Centre Reviews: Strategies for Success

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EDUCATIONAL DEVELOPMENT GUIDE SERIES
NO. 3

EDC • RFPES
Educational Developers Caucus
le Réseau de formateurs en pédagogie de l'enseignement supérieur

Educational Development Guide No. 3. Centre Reviews: Strategies for Success

ISBN: 978-0-9949335-2-2

Recommended Citation:
Ellis, D.E., Chu, S.T.L., Popovic, C., Rolheiser, C., Le-May Sheffield, S., Wolf, P., & Wright, W.A. (2018). *Educational Development Guide Series: No. 3. Centre Reviews: Strategies for Success*. Ottawa, ON: Educational Developers Caucus.

Educational Development Guide Series: stlhe.ca/affiliated-groups/educational-developers-caucus/guides

ISSN: 2369-9019

The Educational Development Guide Series is coordinated by the Vice-Chair of Professional Development of the Educational Developers Caucus. The series coordinator for this Guide was Jessica Raffoul, University of Windsor.

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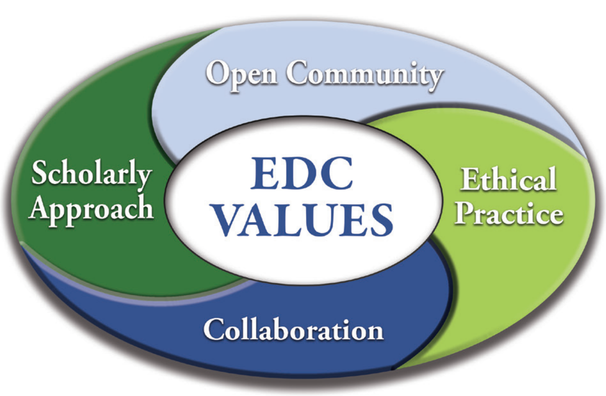
Educational Developers Caucus

As a community of practice, the Educational Developers Caucus engages individuals in educational development across Canada to network, share resources, collaborate on key issues through action groups, and connect through professional development opportunities.

Since the initial working group in 2001 and the establishment of EDC within the Society for Teaching and Learning in Higher Education in 2003, our community has grown. Reflecting our continuing evolution, our Living Plan is regularly renewed by our community to describe our evolving practices and needs throughout our community providing a framework for aligning our professional development initiatives including grants, conferences, institutes, action groups, and webinars.

Our initiatives reflect our values of:

- **Open community** - We welcome all persons who share an interest in educational development work. We seek and value diverse perspectives on this work and the individual backgrounds, expertise, and wisdom ED professionals bring to our community.
- **Collaboration** - We encourage freely sharing our collective knowledge about educational development and related topics for our mutual benefit. We support a collaborative and peer-facilitated model of professional development for our members at all career stages.



- **Ethical practice** - We demonstrate integrity and transparency in all our interactions. We uphold the highest possible values in collegial scholarship, crediting others for their contributions, and undertaking all work according to accepted ethical practices and policies.
- **Scholarly approach** - We take a scholarly approach to our work, drawing on a variety of resources and contributing to that knowledge through our own scholarly inquiry. We embody multiple approaches to scholarship and its sharing so others can benefit from our work.

About the Educational Development Guide Series

The Educational Development Guide Series offers in-depth, open, scholarly, collaborative, and practical resources for new to experienced educational developers.

With the aim of embodying and furthering evidence-informed reflective practice in educational development, ED Guides are expected to:

- provide a practical and applied resource for educational development practice;
- draw on established literature and/or research, in addition to lived practice;
- reflect diverse contexts and perspectives within educational development;
- achieve high quality writing through constructive peer-review; and
- draw on the richness of our community by inviting contributions or collaboration from EDC action groups, ED colleagues, and/or others in response to a call for expressions of interest or initial conference sessions.

Further details of our ED Guides' planning and creation process can be found online.

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Note: Ellis & Chu also served as editors for this Guide.

Foreword

Joy Mighty

Many years ago when I was invited to serve as an external reviewer of a Centre for Teaching and Learning for the first time, I searched the growing educational development literature for guidance on how to proceed. I found none. My two colleagues on the external review team were, like me, seasoned Centre directors who were also serving in this capacity for the first time. That we could find no instructive resources was not at all surprising, as the practice of reviewing Centres was relatively new at that time. Drawing on our combined instincts, experiences of leadership, diverse disciplinary backgrounds, skill sets, and research traditions, and with a lot of luck on our side, we managed to conduct a successful review.

Over the years, as Centres have matured and the perceived need for reviews has grown, educational developers in Canada have consulted each other for informal advice and guidance on performing this critically important component of our work. But there has never before been a well-documented, coherent, and constructive Guide for reviewees and reviewers alike on the process of conducting reviews of educational development Centres in Canada and beyond. Thankfully, no other reviewer or reviewee will ever have to "wing it" as we did at the turn of the century. *Centre Reviews: Strategies for Success* now exists as a practical Guide on the preparation and conduct of reviews.

The authors of this seminal work are among the movers and shakers of the educational development profession in Canada. They bring to this Guide, not only their vast knowledge and combined experiences of reviews, albeit from different contexts and perspectives, but also a singular commitment to the educational development profession in Canada and beyond. They have been witnesses, contributors, and leaders of a movement that has evolved over time to become the foremost authority on educational development across the globe. They are therefore well positioned to offer advice on an aspect of the field that is vital to its sustainability, continued professionalization, and success.

As this Guide makes clear, a review provides answers to important questions about a Centre's purpose, function, structure, activities, and impact. The process is reflective, rigorous, and systematic, and provides valuable information on the appropriateness and effectiveness of the Centre's mandate, mission, alignment with its institutional strategic plan, programs and services, organizational structure, staffing, and other resources. A thorough and comprehensive review, such as this Guide describes, provides an evaluation and assessment of the Centre's status and performance, offers transparency and accountability to all Centre stakeholders, and enables evidence-based decision-making about the future direction of the Centre.

