*When you prepare for a periodic program review (PPR) of a Stockton graduate or undergraduate academic offering/Academic Affairs unit, you will want to make sure you have considered or completed the following.*

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| Guidelines and Timeline for Periodic Program/Unit Review | | |
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| **Action Step:** | | **Date:** |
| *1* | Academic Affairs notifies school Deans of upcoming PPRs. Deans work with programs to verify the faculty who will lead the PRR and ensure compensation is set for the following academic year. | February 15 |
| *2* | Programs contact Institutional Research (IR) to request alumni survey, if desired/necessary. | March 15 |
| 3 | Office of the Provost provides Institutional Research (IR) with the schedule of the upcoming academic program/unit 5-year reviews. | July 15 |
| 4 | Academic Affairs sends Chairs of effected programs/units the Periodic Program Review timeline, guidelines, template for the narrative report, template for the curriculum map, and the previous Periodic Program Review and the Close the Loop memo, if available. | July 15 |
| 5 | Institutional Research collects the available data, creates Tableau workbooks, and uploads the workbooks to the effected program/unit folders in the Blackboard course titled Academic Reports.  For Graduate Program Chairs: Graduate Admissions can prepare a recruitment summary if you contact the office by this date. | September 15 |
| 6 | The Provost Office (Assistant Vice President, AVP) schedules a virtual "Begin the Process" meetings with Chairs/Directors who are responsible for the Periodic Review. | September 15 -  September 30 |
| 7 | Periodic Review Report writers consult with program faculty/unit staff to identify a possible consultant (considering size/type of institution, nature of program curriculum, and consultant's assessment/program evaluation experience) and forwards the CV of the recommended consultant to the Dean/supervisor. | October |
| 8 | Dean/supervisor submits the CV of the recommended consultant to the Office of the Provost for review and final approval. | November 15 |
| 9 | Deadline for requests to Institutional Research for additional data. | November 15 |
| 10 | Periodic Review Report writer completes the draft and submits it to the Dean/supervisor for review. | December 1 |
| 11 | Office of the Provost communicates approval/no approval of the recommended  consultant to the Dean/supervisor and the Periodic Review Report writer. | December 1 |
| 12 | Once a consultant is selected and approved, the Dean/supervisor and the Periodic Review Report writer begin to organize arrangements/agenda for the consultant visit.  Periodic Review Report writer/staff person consults with the Office of the Provost regarding scheduling the consultant visit on a day/time when the Provost staff is available to meet with the consultant. | December |
| 13 | Dean/supervisor makes revision suggestions to the Periodic Review Report  writer. | December 15 |
| 14 | Periodic Review Report writer completes revisions and forwards the final version of the review to the Dean/supervisor. | By  December 31 |
| 15 | Dean/supervisor sends the final version of the review to the approved consultant. | First week of January |
| 16 | Dean/School staff finalizes arrangements (virtual visit) for the consultant visit and, with the Periodic Review Report writer, finalizes the agenda, making sure to include meetings with faculty, students, the Dean, Dean of the School of General Studies, Office of the Provost, Director of the Library, and an exit meeting with the Periodic Review Report writer and the Dean. | First day of the spring term |
| 17 | The consultant sends the report to the Dean/supervisor, who forwards the consultant's report to the Periodic Review Report writer and to the Office of the Provost. Only after the consultant’s report is received is payment to the consultant issued. | By April 2 |
| 18 | The Periodic Review Report writer consults with program faculty/unit staff and writes the program's response/unit’s response to the consultant's report and sends it to the Dean/supervisor. | April 15 |
| 19 | Dean/supervisor writes their response and sends the program's response/unit staff’s response and the Dean's response/supervisor’s response to the Office of the Provost. | April 30 |
| 20 | Office of the Provost schedules a "Close the Loop" meeting with the Dean/supervisor, the Periodic Review Report writer, the Provost, the Assistant Vice President (AVP) to discuss the Periodic Review process and to set goals for the next Periodic Review. If the Periodic Review Report writer is not the Chair/Director, the Chair/Director will also be invited to the “Close the Loop” meeting. | April 30 –  June 30 |
| 21 | The AVP creates a draft Close the Loop memo, itemizing action items discussed in the meeting and sends the memo to those who attended for their review/approval. The AVP revises the memo in response to suggestions from those who attended the Close the Loop meeting and, once finalized, posts the memo to the Office of the Provost share drive. | A week/two weeks after the Close the Loop meeting |
| 22 | A program/unit that undergoes a Periodic Review in a given year does not also have to complete the annual report for that year. |  |

**Tips for a Productive Periodic Program/Unit Review**

## PLEASE NOTE:

* All degree granting programs, interdisciplinary minors, other academic offerings (such as Honors or First-Year Seminars), and units/Centers/Institutes within Academic Affairs undergo periodic review.
* Directors of Academic Affairs units/Centers/Institutes should follow the tips below for Chairs of academic programs.
* For the purposes of this document, “program” means undergraduate and graduate degree granting programs as well as interdisciplinary minors and other academic offerings.
* Directors of Academic Affairs units/Centers/Institutes should consider “program” their unit/Center/Institute.

