Visit Process Guide

Preparing For and Conducting

An External or Internal Review Committee Site Visit

Information for Units

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# Purpose:

This process guide should be used by units engaged in Decennial Program Review to prepare and conduct the external or internal review of their unit.

# Overview:

## External Review:

External reviewers play a pivotal role within the academic program review process at the University of Oregon. As experts in the field, they bring knowledge of the larger context of the discipline and peer programs. Additionally, being external to the institution allows reviewers to offer an unencumbered evaluation of the unit within the campus context. Each unit undergoing program review will select external reviewers that will comprise a three-member External Review Committee (ERC).

The ERC will be tasked with the following:

1. Review of the self-study
2. Site visit with the unit, constituents, and academic leadership
3. Development and submission of the ERC Report containing an assessment and set of recommendations for the unit

## Internal Review:

Most programs undergo an external review process where experts from outside institutions bring knowledge of the larger context of the discipline and peer programs. In some cases, the characteristics of a program make it better suited to undergo an internal review process. For example:

* few or no degrees awarded
* few or no faculty with primary home in the unit

Characteristics like these make an extensive external review process less necessary. The goal of the internal review committee (IRC) process is to bring third party expertise from programs/departments that are similarly structured to provide a candid assessment of a program’s performance with a focus on student learning and achievement, especially on closing equity gaps where they exist. The IRC process should assist the unit in selecting priority areas of focus that will drive continuous improvement for several years following program review. The IRC process will consist of the following elements:

1. Review of the program Self-Study Report
2. Interviews with dean, department chairs, faculty, staff and students
3. Development and submission of an IRC report containing an assessment and set of recommendations for the unit.

The Office of the Provost (OtP) assigns the type of review for each unit. A list of all review types by unit can be found in the [Decennial Program Review Schedule](https://provost.uoregon.edu/decennial-program-review-schedule) on the OtP website.

## Roles and Responsibilities:

* **Unit Leadership –** Units are responsible for most aspects of the ERC/IRC visit with guidance provided by the Office of the Provost (OtP) in this document.
* **Unit Liaison –** Units should select a liaison who will serve as the primary point of contact for ERC/IRC members before, during, and after the visit.
* **Unit Scheduling and Logistics Support –** Units will coordinate with the OtP on visit scheduling. Units should designate a support person to work with the OtP.
* **School/College Leadership** – Deans or associate deans must meet with the ERC/IRC members during their visit and are responsible for reviewing corrections of fact and finalizing the ERC/IRC report.
* **Office of the Provost (OtP)** - Provides and updates ERC/IRC visit guidance, the ERC/IRC report template, and provides funding for ERC/IRC visits.
* **Office of the Provost (OtP) Scheduling and Logistics Support –** The Executive Assistant to the Associate Vice Provost of Academic Affairs is the OtP primary point of contact for visit scheduling, introduction and exit meeting scheduling, and other questions about visit logistics.
* **Office of the Provost (OtP) Leadership –** The provost's office will meet with ERC/IRC members during their visit and will review the final ERC/IRC report.
* **External Review Committee (ERC)** - Three-member committee of reviewers from peer institutions who will visit and assess the unit's self-study report and information gathered during the visit. The ERC will submit an ERC report following their visit.
* **Internal Review Committee (IRC)** - Two-member committee of reviewers internal to the institutions who will assess the unit’s self-study report and information gathered during their meetings. The IRC will submit an IRC report following their meetings.

## Visit Budget:

The Office of the Provost (OtP) will provide units with a lump sum payment of $9,500 per *external* review site visit or $3,000 per *internal* review site visit. OtP will transfer funds to units the January prior to the visit. Units will budget as follows:

* $1,250 honorarium paid to ERC/IRC members upon completion of the ERC/IRC report.
* $1,150 lump sum for travel and meals for each ERC member paid upon completion of the ERC report.
* $600 direct deposit payment per ERC member to the Graduate Hotel for three nights.
* $500 for ERC or IRC dinner with unit leadership.

**Total Budget for 3 Person ERC Visit = $9,500**

**Total Budget for 2 Person IRC Visit = $3,000**

Units will provide lump sum payments to ERC/IRC members upon submission of the ERC report. If travel costs (minus hotel) total more than $1,150, units will work with individual ERC members to cover additional costs.