A particular strength of this Guide is its exploration of the review process from the perspective of both reviewees and reviewers. Having experienced both processes, I am acutely aware of how these roles differ, but how, paradoxically, they intersect in a symbiotic relationship that enriches the results of the entire review process. The comprehensive treatment of both perspectives heightens the relevance and importance of this Guide to the educational development community, as well as to senior administrators who are ultimately responsible for Centres and their reviews. A related strength is the Guide's relevance and applicability to diverse institutional contexts. Whether a Centre is serving the needs of a university, college, or polytechnic, and regardless of geographical location, its reviewers will find practical advice that will facilitate the review process.

As the field of educational development has evolved over the past sixty years, it has expanded in scope and responsibilities, impacting approaches to teaching and learning in higher education and the cultures underlying those approaches. At each juncture in its evolution, new issues have emerged to challenge the field's relevance and sustainability, and each time dedicated individuals and groups have risen to the occasion to provide leadership and guidance for meeting those challenges head on. The result has been a stronger, more enlightened and professional educational development community that is empowered to continue playing a significant and impactful role in teaching and learning in higher education.

Centre Reviews: Strategies for Success is a case in point. As Centre reviews grow in importance and frequency, this comprehensive Guide, with its description of an array of proven and effective practices, will be a useful resource to those charged with arranging and executing such reviews, regardless of their institution's context. It will help reviewers and reviewees everywhere, in various types of higher education institutions, to undertake the process with enthusiasm and confidence. The entire international educational development community owes an enormous debt of gratitude to the authors for sharing their insights and experiences about successful strategies for engaging in such a monumental process.

Joy Mighty, PhD
Associate Vice-President (Teaching and Learning), Carleton University
Past President of the Society for Teaching and Learning in Higher Education
Inaugural Chair of the Educational Developers Caucus

I. Introduction

Welcome to the Educational Development Guide on Centre[1] Reviews! You are likely reading this Guide because you are considering or are about to engage in a Centre review. You may be the senior administrator who has commissioned a review, a member of the Centre being reviewed, or an internal or external reviewer. This Guide provides assistance for those of you in any of these roles.

The authors of this Guide are educational developers who have all participated in Centre reviews as reviewees, reviewers, or both, and we understand how challenging it can be to engage in this process. Many of us did so with little guidance or direction since reviews of support units are often not part of an institution's systematic review process. In addition, there is a certain amount of mystique surrounding Centre reviews since the processes are typically confidential and the documents involved, such as self-studies or reviewers' reports, are not often readily available. As a result, we are left with many questions, such as:

- What should you include?
- How long should such reports be?
- What kinds of data are most compelling?
- How does the site visit work?

Based on our various experiences of being reviewed and serving as reviewers, our goals in this Guide are to address these types of questions, raise additional ones for you to think through, and share specific ideas and approaches to help you save time and feel more confident in your approach.

Reviews of Centres are occurring more frequently across North America, and the Educational Developers Caucus recognized a need to make this process more transparent for all involved. This Guide is intended to provide such transparency.

Defining Centre Reviews

A Centre review involves a process of critical reflection on high-level, strategic questions about the direction and the work of a Centre, and it is completed by members of that Centre as well as selected colleagues external to the unit. A Centre review is typically comprehensive and longitudinal, going well beyond an assessment of an individual program or even an assessment of the whole Centre for an annual report.

[1] We use the term "Centre" throughout this Guide as a generic title for the unit responsible for educational development at an institution.

Centre reviews may be internal, external, or combined. As such, the selected colleagues involved in the review may be internal to the Centre's institution (internal reviewers) and/or from other institutions (external reviewers). The process also typically includes: 1) Centre staff collaboratively developing a comprehensive self-study document; 2) a site visit; and 3) a reviewers' report that highlights key findings and recommendations for further consideration. Finally, Centre staff often develop a report in response to the reviewers' report, indicating the actions they will take, if any, to address the reviewers' ideas. Alternatively, the Centre's response to the reviewers' recommendations may be built into subsequent Centre strategic plans and annual reporting.

Benefits of Reviews to Centres and Institutions

Why might an institution or a Centre want to undergo review? Numerous reasons exist that are benefits to all involved:

1. For the Centre, a review **provides the impetus to step back and reflect** on important, strategic questions such as: Do you have an accurate mandate and mission? Are your activities aligned with your mission and strategic plan? What is the impact of your programs and services? What should you stop doing? What should you start doing? Are your processes effective and efficient? Do you have appropriate and sufficient staffing and a functional organizational structure? These bigger questions are hard to tackle in our day-to-day work, and yet they are critical to address, at least every few years, as part of assessing the direction of a Centre.
2. The review process can **provide team-building** for the Centre staff. Often everyone in a Centre is involved in the review process in roles such as self-study authors, data collectors, and site-visit participants. A review enables your team to work together to value the Centre's history while making plans for the future.
3. Beyond the Centre's staff, a review—whether internal or external—also **enables senior administrators to think about key ways the Centre can contribute** to the institution, future directions for the Centre, and the overall status of teaching and learning at the institution.
4. For external reviews, **gaining feedback and ideas from expert colleagues outside of your institution** is invaluable. These reviewers can provide alternative perspectives and point out issues that you no longer see or do not know how to address. They can also highlight key strengths and achievements that you need to acknowledge and celebrate. And their insights may give you leverage for ideas that you want to try but that need external endorsement.
5. For an institution, an external review can also **provide valuable insights** into how the work of your Centre compares with that of your peer institutions. Is your Centre adequately resourced? Is it offering educational development programs and services that are known to be effective? What should it prioritize in the coming years?
6. Finally, engaging in a review signals to your institution that you are **engaged in an academically rigorous process**, and that you are experiencing a process similar to the academic program review process that many of us help to support.

Overview of the Review Cycle

Many benefits can come from engaging in a Centre review. What might the process look like?

Each Centre may include some unique elements in the review cycle, but a general cycle appears in *Figure 1*. It resembles the cycle used for academic program reviews.

Figure 1. The Review Cycle

For a Centre, the process may take a year or more from making the decision to engage in a review through to the completion of the self-study, depending on data collection needs and staff resources available to work on the document. The self-study would normally go to the reviewers at least one month before the site visit, and the reviewers' report would come back within one to two months after the review. The Guide provides more details, along with concrete examples, about each stage of the review cycle. Reviews may be done according to a cyclical schedule, in which case, the outcomes of one review would normally feed into the subsequent review's cycle. The timing for repeating the cycle will depend on the reason for the review and your institution's context. *Table 1* shows a timeline estimate for the key steps in the review process that occur after clarifying the rationale for doing the review and identifying the stakeholders.

