Nuts and Bolts of Leading an Accreditation Self-Study

Pre-Conference Workshop for the 5th Annual Drexel Assessment Conference  September, 2018
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Workshop Outline

- Introductions
- Workshop Goals: Participant Perspective
- Self-Study: A Continuous Process of University Self-Reflection
- Action! Ready .... (Leadership)
- Action! Set ..... (Resources)
- Action! Go.... (The Plan)
Ready, Set, Go!
Introductions
High expectations are the key to everything.

Sam Walton
• MSCHE 14 Standards, Research Questions Basis
  • My role: Resource as AVPAA, Steering Committee Member, Manager of Final Product, not ALO

• MSCHE 7 Standards, Strategic Planning Synergy
  • My role: Steering Committee Co-Chair, Director of Assessment, then AVPUA, Manager of Final Product, not ALO
Participants will:

• Identify internal processes already in place that can facilitate a self-study and ensure its relevance “after the visit”.

• Evaluate possible involvement of senior leadership approaches ranging from intense oversight and editing privileges to the hands off and give me the results executive.

• Think through the data repository, availability of applicable documents, and future retrieval of these documents.

• Analyze the integration of strategic initiatives and the self-study.

• Create an “ideal” steering committee and strategize how to involve some key personnel.

• Develop a network of peers for professional support.
Self-Study

- PURPOSEFUL: Re-Affirmation of Accreditation
- USEFUL: Mission Effectiveness & Strategic Planning
- MEANINGFUL: Engagement of Stakeholders to Produce Good
- LOOKING BACKWARD AND FORWARD: Who are we, how did we get here, who will we be?
Now that we have introduced ourselves, please re-gather as working groups for this workshop.
- Divide and conquer?
- Keep the institution members together?
- Who intrigued you as part of the introductions?
- What can you gain or share with others?
Identify internal processes already in place at your institution that can facilitate a self-study and ensure its relevance “after the visit”.

- What committees or structures currently support assessment and program evaluation at the institution?
- Can these be employed as a steering committee?
- If not, how should the Steering Committee be structured?
- What role will you have within the Steering Committee?
Your Role

- Guide on the Side
- MSCHE Champion
- Project Manager
- Solo or Partner
Action!
Ready
(Leadership)

- Who’s on board?
- Who should be on board?
- Not on board?
Action! Ready (Leadership)

• **Build your team! Part 1. Steering Committee**
  • At your campus, who *should* be part of the Steering Committee for the Self-Study?
  • Who would you *like* to be a part of this process?
  • Who would be a *derailer*? Is that voice a critical component of necessary conversations?
  • Who has the *information*? What role should that person play? Direct or indirect involvement?
  • **Size matters** – there is a lot of work to be done in a timely fashion!
  • Have you accounted for *ALL stakeholders*? Board, students, alumni, staff?
Feedback on Discussion

THE AHA! MOMENT
Break – 10 minutes
Part 2: Discussion

- Evaluate possible involvement of senior leadership approaches ranging from intense oversight and editing privileges to the hands off and give me the results executive.
  - What is the leadership style of top administers? President, Provost, Deans
  - To whom should the Steering Committee Chair(s) report? How often? Through what format?
Note to Self:
• The President/Provost makes the final decisions!
• The Accreditor communicates with the President.
• What is your plan for communication with leadership?
Action! Set ..... (Resources)

• Back to Leadership
• The President invites participants to the Steering Committee and auxiliary support and service teams.
• Who can say no to such an invitation?
• The President thanks participants for their service.
Feedback on Discussion

THE AHA! MOMENT
Discussion – Part 3

• Think through the data repository, availability of applicable documents, and future retrieval of these documents.
  • MSCHE requires a document roadmap.
    • Who has access to the institution’s primary documents?
    • Where are they stored?
    • How much is public access? Website? Internal Document retrieval site?
• Where will you store e-documents so that they are available to the Steering Committee and working groups, Chair and Visiting Team, and Institutional constituents?
• Who will support the structure for document and data warehousing. IT personnel?
Action! Set ..... (Resources)
Action! Set ..... (Resources)
Action! Set ..... (Resources)
Action! Set.....(Resources)

- SharePoint Exploration (Microsoft Users)

- Google Docs Exploration (Apple or iOS users)
  - https://support.google.com/docs/answer/2494822?co=GENIE.Platform%3DDesktop&hl=en

- Explore the above resources. Which one is most useful for your institution? Do you have managerial access? What platform is most in use at your campus? How are meetings scheduled? Meeting reminders? Meeting archives? Document archives? Communication with and among team members? IT support? Internal/Outside access to stored documents and files? File security?
• So, What’s YOUR Plan for Resource Utilization and Resource Allocation?
Action! Set ..... (Resources)