## Unit SharePoint Folders:

Every unit has a centrally managed Program Assessment SharePoint Folder. Instructions for accessing this folder are linked here – [Program Assessment Folder Access](https://provost.uoregon.edu/program-assessment-folder-access). You will submit the following items to the Decennial Program Review>YYYY-YYYY sub-folder as they are completed:

* Self-Study Report & Appendixes (\*)
* Faculty CVs (\*)
* ERC/IRC Visit Schedule (\*)
* Short ERC/IRC Member Biographies (\*)
* ERC/IRC Report
* Goal Setting and Implementation Plan

Follow the naming convention at the bottom of the [Program Assessment Folder Access](https://provost.uoregon.edu/program-assessment-folder-access) page when uploading reports.

Items notated with a (\*) will be sent to ERC/IRC members at least 30 days prior to their visit. You can email these items to committee members, or you can grant ERC/IRC members temporary access to your unit SharePoint folder and send them the link. Email uoprogramreview@uoregon.edu to request a link to share with ERC/IRC members.

# Part 1. Before the Visit

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| --- |
| Timeline:  |
| * Spring prior to the visit – ERC/IRC members are selected
* By September prior to the visit – Visit dates are confirmed
* At least 90 days before the ERC/IRC visit vendor contracts, which include a W-9 or W-8, will be created by the unit
* At least 75 days before the visit flights will be booked by ERC members
* At least 75 days before the visit hotel reservations will be made by the unit
* At least 61 days before the visit the initial scheduling template will be completed by the unit
* At least 31 days before the visit the schedule template will be reviewed by OtP
* At least 30 days before the visit materials will be provided to the ERC/IRC by the unit
* Prior to the visit units will schedule and conduct a pre-visit check-in with ERC/IRC members.
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## External Review Committee (ERC) Member Selection:

In consultation with the dean's office, units will select External Review Committee (ERC) members units in the spring prior to the visit.

Before selecting possible ERC members unit heads should consult with their faculty and consider the below criteria:

* ERC members should be nationally or internationally recognized in their academic field.
* ERC members should have experience to understand the operation of an R1 research university.
* ERC members should have a good sense of the full range of the discipline, especially where there are multiple subfields.
* ERC members should have a good understanding of current trends in graduate and undergraduate programs and curriculum.
* Geographic diversity, as well as gender and racial/ethnic diversity, should be considered when preparing the list of reviewers.

Committee composition:

* There will be three committee members total.
* One reviewer should have particular expertise and will focus on *research/scholarship* of the unit.
* One reviewer should have particular expertise and will focus on *student learning and success*, especially at the undergraduate level.

Units will work with the dean's office and use the [ERC Member Invitation Template](https://uoregon.sharepoint.com/%3Aw%3A/r/sites/ProgramReviewDepartmentFolders/Shared%20Documents/1.%20Administrative%20Documents/Decennial%20Program%20Review/Standardized%20Communications/Email%20Templates/ERC%20Member%20Invitation%20Template.docx?d=wc005a9ce917042d48f680aa02ba02f6e&csf=1&web=1&e=sfNGuh) letter to co-invite potential members on behalf of the Office of the Provost and School/College dean. Please revise and personalize the template appropriately.

Units will identify eight potential ERC members and invite three at a time until three reviewers total are confirmed (including one with research/scholarship focus, and one with student learning and success focus). Committee members should be confirmed by May 15, the spring before the visit.

## Internal Review Committee (IRC) Member Selection:

In consultation with the dean's office, units will select six potential internal reviewers from programs that are similarly structured (e.g. are small in size and have only affiliated faculty). These reviewers should be UO faculty from outside of the department/program area. Units should consult with the Office of the Provost as needed to identify potential IRC members.

Units must use the [IRC Member Invitation Template](https://uoregon.sharepoint.com/%3Aw%3A/r/sites/ProgramReviewDepartmentFolders/Shared%20Documents/1.%20Administrative%20Documents/Decennial%20Program%20Review/Standardized%20Communications/Email%20Templates/IRC%20Member%20Invitation%20Template.docx?d=wbfaeba4a2742444ba1fb89b16fc6e9a9&csf=1&web=1&e=McsfXX) letter to co-invite potential members on behalf of the Office of the Provost and School/College dean. Please revise the letter appropriately.

