~~Decennial~~ Octennial "Strategery": Identifying Potential Issues During the Developing Phase of the Self-Study Process.

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What is strategery?

The use of the term “strategery” is purposeful, as I’m implying both the humor of the *Saturday Night Live* skit and the often hurried nature of implementing strategy in a time-constrained environment. The approach being advanced is one I used while at Cedar Crest College when I served as their co-chair of their decennial self-study.

Purpose

1. A method for approaching MSCHE's Standards and the octennial report.

2. Understanding the timeline of the self-study process

3. Managing time, the process and trouble shooting institutional weaknesses (challenges).

4. Balancing the needs of Middle States and the institution.

5. Producing a self-study report that will live on after the Visiting Team leaves.

Timeline of the Self-Study Process

Timeline of the Self-Study Process (Usually Starts about 2 Years Before the Visit)

1. Preparation Phase: Thinking about how you want to group the standards and thinking about who you want to serve on which groups.

2. Self-Study Design: Creating the questions that will drive information gathering during the process (Handle this part with care)

3. 1st Draft of the Report: There is no editing for length during this phase.

4. 2nd Draft of the Report and the Public Phase

5. Final Report and the Team Visit

Timeline of the Self-Study Process: Preparation Phase

Preparation Phase: Thinking about how you want to group the standards and thinking about who you want to serve on which working groups.

- Each working group should have 2 co-chairs (Faculty and administrator?)
- Each working group should be sufficiently staffed, balancing knowledge, skills and, yes, personalities
- Consider creating a survey and having individuals select their top 3 or 4 choices, but make no promises.
- Keep a “backup” list of individuals that can fill in when someone leaves the institution.

Timeline of the Self-Study Process: Self-Study Design

Self-Study Design: Creating the questions that will drive information gathering during the process (Handle this part with care)

- Ask meaningful questions relevant to the standard and its fundamental elements.
- Have some conception (if you can) of the institution's strengths and weaknesses related to the standards.
- You want questions that will assist with addressing the standard without overexposing the institution to risk.

Note: There is a craft toward developing a self-study report that will serve the institution's best interest while also addressing the standards of excellence and being transparent.

Timeline of the Self-Study Process: The First Draft

1st Draft of the Report: There is no editing for length during this phase.

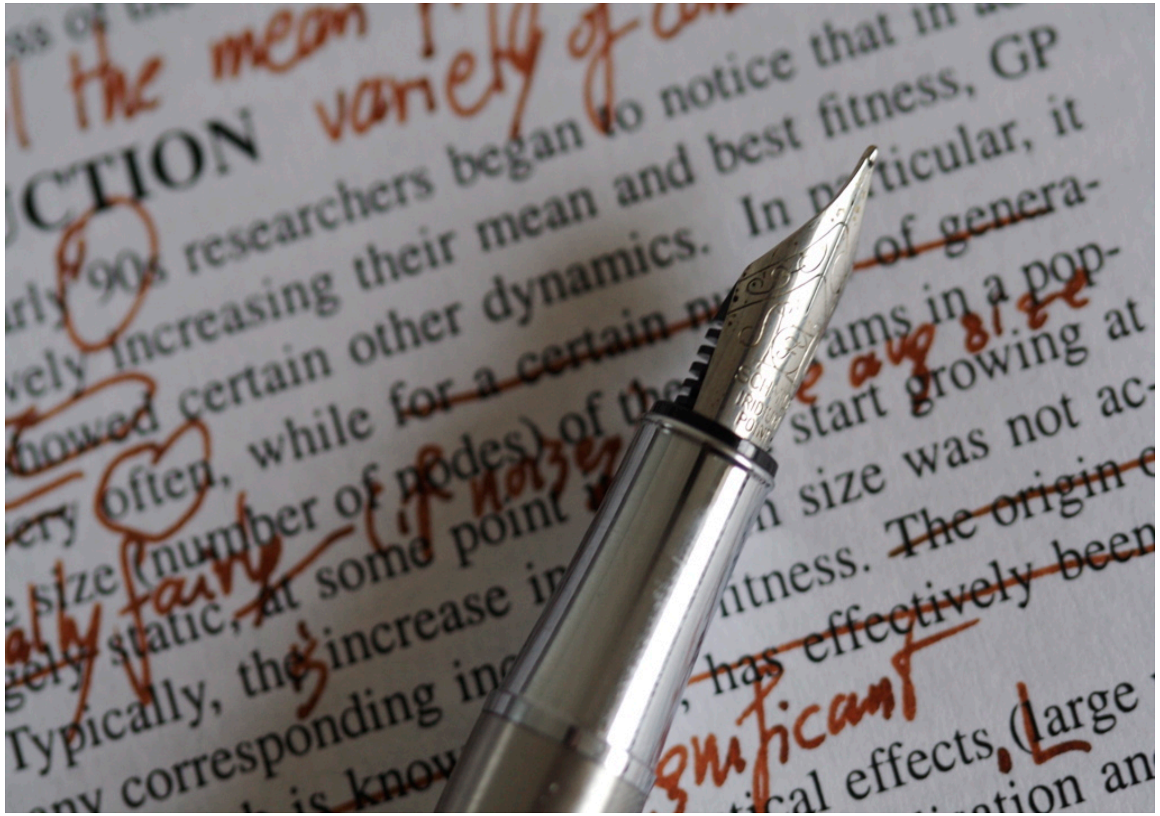
- First Phase of Writing: Answering the research question

