MSCHE
MIDDLE STATES COMMISSION ON HIGHER EDUCATION

SSI 2.0: Writing the Report & Preparing for the Visit

Dr. Idna Corbett, Vice President of Institutional Field Relations
Dr. Paul Starkey, Vice President of Institutional Field Relations

Fall 2021

1

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2

PRESENTERS

Dr. Paul Starkey
Vice President
Institutional Field Relations

Dr. Idna M. Corbett
Vice President
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3

3

CO-FACILITATORS

Ms. Zoe Irvin, Executive Director of Planning, Research, and Organizational Development, Howard Community College

Dr. Richard Linn
Senior Vice President
Trocaire College

Dr. Alberto López Mercado
Associate Vice President for Institutional Compliance
EDP University of Puerto Rico

4

4

Workshop Learning Objectives

- Identify strategies for transitioning from research to writing the Self-Study Report
- Learn the expectations for converting multiple group reports into a single cohesive document.
- Identify keys to success in planning and managing an effective Self-Study Evaluation Visit.
- Ascertain the expectations for the institutional response especially if the team issues recommendations or finds non-compliance.
- Identify strategies for successfully uploading materials before and after the visit.

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5

Phases of Preparing the Report

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6

Some Key Questions

- What are effective approaches to editing work group reports into an effective Self-Study Report and having that report reviewed by the campus community?
- What more can be done now to ensure that the visit is an effective part of the evaluation process and a positive experience for all involved?
- What happens after the team leaves?
- What is the best way to approach the institutional response?

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7

Overview of Phases in Preparing the Report

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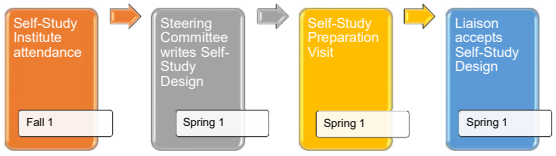
8

Phase One: Planning and Preparing



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9

Phase Two: Doing the Research

Working Groups do research
- Fall 2

Working Groups complete reports
- Spring 2

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10

Phase Three: Writing the Report

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11

Phase 4: Refining the Report

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12

Writing and Revising the Report

13

13

Converting Multiple Group Reports into a Single Cohesive Document

14

14

Working Group Reports Should Be:

- consistent in style, format and structure
- written in one voice
- accurate as of date of submission
- rewritten as needed

15

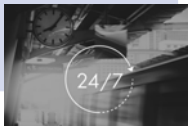
15

Edit the Draft for:

accuracy

consistency

continuity



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16

From Group Reports to the SSR

17

Ms. Zoe A. Irvin

Howard Community College

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18

Tips for Revising/Editing

- Refer back to the Self-Study Design
- Eliminate jargon and trite phrases
- Eliminate redundancies
- Seek the opinions of diverse campus community members
- Carefully analyze seemingly contradictory data
- Read from the perspective of an outsider
- Avoid the passive voice

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19

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20

Tip - Editorial Liaison per work team?

- Check that the first (or second) draft is presented as the Editor has requested before submitting.
  - Font-style and size, margins, headings, citation style, all initials spelled out, person references

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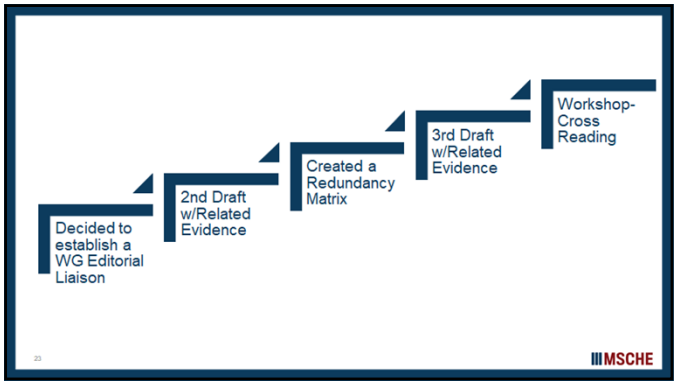
21


Decided to establish a WG Editorial Liaison
2nd Draft w/Related Evidence
Created a Redundancy Matrix
3rd Draft w/Related Evidence
Workshop-Cross Reading
23
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22