Units will invite two members at a time until two reviewers total have confirmed. Committee members should be confirmed by May 15, the spring before the visit.

## Visit Dates:

Units are responsible for coordinating with potential ERC/IRC members, and the Office of the Provost (OtP) to confirm ERC/IRC visit dates within the following parameters:

* All ERC/IRC site visits will be scheduled between January and June of year 2 of Decennial Program Review. For example, if your unit is part of the 2025-2026 cohort, ERC visits will take place between January and June of 2026.
* Visits are two days plus two days of travel.
* Visits should be scheduled for Tuesday and Wednesday with travel occurring on Monday and Thursday.
* Units must coordinate with Carolyn Vogt in the Office of the Provost (OtP) uoprogramreview@uoregon.edu to schedule visit dates. The OtP will be present at the ERC/IRC introduction and exit meetings and therefore must be included in the scheduling process. NOTE: OtP representatives must attend *all* of the university visits and therefore must coordinate visit dates accordingly.
* Visit dates should be confirmed as far in advance as possible, but no later than September 1 the year prior to the visit. Schools on semester schedules leave for summer breaks in mid-May. Scheduling dates before ERC members leave for summer break is highly recommended.

## Visit Schedule:

Units are responsible for creating a detailed visit schedule. Please use the (2024-2025 [ERC\_IRC Scheduling Template](https://provost.uoregon.edu/sites/default/files/2024-06/2024-2025-erc_irc_visit-schedule-template.xlsx)) to create an initial schedule. Units will complete an initial draft of this scheduling template at least 61 days prior to the visit. You will review your schedule with ERC/IRC members prior to their visit and adjust as needed.

External/Internal Review Committee visits are scheduled for two full days, on Tuesdays and Wednesdays.

Leadership Meetings:

External/Internal Review Committee members must meet with university and unit leadership at the start and end of their visit. There are four required leadership meetings included in the template. These meetings are highlighted in green and say (NON-FLEXIBLE MEETING). While these meetings must take place at the start and end of the visit, units may work with the Office of the Provost and school/college leadership to adjust the times of these meetings as needed.

Units MUST work with OtP to schedule the kick-off and exit meeting with the provost's office.

Constituent Meetings:

Units must schedule one to two meetings per key constituent group (faculty, students, staff) and ensure all faculty and staff can attend at least one meeting. Faculty and staff meetings should not include department, school or college leadership. Potential time slots for these meetings are highlighted in yellow in the template.

Units should schedule additional constituent meetings to meet the unique characteristics of their unit. For example, if your unit has significant career faculty, consider scheduling a dedicated career faculty meeting. Units with graduate programs should schedule a meeting specifically with graduate students. Below is a list of potential meeting types:

* Faculty - Assistant Professors
* Faculty - All Other Tenure Track Faculty
* Faculty - Career Faculty
* Undergraduate Student
* Graduate Student
* Staff

Units may also consider classroom observations, facility tours, or other types of meetings relevant to the unit and ERC/IRC members.

Completing the Template:

Units should download the template XLS (2024-2025 [ERC\_IRC Scheduling Template](https://provost.uoregon.edu/sites/default/files/2024-06/2024-2025-erc_irc_visit-schedule-template.xlsx)) and complete the schedule as follows:

Step 1: Complete the Visit Information Tab yellow highlighted sections

Step 2: Complete Day One and Day Two schedule tabs:

* Column A – Time: Start and end time of the meeting
* Column B – Meeting Type: Possible meeting types are included in the template. Choose one from the list or add a different meeting type and erase the other options.
* Column C – Location: Where the meeting will be held.
* Column D – Zoom Link: Provide a zoom link if a remote option will be available for meeting participants.
* Column E – Name and Title of Meeting Participants: For leadership meeting list individuals who will attend. For constituent meetings provide a brief description of attendees
* Column F – Topics: Describe the topic(s) that will be discussed at each meeting. This column has been pre-filled for leadership meetings.

Units can adjust the break time between meetings, but please provide enough time for ERC/IRC members to travel between meetings, use the restroom etc.

