Program Review Guidelines

Updated October 2023
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**Introduction**

The departmental program review is a collaborative process that enhances the mission of the Division of Student Life by providing opportunities for departments to assess, share, and improve their impact, services, and quality of work. Each program review is an opportunity for the department to take a comprehensive and critical look at the unit, to clearly state and evaluate strengths and weaknesses, and to determine future action needed. This process empowers departments within the Division of Student Life to think critically about their work and its impact on the student experience at the University of Tennessee (UT) to continually improve our campus and community.

The External Program Review Team (EPRT) is composed of national and/or regional experts who specialize in the field of the department under review. The EPRT evaluates, analyzes, provides constructive feedback, and recommends strategies to improve the quality of the department’s programs and services, and their insight also allows for comparisons to peer and aspirant institutions.

The EPRT uses the department’s Self-Study as the basis for the on-site visit. The resulting EPRT findings are not simply a reaffirmation or rework of the Self-Study but should offer a new perspective, fresh insight, and new ideas to the department’s self-discovery. EPRT recommendations will be considered during short-term and long-term planning.

The EPRT’s primary responsibilities are to:

- Review the department Self-Study and other materials provided.
- Respond to the department Self-Study and on-campus interview observations providing recommendations for the department’s consideration.
- Bring fresh insight to the review processes.

All components of the Program review will be submitted, housed, and reviewed 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

The Division of Student Life develops student-centered opportunities that contribute to a transformative Volunteer Experience. These experiences create a climate in which learning, belonging, engagement, inclusivity, and care can thrive.

Program Review Process

The departmental program review is a collaborative process that enhances the missions of both the University and the Division of Student Life by providing opportunities for departments to assess, share, and improve their impact, services, and quality of work. Each program review is an opportunity every five years for the department to take a comprehensive and critical look at the unit, to clearly state and then evaluate strengths and weaknesses, and to determine future action needed. This process empowers departments within the Division of Student Life to continuously improve by thinking critically about how their work impacts the campus and community at The University of Tennessee.

Program Review Goals

- Provide evidence to assist departments in reallocation of department resources
- Align with the Academic Program Review process at The University of Tennessee, Knoxville
- 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
• Shape and launch department strategic planning for both short- and long-term planning processes

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 the 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 and work
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:

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

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

C. Reviewers should be available for selected dates of review and able to return the 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 but not limited to travel, agenda, hotels, meals, campus tours, and all future communication about logistics leading up to their arrival. It will also need to be determined if the reviewers will conduct the visit remotely or face-to-face.

**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 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.

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 who have not been employed by the department under review. It is recommended that reviewers be familiar with the work of the division 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 that are numbered on the itinerary are to be 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.

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 less than two weeks 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 for a minimum of one hour. 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 large 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 efficiency and effectiveness of the department. As such, information shared during individual and group interviews is solely for the use of the review team. Statements made during group interviews are not for public consumption and should be valued, respected, and treated with a spirit of confidentiality. _Appendix J_ 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 an opportunity to ask any questions they may have regarding the content of the self-study.

_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 in the Executive Leadership Team Breakfast agenda in _Appendix K_.

_EPRT Debriefing Time_

The review team should be provided 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 there are department leadership concerns, those will be identified during the 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. Additionally, the department can attach the QR code to the meeting invitations for use by those that are 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 members. 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.

The Office of the Vice Chancellor will collect the required documents (Vendor Business Classification Form, Vendor Payment Selection Form, Vendor W9 Form, Worker Classification Questionnaire) from the external review team members to ensure access to Heliocampus and timely payment of the honorariums upon completion of the EPRT recommendations in Heliocampus.
**Phase 4: External Review Team Celebrations and Recommendations**

Within four weeks of the visit, the EPRT is expected to provide a written assessment of the department in Heliocampus. This will include both celebrations and recommendations for improvement within the department for each standard. See appendices I and K for details. These recommendations will be shared initially with the DASI and assigned AVC/Associate Dean, and Vice Chancellor for Student Life. Once the recommendations are approved, the DASI will share the EPRT findings with the department director.

*Note:* 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.

A follow-up meeting to discuss next steps with the department director and assigned AVC will be held the week following the receiving of the EPRT findings. The director of the department will share the recommendations with their staff.