It always helps to read the document aloud!
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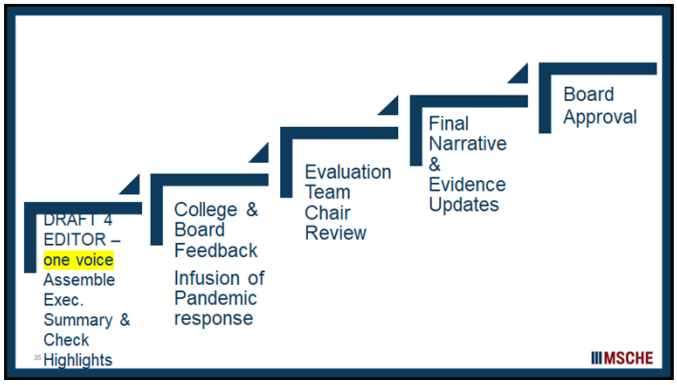
23


DRAFT 4 EDITOR – one voice
Assemble Exec. Summary & Check Highlights
College & Board Feedback
Infusion of Pandemic response
Evaluation Team Chair Review
Final Narrative & Evidence Updates
Board Approval
26
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24

Questions to Ask When Revising

1. Does the report
   - address the articulated priorities and outcomes for the self-study?
   - honestly represent the institution?
   - avoid individual agendas?
   - provide ample evidence for the assertions made?
   - provide ample evidence to show compliance with MSCHE Standards and Requirements of Affiliation?
   - provide ample evidence to show compliance with MSCHE policies, procedures and guidelines and applicable federal regulatory requirements?

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25

More Questions to Ask When Revising

2. Do you need more evidence to support your points? Is your evidence convincing?
3. Does the report conform to the outlines proposed in the SSD?
4. Are the future plans for the institution cited in the self-study realistic?
5. Does the report read as a unified document?
6. Does the report identify opportunities for improvement and innovation?
7. Do you anticipate the questions of the on-site evaluation team?

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26

More directly …

Does the report "tell" or "prove?"

Is the report a series of "gonna do's?"

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27

Sharing the Self-Study Report

28

28

Review of the Self-Study Report is crucial

- By the working groups – their product
- By the campus community – consensus
- By the governing board – consistent agenda
- By the Team Chair – ready for team

29

29

Bringing Closure to Writing

- Communicating to the institution's constituents
- Thanking the contributors
- Reflecting on the accomplishment and the learning
- Assessing the self-study process
- Advocating for the findings

30

30

Strategies for Selecting Materials for the Evidence Inventory

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31

Evidence Inventory

- A referenced resource for both the team and the institution to be used prior to, during, and after the On-Site Evaluation Visit.
- The documentation should be directly related to assertions made in the Self-Study Report and provide evidence demonstrating compliance with
  - Standards for Accreditation;
  - Requirements of Affiliation;
  - MSCHE policies, procedures, and guidelines; and
  - Applicable federal regulatory requirements.
- The Steering Committee is responsible for ensuring that it does not comprise a "document dump" of items that only tangentially relate to Commission standards or the institution's chosen priorities.

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32

Evidence Inventory

- Don't let the Evidence Inventory be a data dump.
- Curate the evidence. Which piece(s) best tell your story?
- Use a naming convention that is intuitive and easy for the peer evaluators to understand.
- All documents must be in PDF format
- You are limited to five links. Choose wisely.
- Review the Institutional Portal soon to become familiar with where uploads will go.
- Think of your team!

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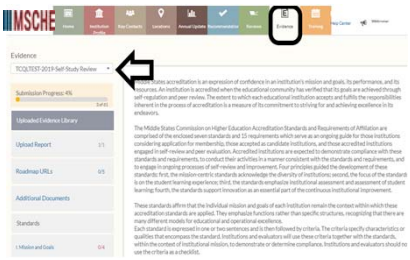
33

Uploading the Evidence Inventory

34

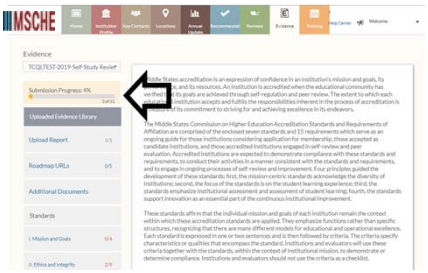
Evidence Tab



- Navigate to the **Evidence** Tab
- Navigate to the correct review using the drop-down menu
- Organized by Standards and Requirements of Affiliation