- Second Phase of Writing: Turning the answers and the research questions into a written text

- Editing only for clarity not length

- Working group should read the entire chapter when all of the pieces have been put together

Note: It is preferable to have an external editor that also has a background in MSCHE.



Questions

Middle States Standards & Fundamental Elements Strategery

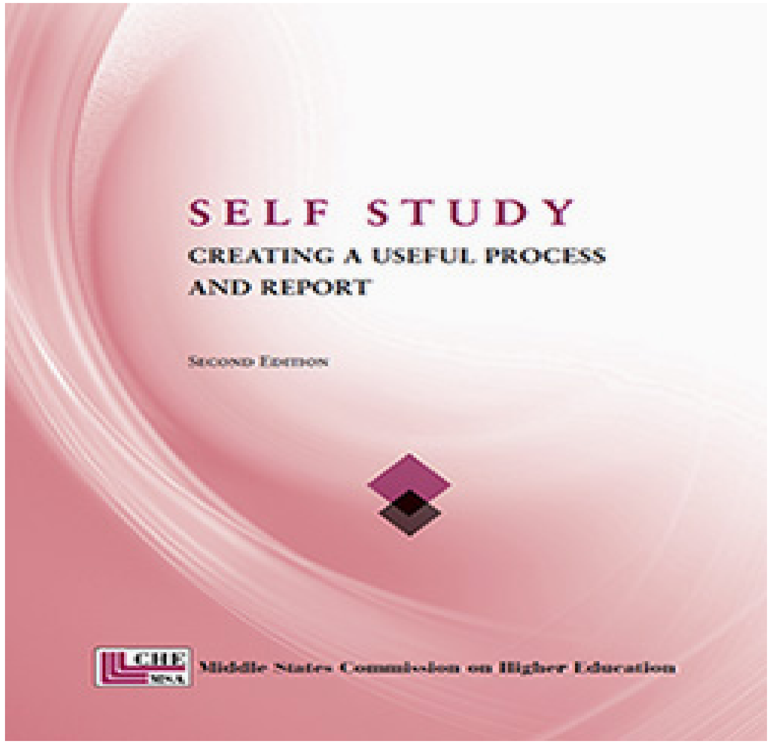
Rubrics were used for the Standards

• Used the fundamental elements as an organizational tool

•Able to get a sense of what evidence and the opinions of colleagues by standard.

• Used to help create the research design for the decennial self-study (if given during the writing of the first draft phase).