Step 3: The draft schedule template must be completed no later than 61 days before the ERC/IRC visit and submitted to your units SharePoint folder for OtP review (see [Unit SharePoint Folders](https://uoregon.sharepoint.com/%3Aw%3A/r/sites/ProgramReviewDepartmentFolders/Shared%20Documents/1.%20Administrative%20Documents/Decennial%20Program%20Review/Decennial%20Program%20Review%20Guidance%20Documents/Working%20Documents/2025-2026/Working%20Doc%20-%20ERC%20Visit%20Guidance%20for%20Units.docx?d=w25426e69a1714197bff6b03f2e3d4e92&csf=1&web=1&e=DZhPg5&nav=eyJoIjoiNDQwNzQ3MzM0In0) section of this guidance doc). The OtP will review and approve visit schedules no less than 31 prior to the visit.

 Step 4: The schedule should be reviewed with ERC/IRC members in the [pre-visit check-in](https://uoregon.sharepoint.com/%3Aw%3A/r/sites/ProgramReviewDepartmentFolders/Shared%20Documents/1.%20Administrative%20Documents/Decennial%20Program%20Review/Decennial%20Program%20Review%20Guidance%20Documents/Working%20Documents/2025-2026/Working%20Doc%20-%20ERC%20Visit%20Guidance%20for%20Units.docx?d=w25426e69a1714197bff6b03f2e3d4e92&csf=1&web=1&e=P2HcWb&nav=eyJoIjoiNzkxNzg2Mzk0In0%3D). Adjustments should be made to accommodate ERC/IRC requests if possible.

## Required Forms and Contracts:

Units must ensure that three forms are completed at least 90 days before the visit. Note that vendor contracts must be completed prior to ERC members booking flights.

* [Conflict of Interest Questionnaire.docx](https://uoregon.sharepoint.com/%3Ab%3A/s/ProgramReviewDepartmentFolders/Ebv2yK6PSWpPqALpuxt78Q4BcQb4du-UCtbDJo2hlJAKIQ?e=RHLedO) must be completed and executed by each ERC member. Units should review these to ensure the ERC member can be an impartial reviewer. IRC members do not need to complete this step.
* W-9 or W-8 for international individuals must be completed for all ERC members to complete vendor contracts. You do not need to collect W-9 or W-8 for IRC members. W-9 and W-8 are confidential documents and should not be shared.
* Vendor contracts:
	+ Vendor contracts are required for ERC members only. IRC members do not require a vendor contract because they are university employees.
	+ Vendor contracts must be in place at least 90 days prior to the ERC visit and should include:
		- $1250 honorarium (Fixed Fee)
		- $1150 lump sum for travel expenses (Reimburse Expense)
		- $600 direct bill for hotel (Direct Payment Expense – Note: ERC members will not receive this money, but it is still included in the vendor contract)
	+ Follow the [sample contract](https://uoregon.sharepoint.com/%3Ab%3A/s/ProgramReviewDepartmentFolders/Eez-4e4yqDlCpls5rtEzzy4BXbo2KfE8jBE0Q7l5P-tVlA) linked here for all ERC members
	+ Vendor contracts must be submitted through the Purchasing and Contracting Services (PCS) > Purchasing Portal Tab. If you are not familiar with the process, contact Carolyn Vogt carolynv@uoregon.edu for support.
	+ Processing could take up to four weeks, please plan accordingly.
	+ ERC members should be reminded that they are responsible for booking flights and transportation once the vendor contract is in place.
	+ ERC members will be reimbursed after the visit. Reimbursement could take up to ten weeks.

## Travel Logistics:

Units are responsible for overseeing travel arrangements using the following guidance:

* **Hotel**: Graduate Hotels has a discounted rate for University of Oregon and allows for direct billing. Please try to book at the Graduate Hotel first and seek other options if there is no availability.
* **Flight:** External reviewers should book their own flights. Arrival should be the day before the visit. Departure should be the day after the visit.
* **Transportation:** Transport can be scheduled by ERC members or units. Specific instructions for where and when ERC members should be dropped each morning on campus should be provided to ERC members in advance. The unit liaison should meet ERC members each morning at the drop off location and walk them to their first meeting. Transportation costs are covered by the ERC members’ $1,150 lump sum payment, units do not need to pay for transportation.
* **General Meals:** ERC members’ $1,150 lump sum includes per diem meal reimbursement. Units should provide restaurant recommendations for lunch and dinner as well as coffee/tea, snacks, and water as needed to ensure ERC members feel welcome and supported during their visit. Please work with ERC members to ensure dietary needs are met.
* **Welcome Dinner:** Units should arrange one dinner out with ERC/IRC members and unit leadership. OtP provides $500 to support this meal. Unit leaders may need to cover this meal up front and be reimbursed by the unit. We recommend planning this meal as a welcome and introduction session. Please ensure the meal includes options to meet ERC dietary needs.

