>
<tr>
<td>University Housing</td>
<td>Fall 2018</td>
<td>Spring 2024</td>
<td>5.5 years – Pushed a semester to account for new leadership</td>
</tr>
<tr>
<td>Office of Sorority &amp; Fraternity Life</td>
<td>Fall 2019</td>
<td>Fall 2024</td>
<td>5 years</td>
</tr>
<tr>
<td>Multicultural Student Life</td>
<td>Fall 2019</td>
<td>Fall 2024</td>
<td>5 years</td>
</tr>
<tr>
<td>Student Union</td>
<td>Spring 2020</td>
<td>Spring 2025</td>
<td>5 years</td>
</tr>
<tr>
<td>Center for Health Education &amp; Wellness</td>
<td>Summer 2021</td>
<td>Spring 2026</td>
<td>5 years</td>
</tr>
<tr>
<td>Center for Student Engagement</td>
<td>Fall 2021</td>
<td>Fall 2026</td>
<td>5 years</td>
</tr>
<tr>
<td>Jones Center for Leadership &amp; Service</td>
<td>Fall 2021</td>
<td>Fall 2026</td>
<td>5 years</td>
</tr>
<tr>
<td>Student Disability Services</td>
<td>Spring 2022</td>
<td>Spring 2027</td>
<td>5 years</td>
</tr>
<tr>
<td>Pride Center</td>
<td>Spring 2022</td>
<td>Spring 2027</td>
<td>5 years</td>
</tr>
<tr>
<td>RecSports</td>
<td>Fall 2022</td>
<td>Fall 2027</td>
<td>5 years</td>
</tr>
<tr>
<td>Care &amp; Resilience</td>
<td>Established spring 2022</td>
<td>Fall 2027</td>
<td>5 years *first review</td>
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<tr>
<td>Office of Student Advocacy</td>
<td>Established spring 2024 - TBD</td>
<td>TBD</td>
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*Table shows the scheduled review years for various departments within the Division of Student Life, with considerations noted for specific departments.*
### Central Services Offices

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<th>Next Review</th>
<th>Considerations</th>
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<tr>
<td>Student Life Communications</td>
<td>Established 2019</td>
<td>Spring 2024</td>
<td>7 years *first review</td>
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<tr>
<td>Student Life Technology</td>
<td>Established Spring 2017</td>
<td>Fall 2023</td>
<td>6 years *first review</td>
</tr>
<tr>
<td>Student Life Assessment &amp; Strategic Initiatives</td>
<td>Established Fall 2017</td>
<td>Fall 2025</td>
<td>8 years *first review</td>
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<tr>
<td>Student Life Finance &amp; Administration</td>
<td>Established Fall 2021</td>
<td>Spring 2026</td>
<td>4.5 years *first review</td>
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### Departments Participating in Accreditation

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<th>Department</th>
<th>Last Review</th>
<th>Next Review</th>
<th>Considerations</th>
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<tbody>
<tr>
<td>Student Health Center (Accreditation)</td>
<td>Summer 2021</td>
<td>Spring 2024</td>
<td>AAAHC Annually Updated Standards</td>
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<tr>
<td>Student Counseling Center (Accreditation)</td>
<td>2016-2017</td>
<td>Summer 2024</td>
<td>Yearly &quot;interim&quot; review with 8-year site visit cycle</td>
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### Division or Large-Scale

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<th>Considerations</th>
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<tbody>
<tr>
<td>Division of Student Life (NASPA)</td>
<td>Spring 2021</td>
<td>TBD</td>
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<tr>
<td>Dean of Students</td>
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### Number of Reviews per Semester:

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<td>Summer 2023</td>
<td>1</td>
<td>SCCS (5 years)</td>
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<tr>
<td>Fall 2023</td>
<td>1</td>
<td>SLT (6 years)</td>
</tr>
<tr>
<td>Spring 2024</td>
<td>2</td>
<td>University Housing (5.5 years), SL Communications (5.5* years)</td>
</tr>
<tr>
<td>Fall 2024</td>
<td>2</td>
<td>OSFL (5 years), MSL (5 years)</td>
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<tr>
<td>Spring 2025</td>
<td>1</td>
<td>Union (5 years)</td>
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<td>Fall 2025</td>
<td>1</td>
<td>OASI (7.5* years)</td>
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<tr>
<td>Spring 2026</td>
<td>2</td>
<td>CHEW (5 years), SL Finance &amp; Admin (4.5* years)</td>
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<td>Fall 2026</td>
<td>2</td>
<td>CSE (5 years), JCLS (5 years)</td>
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<td>Spring 2027</td>
<td>2</td>
<td>SDS (5 years), Pride Center (5 years)</td>
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<tr>
<td>Fall 2027</td>
<td>2</td>
<td>RecSports (5 years), Care &amp; Resilience (5* years)</td>
</tr>
</tbody>
</table>