35

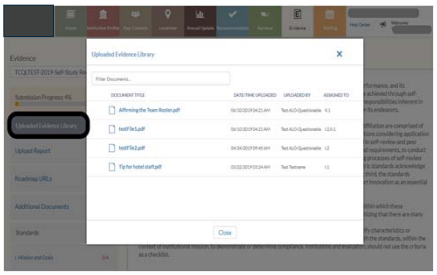
Submission Progress Bar



- Tracks completion of relevant criteria
- Does NOT track number of documents submitted
- Reflection that each section has been acknowledged

36

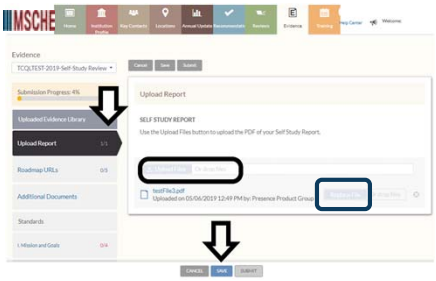
Uploaded Evidence Library



- Summary of all uploaded evidence
- All documents you upload for the Requirements of Affiliation or Standards for Accreditation (per criterion) will be added automatically
- Alternate to uploading a document multiple times for different Standards

37

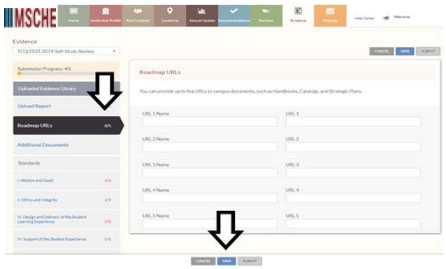
Upload Report



- Click Upload Files or drag and drop files
- Click the blue **Save** button to save file
- To replace an uploaded file, click the blue **Replace File** button

38

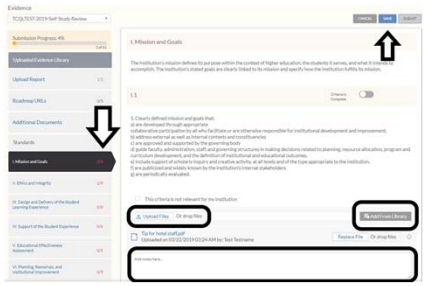
Roadmap URLs



- Include up to five URLs
- Examples: catalogs, handbooks, strategic plans
- Click the blue **Save** button

39

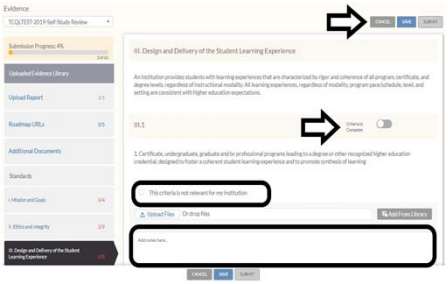
Standards



- Each Standard contains a set of criteria
- Can upload from Library OR upload new documents
- Optional free text box with 750 character limit

40

Standards cont..



- Check the box if this criterion is not relevant for your institution
- Must provide a justification in text box
- Click the **Criteria is Complete** button when you have completed each section
- Click blue **Save** button

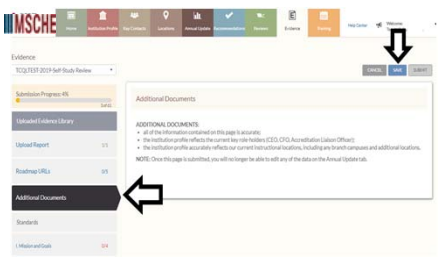
41

Requirements of Affiliation

- Institutions must respond to all Requirements of Affiliation
- If the Requirement does not apply, please indicate this by checking the **Criteria does not Apply** box
- If you have questions about whether or not the requirement is applicable, please contact your institutional liaison.
- Upload documents or associate files from your Evidence Inventory for each requirement.