Table 1. Timeline Estimate for Key Steps in the Review Process

Time Estimates	Steps in the Review Process
PREPARING THE SELF-STUDY	
6-12+ months	• Select team to prepare the self-study • Develop terms of reference questions • Analyze data to address terms of reference questions and, if time permits, collect and analyze any additional data • Write the self-study
BEFORE THE SITE VISIT	
3-6 months	• Select a date for the site visit • Identify and invite reviewers (more lead time is better!) and get travel and hotel arrangements booked • Prepare site-visit schedule and book meeting rooms
1-2 months	• Submit the self-study for distribution to reviewers—reviewers to read the materials sent, create questions, and identify emerging themes • Book participants for site-visit meetings

Time Estimates	Steps in the Review Process
1 month or less	• Finalize site-visit details, such as catering and room set-up • Follow up with any unconfirmed participant invitations • Confirm itinerary with reviewers and indicate how they are to be reimbursed for expenses
HOLDING THE SITE VISIT	
1-3 days	• Engage in the site visit
AFTER THE SITE VISIT	
1-2 months	• Receive reviewers' report
3-4 months	• Respond to reviewers' report

Overview of the Guide

Broadly, the overall structure of the Guide is chronological, being divided into three main parts. In *Chapter II*, we set the context for reviews as an evaluation practice, providing an environmental scan on the prevalence and use of reviews internationally and in Canada. *Chapter III* comprises the bulk of the Guide and focuses on the steps in the review process from the perspective of those being reviewed. You will find descriptions of each stage, along with practical strategies and advice. Examples from actual review process documents are included for you to adapt to your needs and organizational context. The process of being an external reviewer is the focus of *Chapter IV*. In this section, you will read about the key steps involved for those serving as reviewers, from preparation through to creating the final report. The Guide ends with concluding comments, a reference list, and appendices.

The primary audience for this Guide is educational developers, many of whom will both be reviewed and serve as reviewers, although not for the same review! When you are being reviewed, *Chapter III* will be your best resource, whereas when you are a reviewer, *Chapter IV* will be most important. Our Guide is also intended for those who oversee reviews (whether a senior administrator or a staff member who is responsible for institutional unit reviews). Our hope is that all readers will benefit from the entire Guide to gain insights into the whole process from the different perspectives of those involved.

To keep the Guide informal and engaging, we have used second person pronouns ("you") throughout. In the introductory and concluding sections, "you" addresses all types of readers. However, in *Chapter III*, "you" refers to reviewees, while in *Chapter IV*, it refers to "reviewers". We will remind you about this shift at the start of those two chapters.

II. Environmental Scan

In this chapter, you will learn about:

- Prevailing Centre review practices in the United States, Australia, the United Kingdom, and Canada

While periodic Centre reviews in post-secondary institutions are likely to become increasingly commonplace over the next few decades, these reviews, whether ad hoc, punctual, periodic, or systematic, are by no means a shared experience of all post-secondary institutions at this time. In addition, the practice of reviewing Centres over the last two decades has not been carefully documented. Despite limited resources, this chapter seeks to provide a brief overview of the development and practice of periodic Centre reviews from a sampling of countries. In particular, we briefly review the formal research in the United States (US) on evaluating the work of Centres, the initiatives of Centre directors in Australia, and the less evident push for overall Centre reviews in the United Kingdom (UK), before exploring the Canadian experience with Centre reviews. This approach moves from the formal to the less formal, providing insights into the limited background available.

We hope that this Guide will support Canadian and international efforts to have increased transparency and investigation into Centre review practices in a constructive and informed manner.

Evaluation, Assessment, and Review: New Developments in the United States

Turning first to the educational development environment in the United States (US) helps us to recognize and distinguish among levels of initiatives to examine the work of Centres. In research sustained over the past decade, Sue Hines of Saint Mary's University of Minnesota has defined three levels of examining a Centre's work, described the features of sound practices, traced the incidence of Centre assessment and review in the US, and articulated a comprehensive four-phase model that could be adapted for Centre reviews (Hines, 2017a, 2017b).

Speaking at the anchor plenary of the POD Network's annual conference in Montréal, Québec, Hines (2017a) defined three levels for examining a Centre's work:

- **Micro level = program evaluation** as an exercise in "determining the worth and merit of individual programs" offered by a Centre
- **Meso level = program assessment** as an operation of "determining the extent to which a program's outcomes are being met"
- **Macro level = program review** as a process aimed at "determining the overall quality and effectiveness of the Centre"

Whatever the level of examination, Hines (2017a) proposes the use of a similar quality improvement cycle that includes stages from determining knowledge needs, followed by collecting and reviewing data, then creating and using reports. This cycle suggests that the review practice is cyclical and is based on the need for quality enhancement as much as quality assurance. For the purposes of this Guide, the macro level is the most relevant, and a cyclical process for Centre reviews was described in the Introduction.

In the US, Centres are increasingly aware of the need to assess and evaluate their practices. While about 20 percent of American Centres reported attention to assessment activity in the mid-1970s, virtually all Centres reported involvement in some degree of systematic assessment of their activities by the year 2011, although not all engaged in Centre reviews (Hines, 2017a).

Hines (2017b) has also developed a rare field-tested model for Centre program evaluation, which could be adapted to various types of Centre evaluation. Centres from nine North American universities and colleges (including a Faculty of Science Centre at the University of Calgary) were involved in this extensive study. The following four-phase model was field-tested over three years:

1. **Evaluation Capacity Analysis** identifies and adjusts, as necessary, a Centre's evaluation capacity
2. **Curriculum Conceptualization** involves a series of steps: articulating outcome statements, defining offerings into distinct programs, mapping programs to outcome statements, and crafting program goals
3. **Evaluation Planning** involves identifying methods and strategies as well as the evaluators and the evaluation calendar
4. **Plan Implementation** involves the collection, analysis, interpretation, and use of the data

This model is of particular interest and can be recommended to a Centre ready to implement a review process after a sustained effort to implement the first two phases as described above. Many reviews are undertaken within the constraints of a more limited timeframe, however, and the first two phases may get short shrift, leading those involved in Centre reviews to end up using only the third and fourth phases.