*First program review for the department
Appendix B: Program Review Timeline

Program Review Timeline and To-Dos Checklist

Department:

Date of Review:

Key Contacts:

Director:

Admin Support:

External Review Team Lead:

Twelve months before:

1. **DASI.** Schedule program review kickoff meeting with director(s).
2. **Director.** Email DASI the preferred dates for program review. (Sun/Mon/Tues)  
   *Note: please let the DASI know if you request an additional day for the on-site visit.*
3. **DASI.** Confirm dates with director after verifying with Vice Chancellor, Associate/Assistant Vice Chancellor. DASI will send 3 calendar invites:  
   a. Welcome Dinner (AVC, director & DASI) - Sunday @6p-8:30p  
   b. Executive Leadership Breakfast (All of ELT) – Monday, 8a-9:30a  
   c. Preliminary Oral Findings (VC/AVC/Director/DASI) – Tuesday, 2p-3p  
   *Note: this could take place Wednesday if the on-site visit is extended one day.*
4. **DASI.** Set date for completion of the self-study in HelioCampus (Self-Study sent to EPRT three weeks prior to site visit after VC and AVC review and approve).
5. **Director.** Send general announcement email notifying leadership team and their department staff of the program review visit dates (See Appendix P).
6. **Director.** Budget travel expenses for the external program review for budget hearings *Note: The Office of the Vice Chancellor will support the taxable honorariums. If the department chooses to increase the honorariums, they will need to do so using their department budget for anything over the amount paid by the Office of the Vice Chancellor.*
7. **Admin.** Reserve locations for EPRT to have stakeholder meetings (It is recommended to keep the team in one large room having stakeholders travel to them rather than move the EPRT around campus). See itinerary for meeting types (Appendix H).
Six months before:

1. **Director.** Send list of 5-7 proposed external reviewers to DASI for approval by the VC and AVC (Appendix F).
2. **Director.** Once approved, the department director contacts the top three reviewers to gain verbal consent. Send the contacts an email to inform them that the DASI will contact them within the next week to schedule an EPRT orientation meeting (Cc DASI on the email).
3. **DASI.** Hosts orientation meeting via zoom to share the Student Life program review process with the three external program reviewers.

Five months before:

1. **Director/DASI.** Department orientation meeting with staff (Appendix D).
2. **Director/Staff.** Determine what standards will be used for Self-Study. Create department Self-Study outline for HelioCampus.
3. **Director.** Send preferred outline for HelioCampus on word document. Assign portions of Self-Study to the department staff for completion. Schedule a meeting with the staff writing team and the DASI once assignments are made to learn how to navigate HelioCampus and write narratives for the self-study.

Three months before:

1. **Director.** Submit list of stakeholder meetings for the on-site or virtual visit itinerary (Appendix H). Plan the group self-study rating exercise.
2. **DASI.** Create QR code for stakeholders to share anonymous feedback with the EPRT. (DASI will share responses with external review team lead each afternoon and the Monday following the on-site visit. Schedule follow-up Zoom meetings if requested by EPRT.)

Two months before:

1. **Director.** Finalize virtual or on-site visit itinerary. Director asks supervisor to add them to the ELT meeting agenda prior to on-site visit. (Appendix T: Presentation template).
2. **Admin.** Email calendar invites for interview sessions with stakeholders (See Appendix Q). Require RSVP to add expected guests to the itinerary (Name/role). Include the QR code for feedback on the invitations in case someone is unable to attend but would like to share their experiences with the department with the EPRT.
3. **Admin.** Reserve hotel room(s) for EPRT. Reserve a common meeting room at the hotel for the EPRT to use Sunday and Monday evenings.
4. **Admin.** Reserve plane ticket(s) for EPRT, if applicable.

5. **Student Life Finance Admin.** Have the EPRT members complete the contractual paperwork for honorarium (Office of the Vice Chancellor).

**One month before:**

1. **Admin.** Make meal arrangements for on-campus dining (dining.utk.edu/catering 4-4111). Allow EPRT to order preferences from a menu when possible, for their meals. Feel free to allow the EPRT to order from local restaurants to be delivered as well.

2. **Director.** Confirm Self-Study is ready for VC, AVC, & DASI review in HelioCampus (at least five weeks prior to the site visit). Send the latest draft of the itinerary to the DASI.

