

# LESSONS LEARNED FROM CONDUCTING AN INSTITUTIONAL SELF-STUDY

Panel Discussion

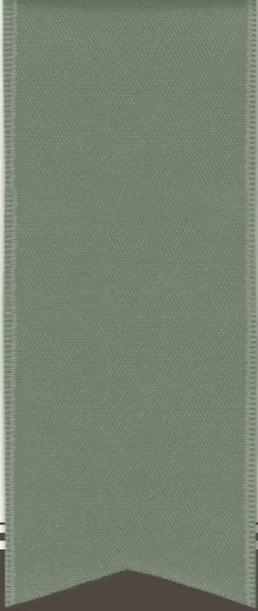


# Lessons Learned From Conducting an Institutional Self-Study

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Every strong institution has a plan for conducting an effective self-study as part of its quality assurance process.

- Developing Your Plan: *Getting Organized*
- Engaging Stakeholders: *Encouraging Campus-Wide Buy-In*
- Documentation: *Practical Plans for Data Gathering*
- Writing the Report: *Powerful Advice from Experienced Writers*



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# GETTING ORGANIZED—DEVELOPING YOUR PLAN

How to begin...

*when you don't know where to begin...*

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# THE PLAN...

Developing a plan for self-assessment is daunting for any institution.

In some cases, the beginning of the self-study culminates with the implementation of a completely new administrative structure.

# Look at ABHE Guidelines

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Familiarize yourself with

- ABHE requirements
- Most recently updated material
- Each ABHE Standard
  - 11 standards
  - 155 essential elements

ABHE offers all the documents required for a self-study in one location on their website:

<https://www.abhe.org/accreditation/accreditation-documents/>

# Begin Steering Committee Meetings

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- Select a chairperson or co-chairs - the president of the institution is an invested supporter throughout the process
- Decide on the best team members for each of the sub-committees
  1. *Assessment Committee*
  2. *Planning Committee*
  3. *Principal Writer/Editor*
  4. *Document Finishers*
  5. *Support Personnel*
- Set regular intervals for reporting back to steering committee
- Develop agendas and take detailed meeting minutes

# Committee Meetings...

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- *Steering Committee*  
*Leadership – compliance document, assessment plan, planning document*
- *Assessment Committee*  
*Analysis of assessment data, evaluates changes*
- *Planning Committee*  
*Action plans, especially where weak fulfillment of mission, goals, and objectives, budget impact, timelines*

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- *Principal Writer/Editor*  
*One consistent voice*
  - *Document Finishers*  
*Format, flow*
  - *Support Personnel*  
*Logistics, hospitality, meetings, overall coordination*

# Look at Self-Studies Done by Other Institutions

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- You will not find an organization exactly like yours, but you can get an idea as to a framework from which to work.
- You can glean good information on time management and distribution of workload.
- You can look at formatting and aesthetics of the self-study documents.

# Remember...

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- Talk to your ABHE Evaluation Team Chair

# INSIGHTS ON TOTAL CAMPUS ENGAGEMENT

*Remember, teamwork begins by building trust. And the only way to do that is to overcome our need for invulnerability.*

*Patrick Lencioni*

*None of us is as smart as all of us.*

*Ken Blanchard*



## Clarify Primary Goals to all Stakeholders

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- Ensure that all stakeholders understand the importance of the self-study
- Emphasize how all documentation needs to relate to the mission of the institution
- Define buzzwords to those who may not be familiar with the language of accreditation

# Clarify Primary Goals to all Stakeholders

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- Transparency is paramount in the development of the self-study.
- Explain that the primary purpose of the self-study report is to advance institutional self-understanding and self-improvement.
- The self-study is most useful when it is analytical and forward-looking rather than descriptive or defensive.
- The self-study is used to identify problems and develop solutions.

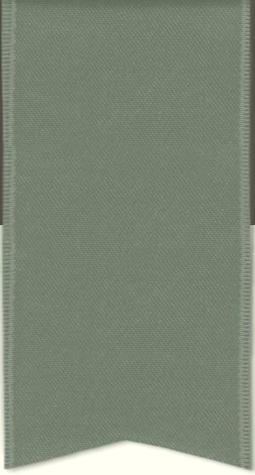
# Examine the Make-up of your Committees

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- A broad cross-section of the campus community is expected to participate in each component of the process - faculty, staff, administration, students, BOD, etc.
- Choose committee members - areas of expertise.
- Under the leadership of a steering committee, subcommittees examine existing data and evaluations, gather new information, and prepare reports on their assigned topics.