The Collective Efforts of Centre Directors in Australia

Turning our attention to Australia, we find the development of a systematic review framework proposed by Centre directors. In 2011, the Council of Australian Directors of Academic Development (CADAD) published a practical guide for their members. Titled *Benchmarking Performance of Academic Units in Australian Universities*, the document defines eight domains of practice for benchmarking the work of what are commonly called "academic development units" or ADUs in that country.

The CADAD guide (2011) aims to define the essential "mission and core business" of ADUs and to advocate for "collaborative peer assessment of performance", all the while recognizing the varying "level of maturity" of the units and designing the process as a continuous enhancement plan. Their guide addresses two main needs:

1. To identify "the strategic contributions of academic development units" in response to "more competitive higher education environments", and
2. To put the "spotlight on academic development unit performance" due to the increasing importance of "institutional performance in learning and teaching" and its relationship to the "preservation of university reputations" (CADAD, 2011, p. 7).

The CADAD document offers rather than prescribes what it calls eight key "domains of practice" for those interested in Centre reviews to consider. The domains are:

1. Strategic Policy and Governance
2. Quality of Learning and Teaching
3. Scholarship of Teaching and Learning
4. Professional Development
5. Credit-Bearing Programs in Higher Education
6. Curriculum Development
7. Engagement
8. ADU Effectiveness

CADAD, 2011, p.7

Each domain has two to five "sub-domains" to guide assessment activity as well as additional information (e.g., descriptions of current practice and evidence of performance). The guide then invites an "ADU Self-Assessment" of the domain and the "Benchmarking Partner's Assessment" of the domain. Developers are encouraged to evaluate performance on a five-point scale, ranging from "Beginning-Developing" through "Functional-Proficient" and "Accomplished-Exemplary" (CADAD, 2011, p. 62).

Several features of the Australian model are noteworthy. First, the Centre leaders took the initiative to write and produce the guide to performance evaluation. Second, the unit heads proposed a peer collaboration approach to developers across the country. Third, common domains of practice were identified and defined. Fourth, the unit heads acknowledged the evaluative process as one of growth and development, basing their work on the notion of "benchmarking", acknowledging the various stages of Centre and program maturity, and promoting the idea of continuous improvement. Finally, the CADAD initiative can be seen as a response to an environment where accountability and quality assurance rule: better to take the initiative to determine the evaluative criteria for our important work than have the terms and conditions of evaluation imposed by external forces.

Tradition and Change in Educational Development in the United Kingdom

Accountability and audits are also common in the UK, but the instance of overall Centre reviews has not been extensive or consistent. Canadian educational developers and other stakeholders involved in Centre reviews can learn from what one writer calls the "complex and contradictory reality" of educational development in the UK (Gosling, 2009).

Educational development in the UK began in the 1960s, and the national requirement for all universities there to provide professional development to all incoming teaching staff dates back to the latter part of the last century (Gosling, 2009, p. 6). While educational development in the UK is seen as "relatively established" compared to many other countries, the field is also seen as an area of uneven development in terms of direction and importance among institutions (Gosling, 2009, p. 6).

Nearly a decade ago, Gosling (2009) identified critical contextual elements of a Centre in any country: history, growth, institutional status, strategic role, organizational volatility, and responsibilities. He also highlighted the impact of external pressures. For example, in the UK context, national priorities such as the Teaching Quality Enhancement Fund and the national priorities of the Higher Education Funding Council of England have promoted such activities as "enhancing the employability of the graduates" and "research-led teaching" (Gosling, 2009, p. 10). These external pressures and the means by which a given Centre navigates new and changing demands are important for a Centre to explain. However, these various elements, while useful for Centre analysis, were not described in relation to Centre reviews.

Similarly, more recent work by Bamber and Stefani (2016) points to "the challenge of evidencing value in educational development" (p. 242). The authors discuss a model adapted later in this Guide (see *Chapter III, Section E*) to assist with writing a self-study. They suggest "systematic approaches" to "evaluative practices" of educational development activities which are theoretically "applicable at different organisational levels", but they fall short of any suggestions or guidance in applying their theoretical model to the overall review of a Centre in the UK or elsewhere (Bamber & Stefani, 2016, p. 252).

So, despite the relatively long history of educational development in the UK, the push to do comprehensive Centre reviews seems limited and without any national-level guidance. Why might this be? Recent listserv communications with members of the Staff and Educational Development Association (SEDA) indicate that educational developers in the UK feel that they are already involved in many forms of program evaluation processes (such as formal reviews of their faculty teaching certificate programs).

One SEDA member in the UK observes that, as a regular visitor to the US, the higher education system in the UK is much more "regulated" and subject to "audit" than the US system. As such, he suggests that "appetite for any more review doesn't strike me as that great in the UK—for senior managers, perhaps, but not for academic workers" (Lea, 2018).

When reviews have occurred, concern emerged particularly when they were ad-hoc, often without external recommendations, instead being seen as a means for senior administrators to restructure, relocate, or re-scope Centres. The suggestion here is that the changes made by senior administrators are not always evidence-based, leading some UK educational developers to advocate that Centres adopt "some formal review mechanism with external input which will be both useful and fair" (Hartley, 2018).

Perhaps the combination of new work on the theoretical level as mentioned here—along with an expressed desire to have a review process designed to counter arbitrary decisions about the structure and mandate of Centres—may lead to increasing instances of external Centre reviews in the UK, despite clear evidence of evaluation and audit fatigue among educational developers.

Reviews of Centres in Canada: Past, Present, and Future

Unlike evaluation practices in the US and Australia, the practice of Centre reviews in Canada neither has a long history nor is well-documented.

McGill University's Centre was established in 1969 and a handful of Canadian units date back to the 1970s, but the period of the 1980s and the 1990s might be called one of emergence for such Centres in Canada. The idea of a structured system for Centre reviews did not take hold on a widespread basis, however, during the course of those two decades. For example, in the early 1990's, when a Centre head from Atlantic Canada sought advice concerning a framework for Centre reviews from a leading educational developer in Central Canada, there was no advice to share. While the Central Canadian developer's office had opened almost twenty years before, neither he nor the Centre itself had been formally reviewed—internally or externally.