3. **DASI.** Either approve or provide suggested edits by the VC, AVC, & DASI within one week.

**Three weeks before:**

1. **Director.** Confirm updates of any requested edits for Self-Study in HelioCampus and notify DASI for final review. Send the latest draft of the itinerary to the DASI.

2. **DASI.** Send materials to EPRT (Self-Study via zip folder, itinerary, key UT contact information for the on-site visit).

3. **Admin.** Prepare EPRT swag bags (place in hotels rooms) and folders for EPRT, VC, AVC, and DASI (itinerary, organization chart, budget sheet, key UT contact information for the on-site visit, and previous review recommendations). Note: include EPRT team bios for VC/AVC/DASI.

**Final steps for on-site visit preparations:**

1. **Admin.** Confirm meeting spaces - be intentional about room configuration in advance.

2. **Admin.** Call one day prior to confirm refreshments.

3. **Admin.** Supply water, snacks, pens/pencils and notepads in meeting spaces.

4. **Admin/Director.** Prior to printing folders - Add flight information and confirm airport pick-up staff to the itinerary. Confirm Sunday Welcome Dinner arrangements for on-site visits. Update RSVPs to the itinerary for stakeholder meetings.

**Follow-up:**

1. **DASI.** Thank you emails within a week reminding EPRT of their deadline.

2. **Student Life Finance Admin.** Pay taxable honoriums after receipt of EPRT final copy of the recommendations report (One month after on-site visit).
3. **Director.** Schedule a meeting with VC and AVC to discuss the department’s Response to the EPRT recommendations and action plan.

4. **Director.** Enter department Response Report in HelioCampus ([Appendix M](#)).

5. **Director.** After the Response Report is entered into HelioCampus, the director will share the EPRT findings and action plan with staff and/or stakeholders. (See [Appendix O](#)).

6. **Director.** Schedule a meeting with DASI to begin the development of the department’s new strategic plan using the Implementation Plan and Tracking Sheet within one week of entering the department Response in HelioCampus ([Appendix N](#)). Schedule check-in meetings with the DASI for strategic planning.

7. **Director.** Provide an “update” presentation to the leadership team six months after the on-site visit. (See [Appendix S](#)).
Appendix C: Director of Assessment and Strategic Initiatives (DASI)

- The primary responsibilities of the DASI include:
  - Collaborate with the unit head to create an environment conducive to the program review process
  - Ensure that the program review process meets the guidelines and expectations set forth in the program review guidelines
  - Assist department processes to develop the pre-visit materials (Self-Study, itinerary, folders, etc.)
  - Facilitate the EPRT’s site visit:
    - Initiate the review process and maintain alignment with the timeline.
    - Distribute materials (itinerary, Self-Study, etc.) to review team and other campus administrators.
    - Guide the administrative assistant to facilitate all travel, meals and other logistics.
    - Guide the scheduling of interview times for constituents to meet with members of the review team.
  - Guide the Student Life Finance and Administration team in the procurement of NetIDs and payment of honorariums.
  - Oversee all communication with the review team before and after their site visit (including thank you notes, survey links, etc.)
  - Ensure the department Response is entered into HelioCampus within one semester of the receipt of the EPRT’s findings.
  - Guide the department in strategic planning after the program review has concluded using the Department Program Review Implementation Plan and Tracking Sheet.
Appendix D: Sample Meeting Agendas and Follow-Up Emails

AGENDA: Program Review Kickoff Meeting for Directors

I. Introduction to Program Review
   a. Director led
   b. To guide strategic planning
   c. Safeguards put into place to ensure trust and reliability (follow Guidelines)

II. Overview of Roles & Responsibilities
   a. DASI
      i. Builds HelioCampus space
      ii. Communications with EPRT
      iii. Facilitates approval (EPRT members, Itinerary, Self-Study)
      iv. Keeps all parties on track with timeline
   b. Department
      i. Identifies preferred standards
      ii. EPRT accommodations
      iii. Self-study development
      iv. Itinerary

III. Next Steps
   a. Select/confirm dates
   b. Identify standards
   c. Recommend reviewers
   d. Select team members to access HelioCampus

IV. Q&A

FOLLOW-UP EMAIL: Program Review Kickoff Meeting

Thanks to all for joining today’s Program Review kickoff. OASI is excited to help make this process easy and successful for your departments.

