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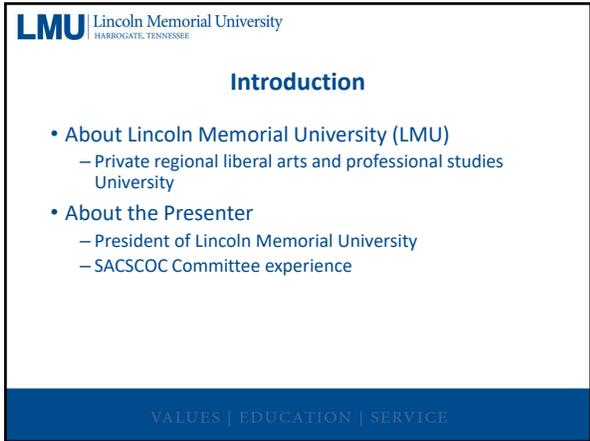
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## Planning Strategically



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## Planning Strategically- an Overview

- Timelines and processes for preparing documents for submission prior to visit.
- Review of the strengths and weaknesses of the report submitted to SACSCOC.
- Accommodations for the Visiting Team.

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## Planning Strategically: an Overview (cont.)

- Agendas for the On-Site Visit.
- Preparing institutional constituents to participate in the visit.
- Preparing any additional documentation for the On-Site Committee to review on arrival or during the visit.

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### Considerations in Developing the Timeline for Preparing Documents

- Determine processes for submitting and reviewing drafts for each standard.
- Determine who has the information to address each standard.
- Assign responsibility for developing electronic and paper drafts of reports.
- Allow time for reflection on completed drafts of narrative responses and all supporting documentation.
- Schedule a review for consistency of information presented throughout the documents/standards.



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### Review of Report Submitted by the Institution

- Provides opportunity to conduct internal/external analysis of strengths and weaknesses of the submitted report.
- Develop strategies to strengthen the case for compliance with selected standards.
- Develop any necessary additional documentation and determine most appropriate methods for introducing improvements made prior to the visit.
- Plan to communicate evidence of improvements to the committee prior to, or during the visit.



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### Accommodations: Hotel

- Hotel with conference/meeting room and restaurant near the institution.
- The institution typically makes reservations and communicates accommodations to the Committee on the *Information Outline for a Committee Visit Form*.
- Environment—consider Committee members' comfort and safety.
- Plan for technical support.



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**Accommodations:  
Meeting/Resource Room at the Hotel**

- Provide hotel meeting/resource room available for committee on 24-hour hold during the visit.
- Set up meeting/resource room based on the Committee Chair's directions.
- Include the following in the room: at least one copy of all reports and materials, computers for Visiting Committee Members, printer, internet access, shredder, copy machine, pens, pencils, highlighters, sticky notes, stapler, etc.



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**Accommodations:  
On-Site Meeting/Resource Room**

- The Committee needs a meeting/resource room on campus (or at the teaching site) to conduct its work.
- The on-campus meeting/resource room should include copies of all reports and documentation.
- The on-campus meeting/resource room should include the same technology and office supplies as the hotel meeting/resource room.



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**Accommodations:  
Meeting/Resource Rooms at the Hotel and On Campus**



When in doubt,  
ask the Chair.

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**Accommodations: Food**

- The institution usually makes arrangements to provide meals for the Committee.
- The meeting/resource room(s) should have snacks and beverages.
- Where meals are served depends on the specific lodging and institution. Work with Committee Chair.
- The institution should provide snacks at locations where all interviews are scheduled.



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**Accommodations: Transportation**

- The institution is responsible for getting Committee members to the hotel at the beginning of the visit.
- The institution is responsible for transportation from the hotel to the institution and back during the visit.
- The institution is usually responsible for transportation of Committee members to the airport at the conclusion of the visit.
- Talk to your Committee Chair!