This kind of evaluation initiative was not common to the culture of a Centre before the turn of the century. What is more, the initiation or imposition of Centre reviews was not a preoccupation of senior academic administrators either. This situation may not be surprising, however, given that staff at Centres only started to be involved in academic program reviews within the last decade or so. This shift in focus for educational development work may well have helped to inform the emergent practices being used in Centre reviews today.

In parallel to the founding and growth of our Centres, the development of a recognizable and recognized profession of Canadian educational developers was also emerging during the latter part of the twentieth century. Wilcox (1998) identified six major activities of heads of Centres as:

- Advocacy for teaching
- Design and delivery of educational development activities
- Internal and external communication and networking
- Providing teaching and learning expertise
- Supervising Centre staff
- Undertaking scholarly activity

Educational developer roles were becoming better defined, but it was still early years in terms of readiness to assess Centre impact (Wilcox, 1998). There were, however, some simple but powerful notions dominating the agendas of the educational developers whom Wilcox surveyed. The developers defined a triple purpose for the work of their Centres: assisting faculty, challenging the status quo, and empowering faculty (Wilcox, 1998). Could the success of a Centre be measured against these three basic functions?

Since the turn of the century, anecdotal evidence based on our experiences as seasoned educational developers who have engaged in Centre reviews indicates that many Centres from all regions in Canada, particularly from the university sector, have initiated or been subjected to a Centre review. In some instances, there have been at least two reviews over a ten-year period. As well, a few institutions have formal procedures for reviewing academic support units, but many others do not. In addition, much of the information surrounding the impetus, conduct, and results of the reviews is a matter of institutional history and has not been tracked on a systematic basis or made public.

This Guide constitutes a first attempt to bring together collective wisdom and provide practical guidelines for use at the institutional level in this country and beyond. No current empirical data about Canadian Centre reviews was found, highlighting a gap for our national professional association to address to assist our members and provide benchmarking data that represent the Canadian context. In writing this Guide, we have drawn on our personal experiences and documentation collected from exchanges with colleagues from across the country and internationally. Future iterations of this Guide may be supported with data gained from more formal pan-Canadian investigations on the concrete experience of Centre reviews.

In Summary

Although our international scan of the practice of Centre reviews indicates relatively little common ground from one country to the next, the scan also reinforces the need to share findings, perspectives, narratives, and models.

In Canada, the need for a publication has grown out of a common concern for guidance in the preparation and conduct of reviews. In the US, researchers are striving to establish workable models in the context of an assessment culture that is growing in importance. In Australia, Centre directors have themselves taken the lead, introducing benchmarking and peer evaluation processes. In the UK, despite the well-established community of developers and the presence of Centres in all universities, leading educational developers appear to be relatively unconvinced of the need for formal Centre reviews.

While Canadian educational developers understand that senior academic administrators oversee our Centres and have the authority to control the destinies of our efforts, we as the authors of this Guide are convinced of the importance of evidence-based decision-making. As such, we are pleased to offer this Guide, which can serve as a valuable resource for all stakeholders and contribute to rigorous data collection and interpretation for future Centre reviews.

III. Engaging in a Centre Review

This chapter outlines the key components of undertaking the review of a Centre. As such, it addresses this process from the perspective of those being reviewed, and aims to identify the steps and decisions involved in a successful review, from preparation through to execution.

A. Identifying the Purposes of Reviews

In this section, you will learn about:

- Different types of Centre reviews
- Possible reasons for having reviews and considerations for each

The Introduction provided a definition of Centre reviews and the benefits of engaging in them, both of which contribute to our understanding of the overall purposes or reasons for having a review. However, additional drivers often exist that serve as a rationale for why a review is occurring at a specific time. To get the most from a Centre review, whichever type you are doing, you need to clarify why you are having one. In essence, you need to understand the underlying purpose or reason for having a review in order to determine everything else, from the questions you want to address to the process you will follow.

Types of Centre Reviews

A Centre review may involve:

- A self-study
- An internal review
- An external review
- A combination of the three

A self-study is normally initiated by the Centre itself, but it may involve a wide variety of stakeholders on campus and beyond. *Chapter III, Section E* of this Guide describes how to prepare a comprehensive self-study. The name self-study suggests an exercise of self-examination for formative evaluation purposes and quality enhancement. In that sense, a self-study suggests ownership by the Centre for the review and constitutes one type of review.

A self-study can be carried out, however, in preparation for a wider internal review, which includes review by a committee of your campus community members (e.g., faculty, staff, and/or students), or for an external review, which involves review by experts in the field from other institutions in Canada or beyond. Internal and external reviews may also be combined, either through the use of separate review committees (one internal and one external) or through a combined committee that includes both types of members. *Chapter III, Section F* of this Guide provides advice on selecting internal and external reviewers.

Ways to decide on the type of review that fits best with your situation include asking about standard practices (if there are any) at your institution and considering the main purpose(s) for your review.

Reasons for Reviews

The reasons behind the call for a review vary greatly. Reviews are sometimes launched from what might be called a position of strength and to ensure that the accomplishments of a Centre are made public. Reviews may also spring from compliance with internal regulations and various other predictable institutional routines. Still other reviews may be prompted by impending change, a felt need for change, or a certain malaise surrounding Centre performance and status. A wide variety of circumstances—individually or combined—can exist behind Centre reviews, with several being described in the rest of this section. We trust that you will find the reason(s) behind your review in this extensive list. *Table 2* summarizes the main motivators.

Table 2. Motivators for a Review

1. Mandated periodic review: By-law or regulation compliance
2. Initiated by the Centre
3. Determined by senior administration
4. Motivated by a need to study organizational structures and resource allocation
5. 'Opportune' time given departure of the director or other key figure
6. Related to institution-wide process involving all units
7. Centre questioned as incompetent or irrelevant
8. Budget review
9. Clarification of orientation to practice: Teaching, research, and service
10. Examination of essential purpose, goals, and mission

1. Mandated Periodic Review: By-Law or Regulation Compliance

In some instances, and in some institutional settings, your Centre may undertake, or be subject to, a mandated periodic review. In this case, there is a clear parallel between the customary academic program reviews and academic departmental reviews. Most academic program reviews are subject to provincial or regional guidelines, and in the case of professional faculties and programs, reviews are often mandated by provincial or federal professional bodies. In Canada, there are no jurisdictions in which reviews of teaching and learning Centres are mandated by external authorities, but some institutions have decided that the review process applies to all units.