Below are the action items from today’s meeting. At your convenience:

- Send two sets of dates (Sun-Tues) for consideration, as well as any times that are absolutely in conflict for your department.
- Decide which standards (CAS or other professional standards) will be used to create your Self-Study.
- Send Appendix F at least 6 months prior to the site visit to the DASI for approval of preferred external review team members.
- Send names/Net IDs of team members who need access to HelioCampus
access to assist in the building of the Self-Study.

Happy to help talk through any or all of these pieces (click here to schedule a meeting).

Thanks again to all!

**AGENDA: Department Orientation Meeting**

I. Introduction to the Program Review Process
   a. Overview of program review guidelines/phases
   b. Review the purpose of the program review process
   c. Dates of the on-site visit

II. Director of Assessment and Strategic Initiatives
   a. DASI role

III. External Review Team
   a. Role of the Review Team
   b. Review Team suggestions/requests

IV. Writing the Self-Study
   a. Writing Team
   b. HelioCampus

V. On-Site Visit
   a. Itinerary
   b. Department responsibilities

VI. Next Steps
   a. Timeline

VII. Questions

**AGENDA: External Program Review Team Welcome Dinner**

I. Welcome by DASI

II. Introductions
   a. Lead reviewer and team
   b. AVC and director

III. EPRT Questions
   a. Self-study questions
   b. On-site visit questions

IV. AVC and Director
   a. Reinforce priorities for the EPRT
   b. Share concerns and unique political lenses applicable to UT if needed for context
AGENDA: Self-Study Writing Team Training

I. Welcome
II. Timeline
III. Self-Assessment Guide (SAG)
   a. Assigned narratives
   b. Writing
      i. Narrative
         1. CAS canned documents
      ii. Rationale
   c. Rating process
      i. Individual
      ii. Group
IV. HelioCampus
   a. Navigating the software
   b. Entering content and linking documents
V. OASI Share Point Site
   a. General Resources

Appendix E: Self-Study Guidelines

Each department will prepare an in-depth Self-Study prior to the site visit by the review team. The Self-Study will be entered into HelioCampus:

Department Executive Summary

Department Introduction
Department history
Organizational framework (org charts)
Constituents served
Departmental strategic plan

Integration of University and Divisional plans
Alignment with strategic plans - Include evidence and rationale on how the Self-Study integrates the division and university strategic plans.
Upload pdfs of each plan

Summary of Relevant Data
Previous Program Review Findings/Tracking
Department Key Performance Indicators
Miscellaneous - include data related to learning outcomes, program outcomes, usage, access, certifications, memberships, retention, etc.

**CAS or other professional organizational standards** - Each standard is explained in detail within the department’s Self-Study found in HelioCampus. Each external review team member will receive access to this material to inform their practice. Departments will use the SAG to provide information about each of the Self-Study standards. If other professional organizational standards are used, it is up to the department to decide which standards to apply in the Self-Study.
Appendix F: Review Team Proposal Form

The department director will compile a list of at least five potential external reviewers, including reviewer names, current position/employer, and rationale for their inclusion.

<table>
<thead>
<tr>
<th>Proposed Reviewer (Include current e-mail address and phone number)</th>
<th>Current Role/Institution (may also include involvement in professional associations)</th>
<th>Evidence of Expertise</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Preferred Lead:</strong></td>
<td></td>
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</tbody>
</table>
Appendix G: External Review Team Roles and Responsibilities

External Review Team Expectations

The department undergoing program review will rely heavily on the expertise of the external program review team (EPRT) leader and team members to evaluate, analyze, provide constructive feedback, and recommend strategies to improve the quality of the department’s programs and services. EPRT recommendations will be considered during short term and long-term planning. The EPRT lead is expected to cultivate a cohesive team that will fully engage in the review process and will enter responses into HelioCampus. Questions throughout this process may be directed to the University of Tennessee Division of Student Life Director of Assessment & Strategic Initiatives (DASI).

I. Prior to the Site Visit
   a. The EPRT lead is expected to make initial contact with the team to prompt (electronic) introductions and to share any initial thoughts or expectations about the process.
   b. All team members are expected to read the Self-Study which is shared electronically HelioCampus at least two weeks before the site visit. All team members are also expected to review the EPRT’s site visit itinerary, sent (electronically) two weeks prior to the site visit. The itinerary will include opportunities for EPRT to speak with staff, customers, constituents, colleagues, students, and other related parties.
   c. Once the Self-Study and itinerary have been shared, the EPRT leader should follow up with the team about initial questions and approaches to the visit and guide the EPRT in brainstorming initial questions for each interview before the review starts Appendix J has been provided to assist the development of these questions. The EPRT may also recommend additional interviews.