**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. Response in Heliocampus**

The department will enter a Response in Heliocampus (Appendix M). The Response will be entered in each standard narrative in the section after the EPRT recommendations. Please complete this step within one month of receiving the review team’s findings. The VC, AVC and DASI will be notified for review and approval of the department Response. It is important to address each recommendation whether they are accepted for implementation. Please provide a rationale as these recommendations will be shared with future program review teams.

Upon completion of the department Response, the director will share the Response with the department staff.

**III. Strategic Planning**

Once the plan has been approved, the department will commence with the development of the unit’s new strategic plan. The director will consult with the DASI and schedule meetings with the department staff to facilitate strategic
planning. The new strategic plan should be developed within the semester after completing the Response in Heliocampus. 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.

Within 6 months of the program review on-site visit, the unit will share an update when presenting at the Student Life Impact Event. The unit will 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. Departments will use the assessment pathways to continuously review data and improve programming and services. Each June, the department will submit an updated Implementation Plan and Tracking Sheet to OASI. The department will edit the strategic plan as needed.
Appendices

The following appendices accompany these Program Review Guidelines and can be found on the Office of Student Life Assessment and Strategic Initiatives’ SharePoint site.

**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
Appendix A: Program Review Schedule 2023-2027

## 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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### Central Services Offices

<table>
<thead>
<tr>
<th>Department</th>
<th>Last Review</th>
<th>Next Review</th>
<th>Considerations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student Life Communications</td>
<td>Established 2019</td>
<td>Spring 2024</td>
<td>7 years *first review</td>
</tr>
<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>
</tr>
<tr>
<td>Student Life Finance &amp; Administration</td>
<td>Established Fall 2021</td>
<td>Spring 2026</td>
<td>4.5 years *first review</td>
</tr>
</tbody>
</table>

### Departments Participating in Accreditation

<table>
<thead>
<tr>
<th>Department</th>
<th>Last Review</th>
<th>Next Review</th>
<th>Considerations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student Health Center (Accreditation)</td>
<td>Summer 2021</td>
<td>Spring 2024</td>
<td>AAAHC Annually Updated Standards</td>
</tr>
<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>
</tr>
</tbody>
</table>

### Division or Large-Scale

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

- **Summer 2023**: 1
  - SCCS (5)

- **Fall 2023**: 0
  - SLT (6)

- **Spring 2024**: 2
  - University Housing (5.5), SL Communications (5.5*)

- **Summer 2024**: 1
  - Student Counseling Center (First division lead review)

- **Fall 2024**: 2
  - OSFL (5), MSL (5)

- **Spring 2025**: 2
  - Union (5), OASI (7.5*)

- **Fall 2025**: 1
  - OASI (7.5*)

- **Spring 2026**: 2
  - CHEW (5), SL Finance & Admin (4.5*)

- **Fall 2026**: 2
  - CSE (5), JCLS (5)

- **Spring 2027**: 2
  - SDS (5), Pride Center (5)

- **Fall 2027**: 2
  - RecSports (5), Care & Resilience (5*)
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:

<table>
<thead>
<tr>
<th>Timeline and To-Dos</th>
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<tbody>
<tr>
<td><strong>Twelve months before:</strong></td>
</tr>
<tr>
<td>1. <strong>DASI.</strong> Schedule program review kickoff meeting with director(s).</td>
</tr>
<tr>
<td>2. <strong>Director.</strong> Email DASI the preferred dates for program review.</td>
</tr>
<tr>
<td>(Sun/Mon/Tues) <strong>Note:</strong> please let the DASI know if you request an additional day for the on-site visit.</td>
</tr>
<tr>
<td>3. <strong>DASI.</strong> Confirm dates with director after verifying with Vice Chancellor, Associate/Assistant Vice Chancellor. DASI will send 3 calendar invites:</td>
</tr>
<tr>
<td>a. Kickoff Meeting (AVC &amp; Director) - Sunday @6p-8:30p</td>
</tr>
<tr>
<td>b. Executive Leadership Breakfast (All of ELT) – Monday, 8a-9:30a</td>
</tr>
<tr>
<td>c. Preliminary Oral Findings (VC/AVC/Director) – Tuesday, 2p-3p <strong>Note:</strong> this could take place Wednesday if the on-site visit is extended one day.</td>
</tr>
<tr>
<td>4. <strong>DASI.</strong> Set date for completion of the Self-Study in Heliocampus (Self-Study sent to EPRT three weeks prior to site visit).</td>
</tr>
<tr>
<td>5. <strong>Director.</strong> Send general announcement email notifying leadership team and department staff of program review visit dates (See Appendix P).</td>
</tr>
<tr>
<td>6. <strong>Director.</strong> Budget travel expenses for the external program review for budget hearings <strong>Note:</strong> 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.</td>
</tr>
</tbody>
</table>