Mandated periodic reviews would normally follow a predictable recurring schedule and, therefore, have the advantage of avoiding surprises and ad hoc decisions to call for a review. As such, mandated reviews normally allow you to properly prepare. They also have the potential advantage of lending credibility to the operation of your Centre in the eyes of the academic community, particularly if it is viewed as an administrative unit. That a Centre and its programs is involved in a periodic review conveys to the professoriate that the Centre is subject to the same scrutiny—and perhaps standards—as are the programs and activities of academic departments. The advantage of such a practice is to narrow the gap between academic departments and a so-called 'service' department (i.e., a Centre), thus reducing the possibility of the professoriate adopting a 'we-they' attitude. Such a divisive attitude can position a Centre as just another administrative unit that is peripheral to the 'real business' of the academy.

2. Initiated by the Centre

Your Centre may initiate a review for numerous reasons, including institutional opportunities, a need to control the timing, external contextual factors, or a desire to demonstrate a commitment to good practice and continuous improvement.

In some cases, the Centre's director, together with the staff, may take the initiative to call for a review as a means of gaining traction and favour in the institutional context, just as the members of a governing political party may decide to call an election because they are convinced that the process will result in a stronger mandate. In such a case, the Centre's leadership would be confident that an external review would highlight strengths and would afford the Centre acknowledgement for performance. This positive assessment, in turn, would consolidate the Centre's place in the institutional framework and put it in a stronger position to grow and flourish.

Your Centre might also call for a review as a pre-emptive action. It is sometimes wise and advantageous to choose your terms and timelines than to have these dictated by external forces. Senior administrators are extremely busy people and often devote their energies to priorities dictated by tight timelines and unexpected events with high stakes for the institution, so they may be pleased to accept the conditions and mandate of a Centre review as developed on a voluntary basis by members of the unit.

Another reason why your Centre may initiate a review is to demonstrate awareness of the need for accountability in higher education. Canadian post-secondary institutions have felt accountability pressures from governments and the general public. The vast majority of our institutions rely heavily on public funds, and both academic and non-academic administrators are focused on showing that their particular expenditures demonstrate productivity, innovation, and good stewardship. In this context, a Centre might initiate a review to secure its place within an institutional mission and strategic mandate, attempting to tie, as far as possible, its actions and accomplishments to the core business of the post-secondary sector.

Finally, your Centre might simply call for a review as a demonstration of good practice. Just as your team members suggest good professional practices, such as initiating formative student feedback on teaching in the middle of term and creating thoughtful teaching dossiers, a Centre might adopt a policy of periodic review in order to demonstrate consistency and coherence in both message and practice or to show a commitment to continuous improvement. In such a case, your Centre might adopt a policy whereby it commits to a periodic review (every five to seven years, for example) and outlines standard policies and practices to guide the conduct of such reviews. Academic programs are subject, in most jurisdictions, to an established review timetable and conditions, and a Centre can benefit from emulating these.

3. Determined by Senior Administration

Your Centre review may be determined by your senior administration, such as the provost or other administrator to whom your unit reports. While such a determination may involve dictated terms and conditions for the review, it might also lead to a constructive dialogue or negotiation of terms and conditions.

When an administrator requests a review, he or she may set the timelines and conditions, write the terms of reference, choose the reviewers, determine 'ownership' of the eventual reviewer report, and control the possible course of action subsequent to that report. However, your administrator may invite and welcome input from members of the Centre staff in setting the terms of reference and timelines as well as the guidelines for the reviewers and plans to respond to the review. This process can be very productive and collegial, as the administrator and your Centre's leadership jointly develop the details of the review that will be respected by all parties. Even when an administrator leads the review process, reviewers are likely to be chosen with input from Centre staff because of your expert knowledge of the top colleagues in your field.

4. Motivated by a Need to Study Organizational Structures and Resource Allocation

Centre reviews are sometimes linked to a perception that the unit's organizational chart or resource allocation requires examination. Such a review could be initiated by the administration, by the Centre, or arise from a mutually accepted idea that the review is necessary. While post-secondary academic structures and programs are often perceived as having very solid footings and are resistant to rapid change, our Centres have a history related more closely to service departments in the institution. A Centre does not usually have oversight from an academic senate as does an academic program and, therefore, may be more prone to restructuring and reorganization. Change can lead to a broader mandate with additional resources or a narrowing of focus and a loss of resources.

When structures or resources lie behind the review, the review's terms of reference and conditions would all be linked to the major reason for the review. Questions such as the deployment of human resources, the allocation of funds, and the reporting practices—top to bottom—would be central. The Centre's staff would have to be very transparent in providing access to their use of funds and the reviewers insightful in their review of budgets. Raising issues surrounding the sensitive matters of reporting practices, both internal to the Centre and between the Centre and the central administration, would be essential.

Finding the right match between the mandate of the Centre and available resources, both human and financial, would also be critical in such a review, as would a look at related departments and their current functions. In practice, Centre reviews also often examine the place of resources to support media and classroom technology, resources to support online, distance and open resources, and the potential of a learning commons or central resource for the promotion of innovation and effective pedagogy in higher education. The question of how best to 'situate' and support what has come to be known as educational development is central to such a review.

5. 'Opportune' Time Given Departure of the Director or Other Key Figure

Sometimes a Centre leader's departure provides an opportune time to take a fresh look at the mandate, activities, structures, and impact of the unit. Most Centres in Canadian universities have been established for no more than forty years, but some have a very brief history. Centres are often established as fairly modest entities, with a small staff and limited real estate on a campus. While the size of Centres varies from one campus to another, Centres generally cannot claim long-term stability and a rock-solid place in the established post-secondary culture. When a department head, dean, or vice-president academic leaves for a position elsewhere, a search for a replacement usually ensues as a matter of course. When a head of a Centre for teaching and learning leaves for another position, however, this sometimes provides an opportune moment for a Centre review.