II. During Site Visit
   EPRT members will participate in the following activities:
   a. Welcome and orientation dinner
   b. Executive Leadership Team Breakfast to hear about priorities and areas of interest on behalf of executive leadership (Appendix K).
   c. Meetings with key stakeholders for the department, to last a minimum of one hour each. Stakeholders may include (but are not limited to) the following: department staff, campus partners, upper administration, community partners, students, customers, alumni, and employers. If applicable, individual appointments via phone or videoconferencing may occur for stakeholders unable to attend meetings. Appendix J contains material to guide the EPRT through the various meetings scheduled during the on-site visit.
   d. Intentional time spent with the department director
   e. Processing time for the team to identify and discuss major findings and approaches to the response in HelioCampus.
f. Preliminary Findings meeting (Appendix R) with the Vice Chancellor for Student Life, the assigned Associate/Assistant Vice Chancellor/Associate Dean of Students for Student Life, and the DASI. The department director and staff will be invited for an additional sharing of findings from a broader more strategic perspective.

The EPRT will be provided with space on campus to conduct meetings and will have time to meet as a team. If the EPRT should need anything during the visit, the DASI will be available and ready to assist.

At the beginning of each stakeholder meeting, the EPRT leader should introduce the group and state the purpose of the meeting. A safe and welcoming environment will be fostered so that stakeholders feel comfortable discussing important issues openly. An example statement can be found in Appendix J. Team members should take notes during the meetings to capture responses and ideas to contribute to their findings. The EPRT will introduce the QR codes provided for participants to electronically record their answers to questions anonymously. In either case, the leader is responsible for ensuring that participants know that all information shared is for the EPRT only, and that statements made will be valued, respected, and kept confidential.

III. Following the Site Visit
Within four weeks of the site visit:
   a. The EPRT lead will enter content into HelioCampus and notify the DASI via email. The DASI will then share the findings with the Vice Chancellor and Associate/Assistant Vice Chancellor for review. Any requests for edits or clarification will be communicated by the DASI to the lead reviewer. Once the content has been finalized, the DASI will alert the department director within HelioCampus for review.
   b. The EPRT lead is ultimately responsible for finalizing content in HelioCampus. The EPRT lead must give all team members ample opportunity to review and contribute to the content in HelioCampus.
Appendix H: On-Site Visit Itinerary

Department Name

Program Review Site Visit Itinerary

Dates of Visit

External Program Review Team:

Name, title, university
Name, title, university
Name, title, university

Sunday Evening

Airport details: flight #/time/gate - person driving/cell number

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<td>6:00 pm</td>
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<td>Welcome Dinner</td>
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External Program Review Team (EPRT)

[NAME], Associate/Assistant Vice Chancellor
[NAME], Director of [DEPARTMENT]

Dr. Melissa Brown, Director of Assessment and Strategic Initiatives (DASI)
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<th>Staff Host</th>
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<td>8:00 am</td>
<td>Depart Hotel</td>
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| 8:00 am    | 9:30 am | **Catered Breakfast**  
**Executive Leadership**  
Dr. Frank Cuevas, Vice Chancellor  
Dr. Chandra Myrick, Associate Vice Chancellor  
Mark Alexander, Assistant Vice Chancellor  
Dr. Byron Hughes, Assistant Vice Chancellor  
Dr. Susannah Marshman, Assistant Vice Chancellor  
Dr. Jill Zambito, Assistant Vice Chancellor |          |            |

Accessing campus WIFI:  

If you are not successful accessing the campus WIFI after these steps, call OIT Helpdesk directly at 865-974-9900.

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<td><strong>Department Director/Guided Tour of Facilities</strong></td>
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<td>11:00 am</td>
<td>12:00 pm</td>
<td>Department Staff</td>
<td></td>
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</table>
| 12:00 pm   | 1:30 pm | **Catered Lunch**  
EPRT Only |          |            |
| 1:30 pm    | 2:30 pm | **Student Life Leadership Team**  
(Divide EPRT)  
**Group A:** CHEW, SCC, SHC, CCR, RecSports, Union, Housing  
[ NAMES/ ROLES],  
**Group B:** SDS, SCCS, Pride, MSL, |          |            |
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<th>End Time</th>
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<th>Location</th>
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<td><strong>Preliminary Findings: Leadership</strong></td>
<td>Dr. Frank Cuevas, Vice Chancellor [NAME], Assistant Vice Chancellor [NAME], Director of [Department] Dr. Melissa Brown, DASI</td>
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<td><strong>Wrap Up</strong></td>
<td>DASI and EPRT</td>
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<td><strong>EPRT Departure</strong></td>
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*Airport details: flight #/time/gate - person driving/cell number*
Appendix I: Virtual Site Visit Itinerary