As a Periodic Review Report writer, you will receive access to Tableau workbook from Institutional Research (IR) at the beginning of September of the academic year for your program review; please check the folder for your program in the Blackboard course titled Academic Reports, download the Tableau Reader, and look over the data/information as soon as you can.

Graduate Directors who would like a recruitment summary should request one from the Graduate Admission Office by September 15.

Generally, the Program Chair/Director writes up the Periodic Program Review report. However, the Chair/Director may choose another program faculty member, or group of program faculty members, to write the report. The writer, or writers, receives compensation for this work. Please see the Memorandum of Agreement for the compensation.

If you need revised or additional data/information, please contact IR with your request before November 15.

By the first program meeting of the academic year, the Periodic Review Report writer, in consultation with program faculty members, should discuss possible consultants. When a consultant is selected, the Periodic Review Report writer should forward the consultant’s name and CV (and any other pertinent information) to the Dean. The Dean will evaluate the potential consultant and either approve or deny the program’s recommendation. If the Dean approves the program’s choice, he/she will forward the consultant’s name and CV (and any other pertinent information) to the Office of the Provost, for their review and final approval.

When selecting a consultant, consider the following:

* 1. Has the selected person ever consulted before or performed an external review?

*It is, of course, better if the selected person has, as he/she will be versed in the process.*

* 1. Does the selected person have experience or expertise in assessment practices appropriate to the discipline? *It is critical that the consultant has an assessment, program evaluation, or regional accreditation background.*
  2. Is the selected person familiar with public, liberal arts college missions and with Stockton’s version of General Studies/interdisciplinary curriculum? *If the selected person does not have an assessment background, then, it might be better to choose another consultant who does? However, if the selected person understands the mission of a public liberal arts college but does not fully “get” Stockton’s General Studies program, the Chair/Director and program faculty should make a point of schooling the consultant.*
  3. Is the selected person an expert in area(s) aligned with Stockton’s program discipline/fields?   
     *The selected person could be just brilliant, but an expert in some aspect of the discipline far removed from the research focus of the Stockton faculty or the design of Stockton’s program curriculum. If that’s the case, you might want to reconsider using this consultant.*
  4. Is the selected person open-minded and forward thinking about pedagogy, course delivery, and course design? *The selected person should be open-minded and aware of changes in the higher education landscape. Someone who is not may prove an ineffective consultant.*
  5. Does the consultant work at a nearby, competing institution? *If the consultant works at a school that competes with Stockton for students or for prestige, that consultant may not perform the best review.*

Once the program and the Dean agree on the consultant, and the consultant has been approved by Office of the Provost, the Dean in consultation with the Periodic Review Report writer should begin working on the agenda for the consultant’s visit.

The agenda should include meetings with:

* the Chair/Coordinator/Director
* the Provost and Provost Office staff
  + the Dean of the program’s academic School
  + the Dean of the School of General Studies (for undergraduate programs)
  + the Director of the Library (as appropriate)
  + program faculty (including adjuncts/School faculty or associated program faculty (as appropriate)
  + Students, if possible

Many agendas also include a meeting with students, a class visit, or time to review relevant documents (syllabi, student work, assessment instruments, capstone portfolios, metrics, data collection processes, etc.). In addition, the consultant might benefit from a [virtual campus tour](https://stockton.edu/admissions/visit-us.html) to see program facilities, the library, computer labs, tutoring centers, and other relevant campus locations.

## All agendas should include a break or two.

A gathering at the end of the day with the consultant, the Coordinator/Director, and the Dean is a good idea, as the Consultant may have questions or confusions that need answers/clarification.

Firm up the date for the consultant’s visit as soon after selecting the consultant as possible. The Dean usually contacts the consultant and makes arrangements for the consultant’s visit to the campus. The visit should take place before spring break, if possible. Make sure to confirm the date with the Office of the Provost, to schedule the consultant’s meeting with the Provost and the Provost Office staff.

Because there are a few months between scheduling the consultant’s visit and its occurrence, the Periodic Review Report writer will want to periodically check in with the consultant to answer questions, to clarify the process, and to communicate appropriate information about the program/Stockton. This will go a long way toward educating the consultant and, as a result, guiding the consultant to make the most of their visit and to produce the most meaningful report possible. The Periodic Review Report writer should also instruct the consultant in the format for and the purpose of the periodic review. The Periodic Review Report writer should make the current periodic review, the previous periodic review/previous Close the Loop memo, Tableau workbook, and relevant templates available to the consultant.