A review under such circumstances might be regarded as a curse or a blessing. The review may be an opportunity to acknowledge the Centre's activities and impact to date and inform the incoming leader. When the departing head is generally regarded as a highly successful leader, the remaining staff may feel there is much to lose in a review and would prefer to simply get on with a search for a new leader of equal strength. To a senior administration unconvinced of the Centre's impact and the leadership of the head, the departure provides an ideal moment to undertake a review. For happy and productive Centre staff sorry to witness the departure of a strong leader, a review could be seen as a threat to a comfortable environment and meaningful work. However, disgruntled or undervalued staff may perceive a review as an opportunity for recognition and growth of the Centre.

If the Centre is to attract a new head, then the scope and mandate of the Centre, its past accomplishments, and its future opportunity for success are central to the review. Ironic as it may appear, the serendipity involved in a head's departure can prove to be an essential turning point in the evolution of a Centre.

6. Related to Institution-Wide Process Involving All Units

Centres are sometimes reviewed in the context of an institution-wide process designed to determine the value of each unit and the optimum resource allocation according to that value. If this is your situation, you need to conform to a set of imposed conditions for the review. This process can be long and very detailed and is sometimes seen as somewhat foreign to the way a Centre normally operates.

This process can also be stressful as it is seen as a high-stakes procedure: your unit's performance is held up to institutional scrutiny, and your resources hang in the balance. Although this kind of review is relatively uncommon in the Canadian context, it is known to require a great deal of energy from Centre staff and is not always welcomed despite the institutional logic of a more structured way of distributing resources. Once again, Centres involved in such reviews need to align, as much as possible, their internal priorities and resource allocation with the strategic mandates of their post-secondary institution.

7. Centre Questioned as Incompetent or Irrelevant

Times may occur in the history of your Centre when a review emerges due to a fundamental competency issue or perceived lack of relevance in the institutional setting. Sparked by a change in senior administration, an uprising by a teaching and learning committee, or a public outcry or event that caught the attention of the campus community or the media, a review in a crisis situation has critical ramifications. When a review is undertaken under such circumstances, all players should seek dependable and solid sources to frame the mandate, procedures, flow, and reach of the review.

Since some involved in the review may have an agenda with a preconceived outcome in mind, it becomes more important than ever to turn to available documentation and to plan the review on solid ground. From a positive viewpoint, a well-structured review can serve a very important service, either affirming that missteps occurred and identifying possible corrective action, or demonstrating that the Centre was on the right track and needs to be supported in moving forward. One way or the other, a review in these difficult circumstances may well be preferable to either ignoring a situation or allowing an arbitrary use of authority to make a heavy-handed decision without the benefit of close scrutiny.

8. Budget Review

On occasion, your Centre may be reviewed solely on the basis of a need for budgetary review. In such a case, the review would normally be determined by your senior administration and would involve a mandate focused on the use of financial resources. The review could measure the impact of the Centre's activity as compared to the results of other units across campus, however difficult a task.

A review based on budgets and, consequently, human resources, might also seek to compare Centre outcomes with those of comparable institutions in the region, if those data are available. For example, does your unit achieve a high rate of success, by various measures, with a budget far smaller than that of comparable units in the region? What resource input is appropriate if the goals of the Centre are to be achieved? Having budget records and time estimates for work done may be very useful for such reviews, although such data may not be immediately available.

9. Clarification of Orientation to Practice: Teaching, Research, and Service

An examination of the overall orientation—or balance in the orientation—of your Centre can be the motivation for a review. In this situation, questions may have arisen around the priorities of the Centre, the allocation of Centre resources, and workload descriptions and mandates of individual staff members. Alternatively, Centre staff or administrators may just want the orientation examined to assess fit with current practices in educational development.

A Centre's orientation may stem directly from its name. Many have names reflecting their purpose and include words such as *support* or *excellence* or *effectiveness* or even *research*. A review that seeks to clarify or shift a Centre's orientation would focus on examining the various facets of that orientation. For example, if a Centre was perceived to put too much or too little emphasis on the Scholarship of Teaching and Learning (SoTL), some review questions that may arise include:

- To what extent is the mandate of the Centre to lead faculty to a more scholarly approach to teaching?
- To what extent are Centre staff members meant to introduce faculty to the practice of the scholarship of teaching and learning (SoTL)?
- What is the appropriate balance regarding staff concentrating on their own SoTL projects as opposed to supporting faculty projects or working in concert with faculty on joint projects?

Beyond SoTL, other areas of focus when Centre orientation is being reviewed could be the type of teaching done by Centre staff and the time spent doing so, and the time and resources put into various types of programs and services (e.g., support for departmental curriculum review and change, the balance of central versus department-specific programs, the use of learning technologies in Centre programs, input into classroom space planning, the focus on learning outcomes and assessment practices, support for expert and peer observation of teaching and teaching dossier development, or membership on various institutional committees).

The work of Centres only seems to be expanding, so having an opportunity to analyze and get feedback on the current balance amongst different types of activities is important.

10. Examination of Essential Purpose, Goals, and Mission

Times may arise when your Centre needs to re-examine the essential purpose, mission, and major goals. When we are busy with our day-to-day responsibilities, it can be challenging to allocate time to more strategic-level work. In addition, post-secondary institutions typically adopt multi-year plans to pursue their fundamental missions. While some aspects of the institutional mission remain constant, new directions and strategic mandates emerge every few years. How does a Centre align with the declared direction of the institution?

Periodic review of a Centre's purpose, goals, and mission is advisable, so that the Centre's direction can be aligned with the overall thrust of the institution. Such a review may focus on identifying existing programs or services that can be stopped to make room for new areas that will support your institution's new directions. When multiple educational development units emerge within one institution, the central unit may become more effective if it pivots its approach and functions more as a hub that supports the various spokes. In this kind of complex context, reviewing and rethinking a Centre's purpose, goals, and mission are helpful.

Understanding the reasons for your Centre's review is a critical first step to a successful review process and positions you well for the next step of digging deeper into the context surrounding the review.

B. Understanding the Context

In this section, you will learn about:

- Expectations for the review to clarify early in the process
- Contextual factors that can affect your review

Beyond understanding the reason(s) for undergoing a review—as described in *Chapter III, Section A*— you also need to clarify expectations surrounding the review and carefully consider the effects of context in your Centre, your institution, and beyond. Such consideration early in the process may preempt challenges and positively contribute to the review.