Department Name

Program Review Virtual Visit Itinerary

Dates of Visit

External Program Review Team:

Name, title, university
Name, title, university
Name, title, university

Friday

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<td>[NAME], Associate/Assistant Vice Chancellor</td>
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<td>[NAME], Director of [DEPARTMENT]</td>
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<td></td>
<td>Dr. Melissa Brown, Director of Assessment and Strategic Initiatives (DASI)</td>
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Monday

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<td>Dr. Cuevas, Vice Chancellor</td>
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<td></td>
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<td>NAME, Associate Vice Chancellor</td>
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<td>*Virtual guided tour of facilities if desired</td>
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<td>10:40 am</td>
<td>11:00 am</td>
<td>Break</td>
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<td>12:00 pm</td>
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<tr>
<td>12:00 pm</td>
<td>1:30 pm</td>
<td>Lunch Break</td>
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<td>1:30 pm</td>
<td>2:30 pm</td>
<td>Student Life Leadership Team (Divide EPRT into breakout rooms)</td>
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<tr>
<td></td>
<td>2:30 pm</td>
<td>Group A: CHEW, SCC, SHC, CCR, RecSports, Union, Housing [NAMES/ROLES], Group B: SDS, SCCS, Pride, MSL, CSE, OSFL, JCLS, CBN, CSA [NAMES/ROLES], Group C: OASI, SLC, SLT, SLF&amp;A [NAMES/ROLES]</td>
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<td></td>
<td>3:40 pm</td>
<td>*Stakeholder group sessions are up to the department to determine those invited. All other itinerary meetings are not to be changed without consulting the DASI.</td>
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<td>3:40 pm</td>
<td>3:50 pm</td>
<td>Break</td>
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<td>3:50 pm</td>
<td>4:50 pm</td>
<td>Stakeholder Group 2</td>
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<td>4:50 pm</td>
<td>5:00 pm</td>
<td>Break</td>
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<tr>
<td>5:00 pm</td>
<td>6:00 pm</td>
<td>Student Stakeholder Group</td>
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**Tuesday**

<table>
<thead>
<tr>
<th>Start Time</th>
<th>End Time</th>
<th>Event</th>
<th>Location</th>
<th>Staff Host</th>
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</thead>
<tbody>
<tr>
<td>8:00 am</td>
<td>9:00 am</td>
<td>Review Team Meeting</td>
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<tr>
<td>Time</td>
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<td>9:00 am</td>
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<td><strong>Stakeholder Group 3</strong></td>
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<td>Break</td>
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<td>10:10 am</td>
<td>11:10 am</td>
<td><strong>Stakeholder Group 4</strong></td>
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<td>Break</td>
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<td>11:20 am</td>
<td>12:20 pm</td>
<td><strong>Stakeholder Group 5</strong></td>
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<td>12:20 pm</td>
<td>2:00 pm</td>
<td><strong>Virtual Lunch &amp; Process Time</strong></td>
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<td>EPRT Only</td>
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<td>2:00 pm</td>
<td>2:30 pm</td>
<td><strong>Preliminary Findings:</strong></td>
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<td>Dr. Cuevas, Vice Chancellor</td>
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<td>Dr. [NAME], Associate/Assistant Vice Chancellor</td>
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<td>[NAME], Director of [Department]</td>
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<td>Dr. Melissa Brown, DASI</td>
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<tr>
<td>2:30 pm</td>
<td>3:00 pm</td>
<td><strong>Preliminary Findings:</strong></td>
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<td><strong>Staff</strong></td>
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<td>*Leadership also attends</td>
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<td>3:00 pm</td>
<td>3:30 pm</td>
<td><strong>Wrap Up</strong></td>
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<td>DASI and EPRT</td>
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<td>Melissa Brown</td>
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<td>Melissa Brown</td>
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Appendix J: Stakeholder Meeting Recommendations

Stakeholder Meeting Recommendations

This document has been created to assist the External Program Review Team (EPRT) in facilitating conversations with various stakeholders that engage with the department under review. Please feel free to modify the questions as needed to elicit the content needed to inform your observations. The questions provided are simply recommendations. Please begin each interview by reading the welcome script provided below.

Welcome Script/Beginning Statement:

Hello, welcome, and thank you for taking the time to join us. We are excited you have chosen to participate in the program review for [DEPARTMENT]. [EPRT MEMBER NAMES] were invited to participate in this ongoing evaluation process and will serve in the role of conveners, listeners, and learners.