Mostly, the Dean, the Periodic Review Report writer, and the program faculty look for the consultant to describe program strengths and weaknesses and to make recommendations.

The consultant should structure the report according to the template for the consultant’s report.

Focus is crucial, as is brevity and clarity. The Periodic Review Report writer should emphasize this to the consultant. These reports can get long, rambling, and distracted. The Periodic Review Report writer can’t prevent a consultant from producing an unwieldy report; however, one can try to steer the consultant toward a focused one.

The periodic review process should be meaningful and should lead to program improvement. The consultant contributes to the review process by offering a view from outside; if the consultant works for a national organization, they may also offer a view from the field. In either case, the consultant’s observations, when astute and informed, can be just the impetus a program needs to initiate necessary changes.

The Periodic Review Report writer should write up the periodic review draft and submit it along with any appendices to the Dean by December 1.

The Dean reviews the report, sending it back to the Periodic Review Report writer for revisions if necessary. All revisions to the report should be completed by the end of December. Once the report is finalized, the Dean sends the report and any appendices to the consultant. The consultant should receive the report by the first week of January. When the Dean sends the review to the consultant, also send a copy to the Office of the Provost.

The Dean and the Periodic Review Report writer should instruct the consultant to write up and return their consultant’s report by April 2nd.

The Dean and the Periodic Review Report writer should both write up responses to the consultant’s report and submit them, along with the consultant’s report to the Office of the Provost. The Program’s response is due by April 15. The dean’s response is due by April 30. The dean will send all documents to the Provost’s Office by April 30.

After receiving the various reports and responses, the Office of the Provost will schedule a “Close the Loop” (CTL) meeting with the Dean, the Coordinator/Director, the Provost, the Associate Provost, the Periodic Review Report writer, and others.

Shortly after the CTL meeting, the AVP will draft a CTL memo, recapping the meeting and indicating any action/discussion items. This memo goes to the Dean and the Periodic Review Report writer and to all others who attended the meeting. Those who receive it should review it and communicate any needed revisions, additions, deletions to the AVP, who will revise the memo and send around a final version. Those who attended the CTL meeting can suggest revisions to best represent the conversation during the meeting. The Periodic Review Report writer might also reformulate a goal, for instance, if he/she has spoken with program faculty and anticipates, as a result, that only a small step can be accomplished in the upcoming year.

The average consultant honorarium is $1,500; this amount is covered by the Provost Office.

If a virtual visit is not possible and a consultant requires an overnight stay; the additional charges for travel, meals, etc. are covered the coordinator’s School. Check with your school dean before arranging travel.

Some further suggestions:

* + Consider approaching the review as an opportunity for reflection.
  + The Periodic Review Report writer will want to consult annual reports and, if available,

the previous periodic review. Looking at the goals and action items and writing about the ways in which previous years’ goals and the action items from the previous periodic review have been addressed is a good idea.

* + Less is more, and less should be clear, focused, and intentional.
    - The Periodic Review Report writer may want to consider meeting with the Director of

[Academic Assessment](https://stockton.edu/ctld/academic-assessment-and-scholarship.html) prior to writing up the report in order to get some assessment guidance.

* + - The Periodic Review Report writer may want to consider meeting with the AVP prior to

writing up his/her report to get some guidance and to ask any questions the Periodic Review Report writer might have.

* + - Choose data to illustrate points made in the report; all data should be accompanied by

explanatory text, or analysis/reflection. Data that does not contribute to program

reflection does not need to be included in the report.

* + - The review process should be a meaningful one that contributes to program strengthening

and that offers the program the vehicle for collaborative reflection, planning, and creative thinking as well as broad-based conversation about programmatic issues with the Dean, the Provost, the Provost Office staff, and the external consultant. The Periodic Review Report writer should embark on the process in this spirit.

* + - The sections of the report that have received the most attention by the Periodic Review

Report writer, Deans, external consultants, and attendees at CTL meetings over the past two years are:

* + - * + assessment/student learning outcomes/ELOs/ ePortfolios
        + curriculum development/curriculum mapping
        + experiences such as capstone courses, internships, experiential learning/community engagement opportunities
        + precepting/mentorship of students, especially as relates to work/education after graduation
        + face-to-face, hybrid, online course delivery methods
        + program growth/viability/creative retooling
        + time to degree completion/dual-credit courses/prerequisites and multiple entry points to the major/cross-listing and cross-program/School collaborations
        + faculty teaching and expertise/scholarship.