

# **Guidelines for Assessment Visits to Administrative Departments**

## **Prepared by the Provost's Office, November 15, 2017**

Muhlenberg College is committed to continuous improvement in all areas of our operation. Supporting this process, we have long pursued a process of visitation and assessment of individual departments.

### **Overarching Goals**

Visiting assessment teams provide an opportunity for reflection and discussion aimed at strengthening our administrative departments, which benefit from outside perspectives and informed feedback about their particular operations and objectives. The visiting team process is very much a partnership between the department and the visiting team.

The spirit of these visits should be lively and informal – a shared focus on the work of the department will animate discussions and create a collaborative environment within which the visit can take place.

Visiting teams serve four primary purposes:

1. Provide a regular opportunity for self-assessment combined with the fresh perspective of an external review;
2. Examine the operation and objectives of the department and the department's effectiveness in meeting those objectives;
3. Assist a department in articulating its strengths and challenges; and
4. Deliver a written report by the visiting team that includes recommendations for departmental development and progress.

### **Departmental Briefing Materials**

The department should prepare a comprehensive self-study report to provide the visiting team with the information it needs to assess the effectiveness of the department in fulfilling its mission and to allow it to provide suggestions for departmental development. The department should particularly include material that will highlight issues the department believes will be useful in discussions with the visiting committee. Departments are urged to use or modify information from their previous self-study report(s) when relevant for the current self-study. See Appendix #1.

All briefing materials should be submitted digitally; if it desires, the department may prepare a briefing box of materials that may not be easily digitized and make it available to the team when it arrives. Provide current résumé and job description for each department member and other material the department wishes to include (e.g., departmental publications, project or event descriptions, etc.).

### **Team Composition**

Visiting teams are composed of two invited experts from other liberal arts colleges, one of whom serves as the team leader. No later than April 1 of the spring before the academic year in which a department will undergo an assessment review, the relevant Vice President should provide the President's Office a ranked list of five to six experts from other institutions who

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would serve capably as the team leader and second visiting expert. The Vice President should confer with the Director of the administrative unit being reviewed. Based on our history of past team visits, those individuals from institutions with comparable resources and similar educational missions make the best team leaders, as well as those who have experience serving on similar assessment teams at other institutions. If appropriate to the department, the second visiting expert should have comparable but contrasting experience from the team leader. Pertinent professional organizations may have resources to help departments identify experienced assessment experts.

### **Visit Preparation**

A representative of the President's Office will reach out to the department head early in the spring of the academic year preceding the regularly scheduled assessment visit to request the list of proposed team members. The President and appropriate vice president will select the team members, reach out to them to secure their participation, and the President's Office will work with the team and the department head to identify the visit date.

The President's Office will coordinate and fund all travel and accommodations for the visiting team; coordinate all meeting logistics; issue all meeting invitations and track responses; and pay honoraria to visiting team members.

No later than six weeks prior to the visit date, the department head must submit all briefing materials digitally to the President's Office. Questions concerning briefing materials should be directed to the vice president and Provost; questions concerning visit planning and logistics should be directed to the President's Office.

No later than five weeks prior to the visit date, the department head must submit the following lists to the President's Office :

1. Department personnel the team will need to interview, along with any conflicts staff may have on the meeting day;
2. Students (a list of at least 24; 30 is better) who interact with the department in meaningful ways;
3. Faculty and/or staff who interact with the department and who can speak to the department's strengths and challenges (this list can be as large or small as is necessary);
4. Depending on the department, it may wish to submit lists of alumni or community partners the team should interview, as well; this is not a requirement of all departments.

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### **The Campus Visit**

The team prepares for its visit by reviewing briefing materials prepared by the department in consultation with the appropriate vice president and the vice president and dean of institutional effectiveness and planning. During the visit, team members meet with the president, the department head and appropriate members of the department, as well as other administrators, faculty and/or students as appropriate. Meetings are intended to be collaborative and conversational in tone and format.

**Day One:** the department head will attend an initial dinner with the visiting team, the president and appropriate vice president. No one else from the department attends this dinner.

**Day Two:** the team meets over breakfast with the entire staff of the department in early morning, then meets with staff individually or in small groups through the morning and early afternoon (if necessary) on the meeting day. The President's Office will work to tailor the interview schedule to avoid any conflicts staff may have.

The team will meet over lunch with students who interact with the department in meaningful ways. A list of up to 30 students is ideal, as many may have class conflicts. Inviting 30 usually yields 12-16, which is a good group for a conversation.