## Meet Frequently to Ensure that Everyone is “In the Loop”

- Decide when the steering committee will meet alone, and when subcommittees will meet with the steering committee.
- Do not leave one meeting without scheduling the next one.
- Establish firm deadlines for reporting of sub-committee findings.
- Schedule in buffers.



# PRACTICAL PLANS FOR COLLECTING IMPORTANT DATA

*If you can't describe what you are doing as a process,  
you don't know what you are doing.*

*Dr. W. Edwards Deming*

# Qualitative & Quantitative Data

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**Qualitative data** is a data concerned with descriptions, which can be observed but cannot be computed.

**Quantitative data** focuses on numbers and mathematical calculations and can be calculated and computed.

Both are valuable in your self-study

# Various Data Collection Tools

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- Surveys
- Interviews
- Focus Groups
- Assessments
- Case Studies
- Documents, Records, Reports

# Create a Repository for Your Data

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Instruct each committee to send their data to a specific repository.

The repository needs to be useable by all participants.

## Examples:

- Populi File Storage
- Google Docs
- Moodle
- Adobe Document Cloud

*Keeping digital copies of all documents is crucial, as is digitizing hard copies.*

# Assessment Cycle

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Make a copy of your assessment cycle in graphic form, and be prepared to describe both institutional and academic assessment procedures for your school.

# Assessment Cycle

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# Advice on Writing the Report

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*Say all you have to say in the **fewest possible words**, or your readers will be sure to skip them; and in the **plainest possible words** or they will certainly misunderstand them.*

*John Ruskin*



# Writing the Self-Study Document

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- Use the self-study table of contents provided by ABHE. It is invaluable in ensuring that you have included all information the accreditors require.
- The entire self-study report should be written with consistency in style, format, and structure. *The report should read as if was written by one individual.*
- The self-study report should be concise and coherent.

QUALITY IS MUCH MORE IMPORTANT THAN QUANTITY.

# Hints for the Writing of the Self-Study Document

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- Edit the report for correct grammar and transition of thoughts; transitions should be smoothly articulated.
- If there are certain design elements needed for the report such as graphics and tables, make sure they are consistent.
- Subcommittees need to know the format for their reporting early in the process.

## Final Draft

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After completion of the final draft, do not skip the work of the document finishers.

The more eyes you have on the document, the less likely you will be to overlook mistakes and typos.

The entire steering committee needs to read the final report.

## USE THE SELF-STUDY AS A LIVING DOCUMENT

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The written self-study report is a living document.

After completing the self-study, *working groups should continue to keep evidence of documentation* for the growth and development of the institution.

***Discourage the idea that ...***

***“WHEW, we are good for ten years...”***

## A Summary of Lessons Learned

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*Education standards, industry and professional accreditation exams and requirements are here to stay...*

CONNECT FINANCIAL SERVICE BROKERS CEO, PAUL TYNAN

### **Proverbs 1:5**

*Let the wise hear and increase in learning, and the one who understands obtain guidance...*

### **Proverbs 18:15**

*An intelligent heart acquires knowledge, and the ear of the wise seeks knowledge.*

# Lessons Learned

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- The first step is to identify the destination – ongoing improvement
- Identify the players
- Investigate similar institutions & best practices
- Read the ABHE documents multiple times – assign sections – use a highlighter – the ABHE documents are your best guide
- Lay a solid foundation for moving forward – you can't change the past
- Solid assessment data is crucial for moving forward
- Be transparent
- Committed stakeholders set standards for those less committed Asking hard questions and truthful answers are a huge part of a greater level of shared governance

# Lessons Learned...

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- Be flexible during the evaluation visit
- We should maintain the existence of the steering committee and train new individuals to be on various sub-committees OR put a person or committee in charge of monitoring compliance. Develop a schedule.
- We should continue to create time-lines with assignments relative to accomplishing the recommendations from ABHE.
- We learned we should immediately incorporate the self-study recommendations into existing college documents.
- To secure the expertise of outside consultants to assist with improvement strategies.
- To be collaborative: our own people are our most valuable resources.

# Resources

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ABHE Website

<https://www.abhe.org/accreditation/accreditation-documents/>

ABHE Commission on Accreditation Manual

<https://www.abhe.org/wp-content/uploads/2018/08/2018-AUG-COA-Manual.pdf>

ABHE Self-Study Guide

<https://www.abhe.org/wp-content/uploads/2018/09/2018-Self-Study-Guide.pdf>

Ashoeman. "Lessons Learned." First published in November 3, 2011. <https://www.dmu.edu/wp-content/uploads/Lessons-Learned.pdf>.

Bobby Mercer  
VP Administrative Affairs  
Tri-State Bible College, South Point, OH  
Cell – 304-710-9109