| **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 and inform them that the DASI will contact them within the next week to schedule an EPRT orientation meeting. | |
| 3. **DASI.** Secure agreements from the top three external program reviewers | |
through Zoom conference.

**Five months before:**

1. **Director/DASI.** Department orientation meeting with staff ([Appendix D](#)). Create department Self-Study outline in Heliocampus. Schedule a meeting with the staff writing team once assignments are made for completing the self-study.
2. **Director/Staff.** Determine what standards will be used for Self-Study.
3. **Director.** Send preferred outline for Heliocampus on word document. Assign portions of Self-Study to the various parties for completion.

**Three months before:**

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

**Two months before:**

1. **Director / DASI.** Finalize virtual or on-site visit itinerary. Send QR feedback code to department. Add director to ELT meeting agenda for meeting prior to on-site visit.
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 to the invitations in case someone is unable to attend but would like to share anything with the EPRT.
3. **Admin.** Reserve locations for EPRT to meet.
4. **Admin.** Reserve hotel room(s) for EPRT.
5. **Admin.** Reserve plane ticket(s) for EPRT, if applicable.
6. **Student Life Finance Admin.** Have the EPRT members complete the contractual paperwork for honorarium (Office of the Vice Chancellor).
7. **Student Life Finance Admin.** Request NetIDs for EPRT from OIT to access Heliocampus at least three weeks prior to the site visit (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 lunches.
2. **Director.** Confirm Self-Study is ready for VC, AVC, & DASI review in Heliocampus (at least four weeks prior to the site visit).
3. **DASI.** Either approve or provide suggested edits by the VC, AVC, & DASI within one week. Email the final site visit itinerary to department director, EPRT, VC, and AVC (Upload to Heliocampus).

**Three weeks before:**

1. **Director.** Confirm updates of any requested edits for Self-Study in Heliocampus and notify DASI for final review.
2. **DASI.** Send materials to EPRT (link to Self-Study in Heliocampus, itinerary, key UT contact information for the on-site visit, campus map, and Knoxville Visitor Sheet).

3. **Admin.** Prepare EPRT swag bags (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:**

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

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

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

6. **Admin/Director.** Prior to printing folders - Add flight information and confirm airport pick-up staff to the itinerary. Confirm Sunday 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 honorariums after receipt of EPRT recommendations (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 in Heliocampus (**Appendix M**)

5. **Director.** After the Response to recommendations 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.** Update presentation given 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:

1. Collaborate with the unit head to create an environment conducive to the program review process
2. Ensure that the program review process meets the guidelines and expectations set forth in the program review guidelines
3. Assist department processes to develop the pre-visit materials (Self-Study, itinerary, folders, etc.)
4. Facilitate the EPRT’s site visit:
   a. Initiate the review process and maintain alignment with the timeline.
   b. Distribute materials (itinerary, Self-Study, etc.) to review team and other campus administrators.
   c. Guide the administrative assistant to facilitate all travel, meals and other logistics.
   d. Guide the scheduling of interview times for constituents to meet with members of the review team.
5. Guide the Student Life Finance and Administration team in the procurement of NetIDs and payment of honorariums.
6. Oversee all communication with the review team before and after their site visit (including thank you notes, survey links, etc.)
7. Ensure the department Response is entered into Heliocampus within one semester of the receipt of the EPRT’s findings.
8. 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: Program Review Staff Writing Team

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 solution
   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:

I. Department Executive Summary

   a. Department Introduction
      i. Department history
      ii. Organizational framework (org charts)
      iii. Constituents served
      iv. Departmental strategic plan

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

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

II. 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 utilize the SAG to provide information regarding each of the standards in the Self-Study. 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>
<td></td>
</tr>
</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 to discuss 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