Note: Units will reimburse ERC members with a lump sum of $1,150 for flight, transportation, and meals (no receipts required). IRC members do not receive travel or meal reimbursement.

## Materials Provided to ERC/IRC Members:

Units will send ERC/IRC members the following information 30 days prior to the visit:

* Initial visit schedule
* List of ERC/IRC members names, emails, and short biographies
* A copy of the unit Self-Study Report and appendices
* Faculty CVs
* The External or Internal Review Committee Visit and Report Guidance
	+ [External Review Committee (ERC) Visit and Report Guidance](https://provost.uoregon.edu/external-review-committee-erc-visit-and-report-guidance-2025-2026)*for reviewers*2025-2026
	+ [Internal Review Committee (IRC) Visit and Report Guidance](https://provost.uoregon.edu/internal-review-committee-irc-visit-and-report-guidance-2025-2026) *for reviewers*2025-2026

## Pre-Visit Check-In with ERC/IRC Members:

The unit should schedule a pre-visit check in with ERC/IRC meeting to discuss the following:

* Review the visit schedule and make changes as requested
* Discuss additional materials ERC/IRC members would like provided during the visit
* Discuss and confirm the welcome dinner and other logistics as needed

## General Communications About the Visit:

Units are responsible for communicating with ERC/IRC members about the visit. Ensure that your ERC/IRC members feel aware and supported during the visit planning process.

# Part 2. During the Visit

During the visit, units should provide a welcoming and supportive experience for ERC/IRC members. The use the following tips as guidance for the visit:

* Ensure ERC/IRC members always have access to the unit liaison.
* Plan and invite ERC/IRC members to dinner with leadership (include directions).
* Designate a morning drop-off time and location to meet and greet ERC members.
* Provide a person to lead ERC members to different meeting locations.
* Provide recommendations for local food options for lunch and dinner (outside of the unit scheduled dinner).
* Ensure the ERC/IRC “home-base” room is welcoming and has refreshments and snacks.
* Ensure dietary needs are considered and met.
* Be prepared to make last-minute schedule changes or provide documents as needed/requested.

# Part 3. After the Visit

## External/Internal Review Committee Report:

External/Internal Review Committee Reports should be completed and submitted to units and uoprogramreview@uoregon.edu within four weeks of the visit. For unit is the College or Arts and Science (CAS) reports should also be submitted to casprogramreview@uoregon.edu. Units are responsible for following up with ERC/IRC reviewers as needed to facilitate the submission of the report. Units should ensure that the report is submitted in a word.doc format to allow for corrections of fact track changes. Once the ERC/IRC report is submitted units may process payment to committee members.

The unit has two weeks to provide corrections of fact revisions to the ERC/IRC report. Corrections of fact should be *factual corrections only* and should be made using track changes. Disputes around the opinions or conclusions made by the ERC/IRC are not allowable corrections.

The word doc version of the ERC/IRC with track change corrections of fact must be uploaded to the unit SharePoint folder within two weeks of the visit. **Units must email** **Uoprogramreview@uoregon.edu** **to inform the Office of the Provost that the report has been uploaded.**

## Office of the Provost Review:

The Office of the Provost will review the ERC/IRC report with corrections of fact and either accept or reject track changes made by the unit. The OtP will create a final PDF version of the report and inform unit and/or the CAS deans office that the report is final.

Upon completion of the ERC/IRC report, the Office of the Provost will schedule a time with the unit dean or associate dean and the OtP to review the findings and discuss next steps to complete the goal setting and implementation plan. OtP participants should include the Associate Vice Provost of Academic Affairs, and the Assistant Vice Provost of Data and Decision Support.

School/college leadership can choose how and when to share the ERC/IRC findings with unit constituents.

## Expenses, Fees and Billing Procedures:

Units will pay ERC/IRC members upon receipt of the report through the normal accounts payable (A/P) banner system in accordance with the vendor contract that was executed prior to the visit.

Units should request that the hotel send the hotel invoice upon ERC member check-out. Please pay hotel vendors as soon as the invoice is received.