

Visit Process Guide

Preparing For and Conducting
An External or Internal Review Committee Site Visit

Information for Units

Purpose:..... 3

Overview: 3

 External Review: 3

 Internal Review:..... 3

 Roles and Responsibilities:..... 4

 Visit Budget:..... 4

 Unit SharePoint Folders: 5

 Timeline: 5

 External Review Committee (ERC) Member Selection: 6

 Visit Dates: 6

 Required Forms and Contracts:..... 8

 Travel Logistics:..... 9

 Materials Provided to ERC/IRC Members:..... 9

 Pre-Visit Check-In with ERC/IRC Members: 10

 General Communications About the Visit: 10

Part 2. During the Visit..... 10

Part 3. After the Visit..... 10

 External/Internal Review Committee Report:..... 10

 Office of the Provost Review: 11

 Expenses, Fees and Billing Procedures:..... 11

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, in consultation with academic unit leadership. A list of all review types by unit can be found in the [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 and some logistical support provided by the Office of the Provost (OtP) and outlined 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 ERC/IRC members, unit leaders, and the OtP on scheduling meetings and other activities during the visit.
- **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)** - Updates ERC/IRC visit guidance for units (this document), the ERC/IRC visit and report guidance for reviewers, and funds the ERC/IRC visits.
- **Office of the Provost Scheduling and Logistics Support** – An OtP designee will be the primary point of contact for coordinating with units on determining dates of the visit, introduction and exit meeting scheduling, and other questions about visit logistics. OtP will complete all vendor contracts, book hotels, and may payments to ERC/IRC members.
- **Office of the Provost Leadership** – OtP leadership 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 based on the 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 institution who will assess the unit based on the 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) provides \$9,500 per *external* review site visit or \$3,000 per *internal* review site visit. OtP will make payments 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 (units will submit receipts to OtP for reimbursement).

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

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

OtP 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, OtP 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](#). 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 Corrections of Fact
- ERC/IRC Report Final
- Goal Setting and Implementation Plan

Follow the naming convention at the bottom of the [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 by the OtP.

Part 1. Before the Visit

Timeline:

- Spring prior to the visit – ERC/IRC members are confirmed by OtP (by May 15)
- Spring/summer prior to the visit – Visit dates are confirmed by OtP (by Sept. 1)
- At least 90 days before the ERC/IRC visit vendor contracts, which include a W-9 or W-8, will be created by the OtP
- 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 OtP
- 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 OtP
- Prior to the visit units will schedule a pre-visit check-in with ERC/IRC members.

External Review Committee (ERC) Member Selection:

The Office of the Provost (OtP) will invite and confirm ERC/IRC members using the member selection form completed by units the spring before the visit. Three ERC or two IRC members should be confirmed by May 15, the spring before the visit.

Visit Dates:

The Office of the Provost will schedule ERC/IRC visit dates using 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 will be scheduled for Tuesday and Wednesday with travel occurring on Monday and Thursday.
- The OtP will coordinate with units to schedule visit dates. The OtP will attend the ERC/IRC introduction and exit meetings. OtP representatives must attend *all* the university visits and therefore visit dates cannot overlap.
- Visit dates should be confirmed as far in advance as possible, but no later than September 1 the calendar year prior to the visit.

Visit Schedule:

Units are responsible for creating a detailed visit schedule. Please use the [2024_2025_ERC_IRC_Schedule_Template](#) to create an initial schedule. A copy of this template is located in your unit SharePoint folder, or you can complete the linked version and upload it to your SharePoint folder. Units will submit a draft schedule at least 61 days in advance of the visit to the OtP for review. Unit will then review the 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. This should be discussed in the pre-visit meeting with the ERC/IRC members.

Completing the Template:

Units will find the [2024-2025 ERC_IRC Visit Schedule Template](#) in their unit SharePoint folder. A downloadable version is on the website and linked here. Please ensure the populated template is uploaded to the SharePoint folder 61 days before the visit. 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 the units SharePoint folder for OtP review (see [Unit SharePoint Folders](#) 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. Adjustments should be made to accommodate ERC/IRC requests if possible.

Required Forms and Contracts:

OtP will ensure that three forms are completed at least 90 days before the visit. The required forms are for ERC members only, IRC visits do not require these forms. Note that vendor contracts must be completed prior to ERC members booking flights.

- [Conflict of Interest Questionnaire.docx](#) must be completed and executed by each ERC member. Units should review these to ensure the ERC member can be an impartial reviewer.
- 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)
 - Processing could take up to four weeks.

- 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:

The OtP and units will collaborate to complete travel arrangements using the following guidance:

- **Hotel:** OtP will book hotels rooms for reviewers. 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 to and from campus:** 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.
- **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 will reimburse units up to \$500 for dinner upon submission of receipts. Per University policy reimbursement will not include purchase of alcohol. Please ensure the meal includes options to meet ERC dietary needs.

Note: OtP 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:

OtP will send ERC/IRC members the following information via the unit SharePoint folder 30 days prior to the visit:

- Initial Visit schedule (completed by unit and reviewed by OtP)
- List of ERC/IRC members names, emails, and short biographies (completed by unit)
- A copy of the unit Self-Study Report and appendices (completed by unit)
- A copy of the External Review Committee Guidance for the Visit and ERC or IRC Report:

- [ERC Visit and Report Guidance for Reviewers](#)
- [IRC Visit and Report Guidance for Reviewers](#)

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 before or during the visit
- Discuss and confirm the welcome dinner and other logistics as needed

General Communications About the Visit:

OtP will communicate with ERC/IRC about visit dates, contract completion, hotel arrangements, and reimbursements. OtP will provide reviewers access to the unit SharePoint folder 30 days prior to the visit. Units are responsible for communicating with ERC/IRC members about meeting scheduling, the pre-visit check-in, and completion of the ERC/IRC report. Units must 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. 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 the Office of the Provost within four weeks of the visit. 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 OtP will process payment to the ERC/IRC 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 document version of the ERC/IRC report with track changes must be uploaded to the unit SharePoint folder. Units must email Uoprogramreview@uoregon.edu to inform the Office of the Provost that the report has been uploaded.

School/college deans or associate deans will have two weeks to review and accept or deny corrections of fact made by the unit and finalize the report. One finalized a PDF version of the ERC/IRC report must be uploaded to the unit SharePoint folder. The school/college dean must email Uoprogramreview@uoregon.edu to inform the Office of the Provost that the report has been uploaded.

The final ERC/IRC report should be shared broadly with the unit. School/college leadership can choose how and when to share the ERC/IRC report with unit constituents.

Office of the Provost Review:

Upon completion of the ERC/IRC report the dean's office must 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.

Expenses, Fees and Billing Procedures:

OtP 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.

OtP will request that the hotel send the hotel invoice upon ERC member check-out.