<table>
<thead>
<tr>
<th>Start Time</th>
<th>End Time</th>
<th>Event</th>
<th>Location</th>
<th>Staff Host</th>
</tr>
</thead>
<tbody>
<tr>
<td>5:45 pm</td>
<td>6:00 pm</td>
<td><strong>Depart Hotel</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6:00 pm</td>
<td></td>
<td><strong>Welcome Dinner</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>External Program Review Team (EPRT) [NAME], Associate/Assistant Vice Chancellor [NAME], Director of [DEPARTMENT] Dr. Melissa Brown, Director of Assessment and Strategic Initiatives (DASI)</td>
<td></td>
<td></td>
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</tbody>
</table>

## Monday

<table>
<thead>
<tr>
<th>Start Time</th>
<th>End Time</th>
<th>Event</th>
<th>Location</th>
<th>Staff Host</th>
</tr>
</thead>
<tbody>
<tr>
<td>7:45 am</td>
<td>8:00 am</td>
<td><strong>Depart Hotel</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8:00 am</td>
<td>9:30 am</td>
<td><strong>Catered Breakfast Executive Leadership</strong> 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</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Accessing campus WIFI:
1. Select UT Open
2. Use your NetID and password as if logging into Heliocampus
3. Answer “yes” to staff
4. When rerouted, follow steps to register
5. Finally, login to Eduroam (use full e-mail address and password)
   If you are not successful accessing the campus WIFI after these steps, call OIT Helpdesk directly at 865-974-9900.

<table>
<thead>
<tr>
<th>Time</th>
<th>Time</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>9:30 am</td>
<td>9:40 am</td>
<td>Break</td>
</tr>
<tr>
<td>9:40 am</td>
<td>10:40 am</td>
<td><strong>Department Director/Guided Tour of Facilities</strong></td>
</tr>
<tr>
<td>10:40 am</td>
<td>11:00 am</td>
<td>Break</td>
</tr>
<tr>
<td>11:00 am</td>
<td>12:00 pm</td>
<td><strong>Department Staff</strong></td>
</tr>
<tr>
<td>12:00 pm</td>
<td>1:30 pm</td>
<td><strong>Catered Lunch</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td>EPRT Only</td>
</tr>
<tr>
<td>1:30 pm</td>
<td>2:30 pm</td>
<td><strong>Student Life Leadership Team</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td>(Divide EPRT)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Group A – [NAME],</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Group B – [NAME],</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Group C – [NAME]</td>
</tr>
<tr>
<td>2:30 pm</td>
<td>2:40 pm</td>
<td>Break</td>
</tr>
<tr>
<td>2:40 pm</td>
<td>3:40 pm</td>
<td><strong>Stakeholder Group 1</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td><em>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.</em></td>
</tr>
<tr>
<td>3:40 pm</td>
<td>3:50 pm</td>
<td>Break</td>
</tr>
<tr>
<td>3:50 pm</td>
<td>4:50 pm</td>
<td><strong>Stakeholder Group 2</strong></td>
</tr>
<tr>
<td>4:50 pm</td>
<td>5:00 pm</td>
<td>Break</td>
</tr>
<tr>
<td>5:00 pm</td>
<td>6:00 pm</td>
<td><strong>Student Stakeholder Group</strong></td>
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<tr>
<td>6:00 pm</td>
<td></td>
<td><strong>Catered Dinner &amp; Process Time</strong></td>
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<tr>
<td></td>
<td></td>
<td>EPRT Only</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>
</tr>
</thead>
<tbody>
<tr>
<td>7:45 am</td>
<td>8:00 am</td>
<td>Depart Hotel</td>
<td>EPRT Only</td>
<td></td>
</tr>
<tr>
<td>8:00 am</td>
<td>9:00 am</td>
<td>Catered Breakfast</td>
<td>EPRT Only</td>
<td></td>
</tr>
<tr>
<td>9:00 am</td>
<td>10:00 am</td>
<td>Stakeholder Group 4</td>
<td>EPRT Only</td>
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</tr>
<tr>
<td>10:00 am</td>
<td>10:10 am</td>
<td>Break</td>
<td>EPRT Only</td>
<td></td>
</tr>
<tr>
<td>10:10 am</td>
<td>11:10 am</td>
<td>Stakeholder Group 5</td>
<td>EPRT Only</td>
<td></td>
</tr>
<tr>
<td>11:10 am</td>
<td>11:20 am</td>
<td>Break</td>
<td>EPRT Only</td>
<td></td>
</tr>
<tr>
<td>11:20 am</td>
<td>12:20 pm</td>
<td>Meeting with Department Director</td>
<td>EPRT Only</td>
<td></td>
</tr>
<tr>
<td>12:20 pm</td>
<td>2:00 pm</td>
<td>Catered Lunch &amp; Process Time</td>
<td>EPRT Only</td>
<td></td>
</tr>
<tr>
<td>2:00 pm</td>
<td>2:30 pm</td>
<td>Preliminary Findings: Leadership</td>
<td>EPRT Only</td>
<td></td>
</tr>
<tr>
<td>2:30 pm</td>
<td>3:00 pm</td>
<td>Preliminary Findings: Staff</td>
<td>EPRT Only</td>
<td></td>
</tr>
<tr>
<td>3:00 pm</td>
<td>3:30 pm</td>
<td>Wrap Up</td>
<td>EPRT Only</td>
<td></td>
</tr>
<tr>
<td>3:30 pm</td>
<td></td>
<td>EPRT Departure</td>
<td>EPRT Only</td>
<td></td>
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</table>