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**Agendas for the Visit**

- Typical activities during the visit
  1. Campus/Building Tour
  2. Document Review
  3. Class/Office Visits (optional)
  4. Extended Site Visits
  5. Individual and Group Interviews
  6. Allow time for Committee members to write their report



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**Agendas: Scheduling Interviews**

- Depends on the interviewer’s direction and/or the number of interviewees.
  - For example,
    - Program Coordinators/Deans/Administrators: 1 to 1
    - Faculty: 1 to 1 or group
    - Current students in a class, individually, and/or in groups
- Interviews are usually scheduled for 30-60 minutes depending on the number of people being interviewed and the standard(s) involved.

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**Agendas: Common Meetings**

- Introduction of Campus Leadership/Overview of Institution. Include the President/CEO and members of the Leadership Team. Typically the first meeting on Campus.
- Meeting with a group of Trustees/Directors. Sometimes planned as a lunch meeting.
- Meeting with a group of Students. Sometimes planned as a lunch meeting.

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**Special Consideration for Lodging, Transportation, Meals, and Agenda Planning**

- Be **absolutely** sure to consider any special requests or needs of Committee members in planning.
- This can be achieved by means of a Committee Member survey prior to the visit.

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**Preparing Institutional Constituencies**

1. Board of Trustees/Directors
2. President
3. Provost/CAO
4. CFO
5. Deans
6. Faculty
7. Staff
8. Students

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**General Interview Tips**

- Be honest
- Do not volunteer information on matters about which you are not fully informed
- Exhibit respect/collegiality
- Avoid criticizing others
- Anticipate questions
- Display friendly demeanor



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**Preparing Institutional Constituencies:  
Strategies for Working with Small Groups**

- Explain the accreditation process.
- Review narrative and documentation related to standards serving as basis for interview.
- Review potential questions for standards in SACSCOC Resource Manual.
- Review developments related to compliance since submission of the most recent report (Focused Report/Documentation Template).

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**Preparing Institutional Constituencies:  
Strategies for Working with Large Groups**

- Faculty/Staff Conference Presentations
- Convocations
- Town Hall Meetings
- Presentations to Faculty during Academic School Meetings
- Presentation to Trustees
- Reaffirmation Website (QEP, Compliance Certification, Off-Site Committee Report, and Focus Report)

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**Preparing Institutional Constituencies:  
Strategies for Working with Large Groups  
(cont.)**

- Student/Faculty/Staff Email Campaigns
- QEP Logo Contest
- T-shirts
- Posters

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**Preparing All Institutional Constituencies:  
Things to Review/Know *before* the Team Comes**

- Report content and expectations embedded in the standards—do not address issues unrelated to the review.
- Anticipate what faculty, staff, administrators, and students will say.

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**An “Institutional Summary Form Prepared for Commission Reviews” is submitted for all types of Committee Visits.**

- Faculty, staff and administrators should be familiar with the content of the form.
- The form provides a list of educational programs and degrees offered, type of governance control, a brief history, institutional characteristics, a list of off-campus sites and distance learning modalities, accreditation status with other agencies, and the institution’s relationship with the U.S. Department of Education.

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**Mock Visit**

- Provides opportunity to utilize internal and/or external experts to prepare individuals/groups for interviews.
- Allows institutional constituents to become familiar with the interview format.
- Helps to identify key points for communicating compliance with standards.
- Helps individuals/groups plan strategies for presenting the most accurate and focused responses to potential questions.

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**Before the Visit**

- Prepare individual schedules for each Committee member.
- Arrange for each Committee member to be assisted by an institutional representative (excellent opportunity to involve students).
- Practice demonstrations/presentations.

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**During the Visit**

- Track schedule for each On-Site Committee member.
- Have staff available to contact institutional personnel when new interviews are requested.
- Determine method for delivering additional material requested for Committee review.

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**During the Visit (cont.)**

- Brief and debrief individuals/groups interviewed.
- Be flexible and adjust schedules as necessary.
- Be prepared to work late if necessary, to address issues that arise.
- Have institutional leadership, clerical, and technology staff accessible at all times.

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**Essential Resources**

- Resource Manual for The Principles of Accreditation
- Handbook for Institutions Seeking Reaffirmation
- Handbook for Review Committees

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**Questions  
or  
Comments?**

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**Contact Information**

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eugene.hess@LMU.net.edu  
Office: 423-869-6391

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