42

Additional Documents



- Additional documents requested by the team
- Requests made by the Team Chair or the Vice Chair
- Listed in the Team Report
- Must be uploaded by institution
- Portal open for seven days after team visit

Accreditation Review Cycle and Monitoring Procedures

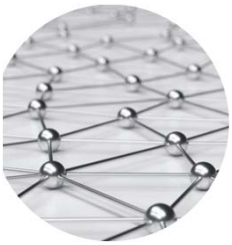
43

Important Notes

- Click the blue **Save** button frequently
- Confirm all sections are complete prior to submission
- Once complete, click the **Submit** button
- After submitting, you cannot make any additional changes in the portal

44

Resources for Help with the Evidence Inventory



- For technical issues:
  - support@msche.org
- For questions about applicable Requirement of Affiliation:
  - Contact the VP Liaison for the institution
- For questions about logistics:
  - emattson@msche.org or csmith@msche.org
- To view institution portal training videos:
  - https://www.youtube.com/playlist?list=PLlNY1ogrHGV2iNpAhTqmhe38xH_YyHXBL

45

Citing the Documentation

- Relevant Questions:
  - When references to the Evidence Inventory are made in the Self-Study Report, are these connections clearly communicated or referenced in the Report itself?
  - For documents that are necessary but appear complex to an outside reader, is it possible to annotate this information and/or provide excerpts of policies, procedures, reports and other information?
  - Do the document titles clearly identify the nature of the document? Are you using a consistent naming convention?
  - Does the documentation align with right-to-privacy regulations and respect the privacy of individuals?
- **Do not use hyperlinks**, except for the ones allowed on the portal.
- Cite the document by using parenthetical notations.

46

Break

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47

Preparing for the Evaluation Visit

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48

Who's Who For the Team Visit

The institution's MSCHE Vice President liaison remains available for consultation and to provide information to the institution and the Team Chair, but…

Once the Team Chair is appointed, the institution and the Chair discuss and agree on all matters related to the Self-Study Report and the visit.

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49

Building the Team

Chair	Commission Staff	Chair	Chair and President	Commission Staff	Chair and Institution
Accepts invitation	Sends institution initial information	Contacts the institution's President	Establish dates for preliminary visit and team visit	Commission staff produce a roster of prospective team members	Review the roster during the Preliminary Visit Institution affirms roster (no conflicts of interest)

Peer Evaluators Policy
Peer Evaluators Procedures
Conflict of Interest: Commission Representatives

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50

Timeline

After Team Chair's Preliminary Visit	*After Team Chair's Preliminary Visit*	*3 months before the visit*	*2 months before the visit*	*6 weeks before the visit*	*2-6 weeks before the visit*
Chair & Commission	**Chair**	**Chair, Vice Chair & Institution**	**Vice Chair & Team**	**Institution**	**Chair, Vice Chair & Team**
Confirms visits to additional locations and branch campuses (if necessary)	**Reports any concerns to the Commission**	**Develop preliminary agenda**	**Discuss with team members schedule/agenda, travel arrangements, technology needs, etc.**	**Uploads Self-Study Report and Evidence Inventory to the MSCHE secure portal**	**Organize assignment of standards and logistics for the visit, request additional information, etc.**

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51

How Institutions Prepare

- Guidance in *Self-Study Guide*, Module Seven: Hosting on On-Site Evaluation Visit
- Prepare the campus for the On-Site Evaluation Visit – follow Communications Plan
- Arrange for members of the Team to visit additional locations and/or branch campuses as necessary
- Prepare the Board for Team Chair's Preliminary Visit and for the On-Site Evaluation Visit

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52

Managing an Effective Team Visit

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53

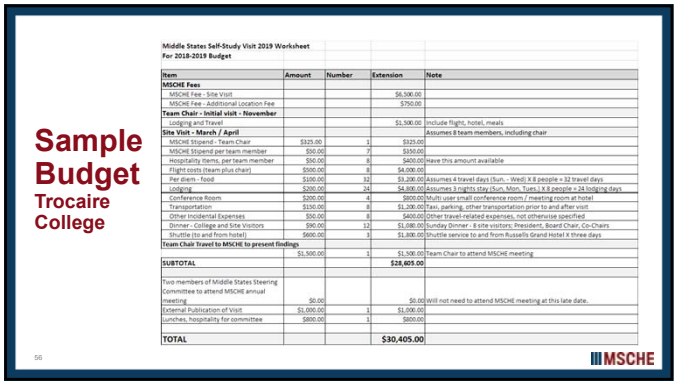
Managing an Effective On-Site Team Visit

Logistical elements to address:

- ✓travel arrangements
- ✓parking arrangements
- ✓lodging arrangements
- ✓travel arrangements for off-site visits
- ✓meals (dietary restrictions)
- ✓meeting rooms on campus
- ✓appointment schedules
- ✓ after-hours contact information
- ✓ contingencies for inclement weather
- ✓ technology needs
- ✓ nametags (team members and others)
- ✓ campus maps
- ✓ hotel meeting space
- ✓ reasonable accommodations for team members

54

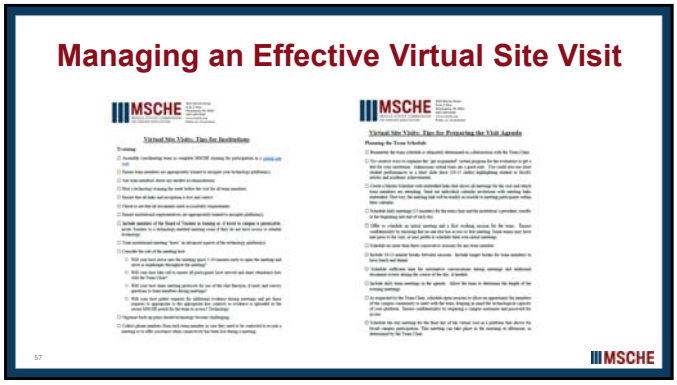
55



Middle States Self-Study Visit 2019 Worksheet
For 2018-2019 Budget

Item	Amount	Number	Extension	Note
MSCHE Fees				
MSCHE Fee - Site Visit			$6,500.00	
MSCHE Fee - Additional Location Fee			$750.00	
Team Chair - Initial visit - November				
Lodging and Travel			$1,500.00	Include flight, hotel, meals
Site Visit - March / April				Assumes 8 team members, including chair
MSCHE Stipend - Team Chair	$325.00	1	$325.00	
MSCHE Stipend per team member	$50.00	7	$350.00	
Hospitality items, per team member	$50.00	8	$400.00	Have this amount available
Flight costs (team plus chair)	$500.00	8	$4,000.00	
Per diem - food	$100.00	32	$3,200.00	Assumes 4 travel days (Sun. - Wed) X 8 people = 32 travel days
Lodging	$200.00	24	$4,800.00	Assumes 3 nights stay (Sun, Mon, Tues.) X 8 people = 24 lodging days
Conference Room	$200.00	4	$800.00	Multi user small conference room / meeting room at hotel
Transportation	$150.00	8	$1,200.00	Taxi, parking, other transportation prior to and after visit
Other Incidental Expenses	$50.00	8	$400.00	Other travel-related expenses, not otherwise specified
Dinner - College and Site Visitors	$90.00	12	$1,080.00	Sunday Dinner - 8 site visitors; President, Board Chair, Co-Chairs
Shuttle (to and from hotel)	$600.00	3	$1,800.00	Shuttle service to and from Russells Grand Hotel X three days
Team Chair Travel to MSCHE to present findings				
	$1,500.00	1	$1,500.00	Team Chair to attend MSCHE meeting
SUBTOTAL			**$28,605.00**	
Two members of Middle States Steering Committee to attend MSCHE annual meeting	$0.00		$0.00	Will not need to attend MSCHE meeting at this late date.
External Publication of Visit	$1,000.00	1	$1,000.00	
Lunches, hospitality for committee	$800.00	1	$800.00	
TOTAL			**$30,405.00**	

56



57

Dr. Alberto López

EDP University of Puerto Rico

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58

Sample Schedule

EDP UNIVERSITY

Middle States Commission on Higher Education (MSCHE)
Reaffirmation of Accreditation Virtual Visit

October 12-15, 2020
SCHEDULE

TIME	ACTIVITY	PARTICIPANTS	EVALUATORS
Monday, October 12, 2020			
3:00-5:00pm	Welcome meeting	President, Provost, Executive Team, Steering Committee Members, Deans and representation of the Board of Trustees	Evaluation Team Chair Evaluation Team Members
4:00-8:00pm	Evaluation Team Meeting	Via Zoom – Organized by Dr.	
Tuesday, October 13, 2020			
TIME	ACTIVITY	PARTICIPANTS	EVALUATORS PER STANDARD
9:00-9:40am	Meeting with President and Provost		Team Chair
9:45-10:45am	Meeting with Self-Study Steering Committee	Chairs and Co-chairs per Standard	Evaluation Team Chair Evaluation Team Members
10:50-11:30pm	Meeting with the Executive Committee	Provost, Self-Study Chair, Self-Study Co-Chair, Self-Study Coordinator	Evaluation Team Chair and Evaluation Team Members
11:40-12:40pm	Meeting with Work Groups for Standards I and II	Representation of Working Groups for Standards I and II and personnel from related areas	
	Meeting with Work Group for Standard VI	Representation of Working Group for Standard VI and personnel from related areas	
LUNCH BREAK – 1:00-2:00pm			
2:00-3:00pm	Meeting with Board of Trustees		