Our purpose in this process is to observe/study the culture, climate, and practices present at UTK related to [DEPARTMENT]. We will take notes on the experiences shared. Please know that names will not be associated with any statement or message. As a team, we will review all notes and highlight common themes that emerge.

It is important for us to commit to honoring anonymity in this process. The details of who shares something in this space stay here. We do plan to include what is learned from the collective conversation all of us engage in. We honor confidentiality and look forward to hearing your observations, ideas, and thoughts related to [DEPARTMENT].

There are multiple ways to engage with us in this exercise. The most immediate is for each of you to share during this conversation. As time is limited, please know that there is a QR code available for anonymous sharing of information. The material collected through the QR code will only be reviewed by the EPRT. We request that you refrain from sharing important information with us in between meetings to ensure we remain on schedule and prevent the loss of any information. If you prefer to share something privately, you may use the QR code provided.

In order to maximize this time, we invite all to practice the lean in/lean out method and allow time for everyone to participate. Any questions?
Potential questions for standard stakeholder groups

Senior Administrators:
- What is your perception of the current/future role of [DEPARTMENT]?
- Who are [DEPARTMENT] constituents?
- How supported do you think the department feels? Morale? Financially? Understanding of their mission? Purpose?
- What would you consider to be the successful outcome of this review? What do you expect from the reviewers?
- How do you envision [DEPARTMENT] fulfilling their responsibilities?
- How often are you present at the [DEPARTMENT] events? Or those of their clubs?
- What are the strengths/opportunities of the department’s leadership?
- Are there any concerns about the staff within [DEPARTMENT]?

Campus Stakeholders and/or Student Life Leadership:
- What has been your interaction with [DEPARTMENT]? (Individual responses)
  - If programming- What role did you play? (Assisted with the development, Financial only, aiding in marketing, etc.)
- What are the successful outcomes of this review?
- Are there areas of opportunity between [DEPARTMENT] and you that have not been missed?
- If the department/program were to add or remove activities, programs, or services – what would you suggest?
- What do you want us to know about this department/program?

Department Staff
- What is your perception of Student Life’s executive leadership team support? Fulfilling your mission/vision? Financial? Presence? Other resources?
  - Do you believe it is genuine? Or to appease the campus?
  - Is the executive leadership team proactive or reactive to [DEPARTMENT] issues/efforts?
- What resources are needed to move [DEPARTMENT] to the next level of excellence?
- What would you consider to be the successful outcome of this review? What do you expect from the reviewers?
- Professional Development opportunities? Upward mobility opportunities?
- What are you most proud of related to [DEPARTMENT]?
- What are the opportunities for improvement for [DEPARTMENT]?

Student Stakeholders
- What is your name, major, and affiliation with [DEPARTMENT]?
• What is your impression or perception of [DEPARTMENT] and the services and programs offered?
• Do you feel that your organizations/clubs are receiving adequate support to fulfill your mission? If not, what additional support would you like to see financially, facilities access, human capital, etc.?
• What have been your experiences with [DEPARTMENT] as a student leader?
Executive Leadership Team Breakfast Agenda

Charge to External Program Review Team

I. Introductions lead by Vice Chancellor for Student Life or supervising AVC
II. Department highlights from perspective of Executive Leadership Team
III. Expectations of the EPRT by executive leadership
IV. Questions from the EPRT
Appendix L: External Review Team Celebrations & Recommendations

The EPRT will address each standard in a template that will be provided by the DASI. The response will include both celebrations of the work that the department is doing well and recommendations for improvement within each standard. The EPRT is to include observations about the leadership and climate of the department as well. In cases where the EPRT recommends increased funding or staffing, recommendations for reallocations of funding and/or retirement of programs/initiatives should also be provided. The DASI will upload the final version of this report in HelioCampus.
Appendix M: Department Response

The department Response concludes the self-assessment process by detailing actions to be taken as a result of the EPRT’s recommendations. This response is to be entered in the response report template found in the Student Life portal in the Office of Student Life Assessment and Strategic Initiatives department under program review. Once completed, the director will submit the report to OASI for approval. The DASI will upload the final report into HelioCampus. The director will then begin strategic planning activities.
Appendix N: Department Implementation Plan and Tracking Spreadsheet

This spreadsheet should be used to outline the department strategic plan for the next 3-5 years until the next program review. The template for this can be found in the Student Life portal in the Office of Student Life Assessment and Strategic Initiatives under program review. Each annual reporting cycle, the director will submit an updated copy to the DASI for upload into HelioCampus.
Appendix O: Department Follow-Up Meeting