• Identified potential areas that needed addressing before the site visit



Middle States Standards & Fundamental Elements Rubric

Fundamental Elements of Student Learning (Standard 14)	Self-Evaluation Pre-Assessment Score
Characteristics of Excellence in Higher Education (MSCHE, 2009)	**4= Clear evidence that is verifiable 3= Some evidence 2= Evidence is lacking 1=No Evidence NA (Not all fundamental elements are applicable to Cedar Crest) Note: Please place your score & comments into the boxes identifying sources of information or other possible areas to investigate.**
• Clearly articulated statements of expected student learning outcomes at all levels (institution, degree/program, course) and for all programs that aim to foster student learning and development;	
• A documented, organized, and sustained assessment process to evaluate and improve student learning;	
• Assessment results that provide sufficient, convincing evidence that students are achieving key institutional and program learning outcomes;	
• Evidence that student learning assessment information is shared and discussed with appropriate constituents and is used to improve teaching and learning; and	
• Documented use of student learning assessment information as part of institutional assessment.	

Middle States Standards & Fundamental Elements Strategery

- Gather and verify the results (Indirect evidence, yes, but you need to make this actionable)
- Ask for documents to support viewpoints, specifically when someone strongly believes there’s evidence to support a fundamental element
- If there are fundamental elements that are not applicable (first, make sure they’re not), then ignore.

Middle States Standards & Fundamental Elements Strategery

Addressing Significant Gaps:

- Get to work immediately (Don’t wait for the Visiting Team)
- Do something (anything) that will *satisfice* the issue (if it can be done)
- Be strategic – By addressing short-comings you are “closing the loop” and affirming your accreditation

The Second Draft and the Public Phase

2nd Draft of the Report and the Public Phase

- Editing the document to the required length
- Gathering all supporting data and proper archiving is critical during the editing phase
- Keep and submit (when possible) original full length versions of the original chapter as an appendix

Questions

The Public Phase Strategery

Co-Chairs should present shortened preliminary findings to:

- President
- President’s Cabinet
- Board
- Faculty
- Administrators/Staff
- Students
- Alumni
- External Stakeholders (as needed)

These presentations are critical with developing the narrative for this report.

Note: Do address any ***data*** discrepancies, and consider other observations from these groups. Make changes (cautiously) as needed.

The Visiting Team Strategery

Visiting Team

- Ensure that there are no conflicts of interest (Make sure you haven’t, at one time, fired one of the members of the Visiting Team)
- Google search every member of the Visiting Team and build a profile on each one. (Specifically on the Chair and the person likely heading up Standards 7 & 14)
- Print their latest publications (if applicable)
- Print the abstract to their dissertation
- Print out their LinkedIn profile
- Print out their Academia.edu or similar type profile

Have the co-chairs of the relevant working groups know these profiles. Try to understand how the Visiting Team is likely to conceptualize the standards.

Preparing for Visiting Team Interviews

Mock Interviews

- Mandatory sessions on possible questions based on the standards, their fundamental elements and self-study report should be had with all major constituents.

- The mock interviews should include a range of questions including those that may be difficult to answer.
  (*Example: Questions about employee morale, declining enrollment, growing student loan default rates, deferred maintenance, any negative news scandal in the last 5 years*)

- It is important that they face these types of questions – even if they don't hear them from the V.T. – in order to be on message, not get flustered or say something that could negatively influence the Visiting Team.

During The Visit Strategery

- Make sure all Working Group chairs are prepared for their Visiting Team expert
- Make the Visiting Team comfortable
- Tell them that if there is any other piece of data that they need, they should ask. (You don’t want them thinking that something doesn’t exist)
- Always ask them at the end of the day (Is there anything else you need?)
- Project confidence

Questions

Post-Visit Strategery

- Create a tracking system to work on internal and external recommendations.
- Create a tracking system to do some follow-up on suggestions
- Assign ownership to each of the major recommendations and produce follow-up reports every 6 months (if applicable)
- Track any budgeting modifications that go into addressing a recommendation or suggestion.

Thank You