59

EDP UNIVERSITY

Middle States Commission on Higher Education (MSCHE)

Reaffirmation of Accreditation Virtual Visit
October 12-15, 2020
SCHEDULE

TIME	ACTIVITY	PARTICIPANTS	EVALUATORS	TEAMS ACCESS LINKS	
Monday, October 12, 2020					
3:00-5:00pm	Welcome meeting	President, Provost, Executive Team, Steering Committee Members, Deans and representation of the Board of Trustees	Evaluation Team Chair Evaluation Team Members	Join Microsoft Teams Meeting Learn more about Teams | Meeting options	• Gladys Nieves • Marilyn Pastrana • Luis Rivera • Alberto López • Doris Rodríguez • Marjorie Massonet • José Mercado • Marcelino González • María de los Milagros • Margarita Flores • Sandra Arroyo • Bessa Ortiz • Enid Cartagena • Lilliam Alers • Nydia Rivera • Alice Casanova • María Luz Pastrana • Luis Foster

60

LUNCH BREAK 12:00-1:00pm					
1:15-2:15pm	Meeting with Full-Time Faculty		Team Members	Join Microsoft Teams Meeting Learn more about Teams | Meeting options	Hato Rey, San Sebastian, Manati, Humacao, Villalba • Larissa Vargas • Luis De León • Ramonita Morales • Rosita Robles • Sonia Robles • Héctor Rosado • Lydia Quintana • Gloria Fernandez • Maribel Parson • Angel Manel • Hortensia Esquilín • Mancarmen Alvarado • Dana Torres • Eliot Rivera • José Ruiz • Lauette Cobano • María Teresa Arias

61

61

The Oral Exit Report

Everything that is mentioned in the oral report will be in the written Team Report. All critical findings of the team will be reported.

But the Chair **does not** report on the Team' s **proposal for Commission action**, because that is not final until the Commission acts.

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62

More on the Oral Exit Report

Notification of the Commission's action will be sent within 30 days of the Commission meeting. Because the process is not complete until then, **you should not make public statements** about the outcome of the visit until after receipt of the notification.

The report is **for your information**; it should **not be transmitted** in any way beyond the campus community.

Once the report is complete, the visit will conclude. Questions and comments are not appropriate at this point, and you will have the opportunity to provide a full institutional response to the written team report.

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63


After the Visit
64
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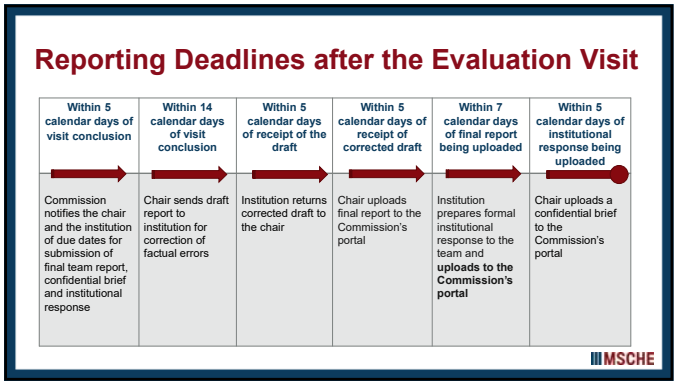
64