The team meets in late afternoon with campus-wide colleagues (faculty and/or staff) of the department's choosing with whom it interacts in a meaningful way. This list can be as large or as small as is necessary, but remember that not everyone who is invited may be available to attend a meeting.

The team has dinner with the entire department at the end of the second day. This is considered a working dinner, where the results of the day's interviews are discussed and the team can ask questions of department members.

**Day Three:** this is the team's work day; under normal circumstances, no one from the department needs to be available on the work day. The team will meet with the appropriate vice president for an oral report at mid-morning of the work day. The vice president will then relay the results of the oral report to the president and department head.

Other visit schedule models have proven successful for much larger or relatively small departments; department heads should consult with the President's Office if they would like to discuss an alternate visit schedule.

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### **After the Visit**

The department head should reach out to express her/his gratitude to all non-departmental interviewees.

The department should receive the team's written report, which addresses the questions described in the guidelines (below), approximately three weeks following the visit. Within three weeks of receipt, the department should meet to discuss the report, prepare a brief response that responds to the main points made in the report, and share that response with the president and appropriate vice president.

The department should then express their gratitude to the members of the team for their work on the visit and report.

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### **APPENDIX #1**

#### **Sample Outline for an Administrative Self-Study Report**

#### **Table of Contents**

##### **Executive Summary**

Provide a 1-2 page overview of the briefing report.

##### **Overview**

Provide an introduction to the department summarizing the recent history and any significant changes that occurred in staffing or program development in the past seven years. Outline the department's mission, goals and how they relate to the mission of the College and to summarize department's timeline etc. Documents outlining professional standards could be put in a separate document box.

##### **Progress on Recommendations from Previous Visiting Team Report**

Departments should review the previous visiting team report and provide a brief update addressing the status of recommendations in the report.

##### **Staff**

Provide information about each staff member (education, specialization), as well as a current resume for each staff member.

##### **Resources/Facilities**

Describe department resources (three years of department budgets), facilities and equipment if relevant.

##### **Department Outcomes**

Summarize specific description of results generated by the department, targets met, goals achieved, etc. (since the last review)

Provide a specific description of department operations, timelines, etc.

##### **Department Goals**

Outline the department's goals for the next 8 years.

##### **Strengths/Weakness**

Summarize the department's strengths and weakness and note any specific concerns the department has in regard to its ability to fulfill its current mission and goals.

All briefing materials should be submitted **digitally**; if it desires, the department may prepare a briefing box of materials that may not be easily digitized and make it available to the team when it arrives. (Department Publications)

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### **Appendix #2**

#### **General Guidelines for Visiting Team Reports**

The goal of the external review is to help departments maintain their current strengths and identify opportunities for growth and improvement. The review also provides departments the opportunity to reassess their goals, directions, and strengths in teaching, research, and service. The team visit should focus on administrative, operational and programmatic functions of the department and not on the strengths or weaknesses of any one individual.

The visiting team report is based on a review of the department's self-study report and supplemental materials, as well as information acquired through meetings with department faculty and staff, students, and faculty affiliated with the department

#### **The team report should address:**

1. The extent to which the department's mission and goals are aligned with the College mission.
2. The effectiveness of the department in fulfilling its mission and goals.
3. The extent to which the structure and offerings in the department are consistent with national trends in the discipline.
4. The extent to which department resources meet needs and are being used effectively.
5. The extent to which the department's future goals are reasonable given its mission and the College mission.

#### **The team report should include:**

1. An explanation of the procedures followed by the visiting team.
2. An evaluation of the evidence included in the Self-Study.
3. An outline of the strength and weaknesses of the department.
4. Recommendations about resources, and internal operations of the department where appropriate.

#### **The team leader should ensure that the report has not:**

1. Been written in a highly prescriptive manner
2. Named individuals, either in praise or blame
3. Focused on trivial issues.
4. Suggested changes that necessitate a significant increase in resources (including additional staffing).
5. Advocated the personal educational theories of any of the team members or professionals.

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### **General Guidelines for Visiting Team Reports**

The visiting team's report will normally address the following kinds of questions:

1. Are the department's mission and primary objectives appropriate, given the overall mission of the College?
2. What are the department's major operational strengths? Are there major operational challenges?
3. Given the available resources, are there ways that the department could more effectively use space, equipment, or staff to fulfill department mission and objectives? If there is underutilized space, equipment, or staff time, how might it be redeployed? If there is insufficient space, equipment, or staff time, which resource needs are most pressing?
4. Is the department meeting its goals, achieving its targets, and generating appropriate results? Is the department adequately supporting strategic priorities?
5. What goals should the department aim to achieve prior to the next review?