• RESOURCE FOLKS!
  • Administrative Assistants
  • Institutional Research, Data Management, Registrar, Institutional Policies, Deans, IT Support, Archivist, to name a few.
  • WRITERS and EDITORS and REVIEWERS
  • Hospitality Coordinators, Public Safety, Facilities, Marketing, to name a few more.
• Build your support team!
• Decide your document repository.
• How will you organize your meeting materials?
• Who has access to what?
Feedback from working groups
Part 4
Discussion

• Analyze the integration of strategic initiatives and the self-study.
  • MSCHE is looking for the institution to integrate strategic directions within the self-study. This usually involves the institution’s strategic plan. What is the status of strategic planning at your institution? How can this be intersected with the Self-Study process?
  • What are the key strategic initiatives of most importance to the institution at this time?
  • What will be the synergy between the Strategic Planning Committee(s) and the Self-Study Steering Committee?
Action! Set..... (Resources)
Break – 10 minutes
Resources for your Self-Study
MSCHE Training and Guidelines

- [http://www.msche.org/publications_view.asp?idPublicationType=11&txtPublicationType=Manuals+on+Accreditation+Protocols](http://www.msche.org/publications_view.asp?idPublicationType=11&txtPublicationType=Manuals+on+Accreditation+Protocols)

- GO TO THE TRAINING MEETING (BY INVITATION) WITH YOUR KEY PARTNER(S) OR TEAM!
• The process to be used for the Self-Study will differ by the Accrediting Agency, their Standards, and year of implementation.
Action! Go ..... 
(The Plan)

• What do you need to become familiar with?
  • What are the expectations of your accreditor?
  • What is your previous experience with accreditation processes?
  • Have you been a team member for an accreditation visit?
  • Have you been to an Accreditation Conference?
• What’s your plan for professional development?
• Create an “ideal” steering committee and strategize how to involve some key personnel.
  • The Self-Study requires a lot of work, the ability to meet deadlines, and the broad involvement of the campus community. Who from your campus has the qualifications to assist in this process? Who, although willing, may impede the process?
  • What role should senior leadership play with and within the Steering Committee?
  • Will faculty request course release for their participation if named as a Steering Committee member?
  • Is there a natural structure within your campus schedule to hold meetings for maximum attendance?
Action! Go ..... (The Plan)

- At minimum, a 2-Year Process to be ready for the Accreditation Visit. There are DEADLINES to be met!
- Period of intense engagement, followed by a continuum of moving forward according to the “PLAN”
- **Self-**Recommendations and Action Plan based on the Self-Study are critical, and will provide accountability moving forward.
- You and your university should be “in charge” not the Accrider! This is **YOUR** self-study.
- After the re-affirmation of accreditation, **annual institutional updates (AIU)** based on the self-study and recommendations.
Feedback on Discussion
Communication is Key
Communication Planning

• How will your university be prepared for the accreditation process and visit?
• How will you market the opportunity that comes from a self-study?
• How will your constituents become a part of the self-study?
• How will the university be educated about the self-study, your on campus process, and the importance of regional accreditation?
• Whose voices will be heard?
• Who will tell “your story”?
• How will the story be re-told and re-membered beyond the visit?
Communication Plan

- Newsletters and updates
- Open portal for self-study information and drafts
- Updates at campus leadership meetings
- Community meetings and open forums
- Wide-spread participation in sub-committees
- Invite feedback via email or surveys
- *Purpose of the Self-Study* mantra “Re-Affirmation of Accreditation”
- Continuous updating on accreditation news and events, updates, and status
Action! Go ..... (The Plan)

• So, what’s YOUR Plan for Communication?
Feedback from working groups
Discussion – Part 6

• Develop a network of peers for professional support.
  • Within the Steering Committee, Co-Chairs provide peer support.
  • Who will you seek out for peer support?
    • At institution.
    • Outside of the institution.
  • Information exchange among participants
Action! Go ..... (The Plan)

• THE MOST IMPORTANT DATE IS THE START DATE!
### BUSINESS ACTION PLAN

**GOAL**

Write your goal statement here.

<table>
<thead>
<tr>
<th>ACTION DESCRIPTION</th>
<th>PARTY / DEPT RESPONSIBLE</th>
<th>DATE TO BEGIN</th>
<th>DATE DUE</th>
<th>RESOURCES REQUIRED (staff, tech, etc.)</th>
<th>HAZARD FORECAST</th>
<th>OUTCOME</th>
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Action! Go ..... (The Plan)
Action! Go ..... (The Plan)

- HAZARD FORECAST
- SCENARIO PLANNING

- WHAT COULD POSSIBLY GO WRONG?
- WHAT COULD POSSIBLY GO RIGHT?

H551: Causes hangovers
Questions are guaranteed in life; Answers aren't.
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• https://georgian.edu/institutional-assessment-and-accreditation/
• www.georgian.edu/assessment
THANK YOU!