Reporting Deadlines after the Evaluation Visit
Within 5 calendar days of visit conclusion
Commission notifies the chair and the institution of due dates for submission of final team report, confidential brief and institutional response
Within 14 calendar days of visit conclusion
Chair sends draft report to institution for correction of factual errors
Within 5 calendar days of receipt of the draft
Institution returns corrected draft to the chair
Within 5 calendar days of receipt of corrected draft
Chair uploads final report to the Commission's portal
Within 7 calendar days of final report being uploaded
Institution prepares formal institutional response to the team and uploads to the Commission's portal
Within 5 calendar days of institutional response being uploaded
Chair uploads a confidential brief to the Commission's portal
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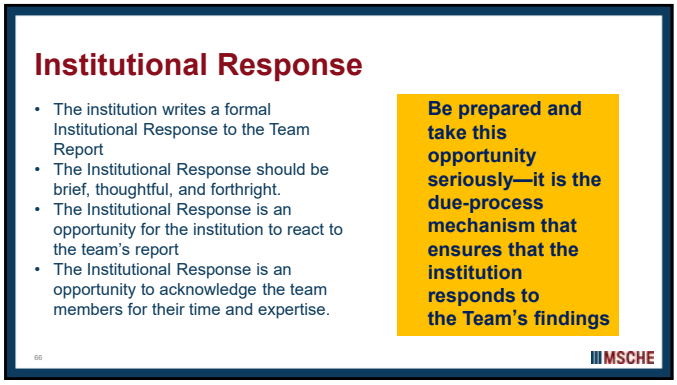
65


Institutional Response
• The institution writes a formal Institutional Response to the Team Report
• The Institutional Response should be brief, thoughtful, and forthright.
• The Institutional Response is an opportunity for the institution to react to the team's report
• The Institutional Response is an opportunity to acknowledge the team members for their time and expertise.
Be prepared and take this opportunity seriously—it is the due-process mechanism that ensures that the institution responds to the Team's findings
66
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66

More on the Institutional Response

- The Institutional Response is presented in the form of a letter addressed to the President of the Middle States Commission on Higher Education.
- The Institutional Response **MUST** be uploaded to the Institutional Portal.
- The letter should be submitted by the institution's CEO on institutional letterhead within seven calendar days of the date the team report was uploaded to the MSCHE portal.
- The letter is typically between 1 and 5 pages in length, though it should not exceed 25 pages.
- If the institution disagrees with the team's findings, the institution should present their views as honestly and openly as possible.

67 MSCHE

67

Content of the Institutional Response

- If institution is found in compliance, with no recommendations, in the letter the institution:
  - Acknowledges the team's work.
  - Acknowledges the team's report and states institution's agreement with it.

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68

Suggested format if institution is found in compliance, with added recommendations

- Acknowledge team's work.
- Address each of the recommendations by Standard (subheadings are helpful).
- Include team's recommendation(s)
  - If agree with recommendation, acknowledge recommendation.
  - If disagree with recommendation, provide information and a reasoned argument that, in the institution's view, demonstrates compliance with the standard (or Requirement of Affiliation, if that is the case). Provide evidence of full compliance; assertions are not enough.
  - Response may point to different interpretation of evidence, or information that is new and/or is a recent development.

69 MSCHE

69

Suggested format if institution is found in non-compliance

- Acknowledge team's work.
- Address each of the requirements by Standard (subheadings are helpful).
- Include team's requirement(s)
  - If agree with requirement, acknowledge requirement.
  - If disagree with requirement, provide information and a reasoned argument that, in the institution's view, demonstrates compliance with the standard (or Requirement of Affiliation, if that is the case). Provide evidence of compliance; assertions are not enough.
  - Response may point to different interpretation of evidence, or information that is new and/or is a recent development. Do not include information that was in existence but was not provided to the team before or during the visit.

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70

Surprises about the Evaluation Visit

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71

Policies & Procedures

POLICIES, PROCEDURES & GUIDELINES

The Policies, Procedures, and Guidelines shown below are in effect.

Title	Document
Accreditation Actions Policy	Accreditation Policy
Accreditation Actions Procedures	Procedure
Accreditation Activities Guidelines	Guideline
Accreditation Review Cycle and Monitoring Policy	Accreditation Policy
Accreditation Review Cycle and Monitoring Procedures	Procedure

https://www.msche.org/policies-guidelines/

72 MSCHE

72

Resources

- Standards for Accreditation and Requirements of Affiliation (Web videos)
- Self-Study Guide for Institutions with Visits from 2019 and on
- Verification of Compliance with Accreditation-Relevant Federal
- Regulations (booklet)
- Institutional Federal Compliance Report (template)
- Your Vice President Liaison

73 MSCHE

73

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74

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Thank You!

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75

75