Post-Review Department Follow-Up Meeting

I. Review the process
   a. Three members of the external program review team (EPRT)
   b. Self-Study
   c. On-Site Visit
   d. EPRT Recommendations
   e. Department Response and tracking sheet

II. Findings
   a. Celebrations
   b. Recommendations

III. Next Steps
   a. Review action steps to complete the Implementation Plan and Tracking Sheet
   b. Strategic Planning (Next 5 years)

IV. Conclusion
   a. Thank you for participation in the process
   b. Comments, questions, concerns
Appendix P: Sample Program Review Announcement Email

Good morning!

(Department Name) is excited to announce that we have invited three external reviewers to campus for our Program Review on (Date). We value our partnership with your office/department and request that you place a hold on your calendar to attend the session for the (Interview Team Session Name) to provide feedback and assistance to the review team. An official calendar invitation will be forthcoming, and your input and feedback are critical to our review.

The Program Review Team includes:

- Name, Title, Institution
- Name, Title, Institution
- Name, Title, Institution

Please let me know if you have any questions or conflicts.

Thank you for your participation in this important review.
Appendix Q: Sample Program Review Calendar Invites

Hello!

(Name of Department) will be conducting an external program review and would like to invite you to participate. The following meeting time has been set-up for you to meet with the reviewers:

- (Date) Monday, September 25, 2018
- (Time) 3:30-4:30 p.m.
- (Location) Brown Hall Multi-Purpose Rooms

We are extremely interested in your feedback for (Department Name) and would appreciate your participation at this meeting. Please respond to this email by (Date) to let us know if you can attend.

If you are unable to join us during the site visit, please scan the QR code below to share celebrations and opportunities for improvement with the external review team members. The director for student Life Assessment and Strategic Initiatives will share these submissions with the lead of the external review team only. The department will not receive these anonymous entries.

[PASTE QR CODE HERE]

Thank you for your help!
Appendix R: Preliminary Oral Findings Meeting

Preliminary Oral Findings Meeting Agenda

I. Leadership Concerns (VC, AVC, and DASI) 15 minutes before 1st part if requested
   a. DASI to check-in with EPRT during working lunch
   b. Will call for VC and AVC early if needed

II. 1st part with (VC/AVC/Director/DASI) 30 Minutes
   a. Preliminary themes related to celebrations and recommendations/opportunities for improvement
   b. Findings related to staffing/staffing structure and/or resources (if applicable)
   c. Confirm what will be shared by EPRT with staff in part 2

III. 2nd part with (1st part attendees plus department staff) 30 Minutes
   a. Preliminary themes related to celebrations and recommendations/opportunities for improvement, not to include staffing/staffing structure or resources
Appendix S: Program Review Update Presentation

Program Review Update
Department Name
Date of Review

Themes Identified by the EPRT
Enter text here identifying the themes as presented by the EPRT.
Actions Taken by Unit

Enter text here describing actions taken as a result of the response report and the strategic planning timeline for development or presentation of the developed plan.

Steps Taken to Share With Stakeholders

Enter text here describing how findings informed action by the unit have been shared with stakeholders that invested in the process and other stakeholders as well.

This slide is optional.
Appendix T: ELT Presentation Template

This is an example of an Executive Leadership Team presentation by the director of Student Life Communications.

Student Life Communications

2024 Program Review

Strengths

- Strong core set of communications resources offered
  - Digital communications (web, intranet, chatbot, email marketing)
  - Creative communications (graphic design, environmental art, merchandise)
  - Strategic communications (content strategy, social media, media strategy)
- Continuous use of data to inform best practice
- Strong sense of collaboration, feedback, and support within the office
Weaknesses

- Limited access to executive leaders and decision-making spaces, resulting in lack of alignment in communications strategy across the division
- Limited pool of qualified students to support video and graphic design work
- Inconsistency with project management across functional areas

Opportunities

- Recent staffing additions to the digital communications team offers bandwidth to enhance the division’s online presence
- Strengthen assessment plans for program areas under new model from OASI
- Maximize use of freelance contracts and vendors to expand bandwidth
Threats

- Recurring requests from division leadership to hire communications staff members for departments instead of resourcing centralized office
- Resource constraints (graphic design, marketing, centralized project management)
- Facility constraints (team is split and separated; not enough offices for staff and future growth)

Program Review Team

Sara Turner
Emory University

Amy Nichols
University of Alabama

Dan Kohler
University of Nebraska