*Leadership also attends*

**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
### Sunday Evening

<table>
<thead>
<tr>
<th>Start Time</th>
<th>End Time</th>
<th>Event</th>
<th>Location</th>
<th>Staff Host</th>
</tr>
</thead>
</table>
| 6:00 pm    |          | **Kickoff Meeting**  
External Program Review Team (PRT)  
[NAME], Associate/Assistant Vice Chancellor  
[NAME], Director of [DEPARTMENT]  
Dr. Melissa Brown, Director of Assessment and Strategic Initiatives (DASI) |          |          |

### Monday

<table>
<thead>
<tr>
<th>Start Time</th>
<th>End Time</th>
<th>Event</th>
<th>Location</th>
<th>Staff Host</th>
</tr>
</thead>
</table>
| 8:00 am    | 9:30 am    | **Executive Leadership** Team  
Dr. Cuevas, Vice Chancellor  
[NAME], Assistant Vice Chancellor  
[NAME], Assistant Vice Chancellor  
[NAME], Assistant Vice Chancellor  
[NAME], Associate Vice Chancellor |          |          |
| 9:30 am    | 9:40 am    | Break |          |            |
| 9:40 am    | 10:40 am   | **Department Director/Guided Tour of Facilities** |          |            |
| 10:40 am   | 11:00 am   | Break |          |            |
| 11:00 am   | 12:00 pm   | **Department Staff** |          |            |
| 12:00 pm   | 1:30 pm    | Lunch Break |          |            |
| 1:30 pm    | 2:30 pm    | **Student Life Leadership Team**  
(Divide PRT/Breakout rooms)  
Group A – [NAME]  
Group B – [NAME]  
Group C – [NAME] |          |            |
### Tuesday

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

*Leadership also attends*
Appendix J: 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 outcomes 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 outcomes 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?
Appendix K: Executive Leadership Team Breakfast Agenda

Executive Leadership Team Breakfast Agenda

Charge to External Program Review Team

I. Introductions lead by Vice Chancellor for Student Life

II. Department highlights from perspective of Executive Leadership Team

III. Expectation of the EPRT
Appendix L: External Review Team Celebrations & Recommendations

The EPRT will address each standard in Heliocampus. This 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. 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.

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 into Heliocampus within each standard.

Appendix N: Department Implementation Plan and Tracking Spreadsheet

This spreadsheet should be used to outline the department strategic plan for the next five years until the next program review. The template for this can be found in the Office of Student Life Assessment and Strategic Initiatives Share Point site under helpful documents and templates.
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 review team member 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 recommendations/opportunities for improvement related to operations/services, programs, and staffing/staffing structure
   b. Challenges/limitations with review process (if applicable)
   c. Discuss clarification needed regarding information to complete findings in Heliocampus

III. 2nd part with (1st part attendees plus department staff) 30 Minutes
   a. Initial findings/observations
   b. General opportunities for improvement, not to include staffing/staffing structure
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.

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**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.*