Clarifying Expectations for Your Review

Regardless of the reasons behind your review, you need clarity about the details. First is to clarify who 'owns' the review process. When a Centre initiates the review, they are generally the drivers and determine the process. However, more frequently, reviews may be requested by the Centre or initiated by your senior administration, such as the provost or other administrator. In these cases, the level of involvement by the Centre may vary. The senior administrator overseeing the review may accept a great deal of input from the Centre's director and participate in an ongoing negotiation throughout the process. However, the Centre's staff and stakeholders still need to remember that it is the senior administrator's review and that this person will have the final say on all key elements (e.g., terms of reference questions, reviewers, report elements, and access to reports).

Next is scope and potential impact. Some reviews aim to entirely rethink or reshape the nature and function of the Centre or even bring up for debate the Centre's very existence. In other instances, a review may occur after a new director has been hired or after a leadership review has occurred. In these cases, the review is an opportunity to engage the Centre and your institution's community in contributing to plans for the Centre. Knowing the expected scope for the review can help frame the terms of reference, involvement in the self-study, stakeholders to be consulted, data required, and the reviewers' focus. As such, the scope is best decided at the outset. Additionally, expectations around stakeholder engagement are set early on as well to prevent misconceptions or tensions that may impact future engagement within the Centre, between the Centre and other units, and between the Centre and senior administration.

Another expectation to clarify involves contributions and access to the review documents. Ideally, decisions are made early on about who will be able to contribute to the self-study document, the reviewers' report, and the response to the report (if one is required) as well as who will have access to these documents. For example, do all Centre staff have access and contribute, or just a subset? What combination will make for an efficient yet transparent process? Considerations about access to reports also includes the purpose, impact, and perceptions of making them available. Would sharing the internal committee's report with the external committee (and vice-versa) benefit the review? What are the reporting practices for other reviews at your institution? While making reports available to stakeholders may be ideal for transparency, certain information within the reports may not be appropriate for particular audiences (e.g., staff restructuring). Furthermore, if Centre staff only receive highlights and directions from the reviewers' report rather than the full report, be prepared to work with staff member uncertainty, fear, and distrust. In any case, ongoing communication and not over-promising are critical. If access is undetermined at the start of the review, be as upfront as possible later about the reasons behind decisions regarding access.

Finally, consider what will happen post-review and seek to clarify those expectations. Do you need to prepare a formal response to your review? Or book a meeting with the owner of the process? What will the next steps be and how quickly do they need to occur?

When you know the expectations for your review, you can be upfront with your Centre staff as early as possible in the process, which may help to manage their expectations and anxiety and encourage their engagement in the review.

Considering Contextual Factors That Can Affect Your Review

Expectations are important to clarify, but your review is occurring in a real-world context that is complex and not always clear to interpret. We have identified a number of factors that you need to think about in relation to your Centre's review. *Table 3* provides an overview of the factors described in this section.

Table 3. Contextual Factors that Can Affect Your Review

Within Your Centre
• Staff Members' Responses to Being Reviewed
• Potential for Bias
Within Your Institution
• Goals and Motives
• Timing of the Review
• Institutional Context
Beyond Your Institution
• Provincial or National Priorities

Factors Within Your Centre

1. **Staff Members' Responses to Being Reviewed**. If your Centre is undergoing a review from a position of strength with a purpose of continuous improvement and evolution, Centre staff may be feeling very positive about the review and be keen to contribute. However, if your Centre review is part of a change initiative, the roles that your Centre plays in the institution may be redefined, organizational structures and reporting lines changed, and resources reallocated. A Centre review under these circumstances may be intimidating for Centre staff since the review is likely to address the unit's fit and purpose within the organization. In this type of situation, attention to change management and involving an external coach may aid the review process and the Centre's staff.

   As well, remember to communicate clearly and provide rationales to help alleviate stress and provide transparency. Ensure that messaging is consistent within the Centre and between the Centre's leadership and senior administration before, during, and after the review process to alleviate staff confusion or possible distrust. You may also be able to involve others such as senior administration, deans, and unit heads in communicating about your review and inviting others to participate. Overall, it is easy for those closely involved with the review process to forget that others, especially Centre staff, may feel anxious if they remain uninformed for long periods of time.

2. **Potential for Bias**. Given the potential high stakes of a Centre review, it is natural to want to highlight the strengths and downplay areas for improvement. Also, since some staff may feel threatened by the review, they may have personal agendas at play that can bias the kinds of information shared or how it is interpreted. These potential contextual factors make it important to ensure that a more balanced approach is taken. For example, be sure that many voices and ideas are brought forward in the review process, not just those consistent with the ones leading the process. As well, aim to incorporate information from multiple stakeholders (such as partners), rather than focusing solely

on self-reflection and the Centre's interpretation of work with stakeholders. Similarly, ensure that your data analyses are balanced rather than employing selective interpretation to align with one individual's perceptions or goals.

Factors Within Your Institution

1. **Goals and Motives**. Various stakeholders may have both explicit and unspoken goals for the review. Depending on the political climate within the institution, there may be differences between the stated goals of the Centre, administration's intentions, and stakeholder groups' expectations. As well, are there ulterior motives by participants? Are other units hoping to take over any of your resources? Anticipating such challenges may help to identify and deal with actions that risk derailing aspects of the review. Such issues might be mitigated by involving multiple roles and perspectives in the review process.

2. **Timing of the Review**. Consider the timing of phases in the review process and the involvement of stakeholders at your institution. For example, note the 'busy' periods for faculty and instructors and avoid requesting survey data or participation in focus groups during peak periods like midterms and finals or contacting administration when budgets are due. Summer semester may result in poor turnout for site-visit meetings with reviewers, but may be appropriate for collecting data from staff or partners, or for writing the self-study.

3. **Institutional Context**. When a review is completed during a change in senior leadership, the outcomes of the review may be uncertain since possible directions for the Centre may be unknown. In this case, seek an official commitment from the institution that the Centre can build on the review within a specific timeframe so the results do not get lost. This commitment gives stakeholders a sense of continuity and provides credibility to the review process subsequent to the considerable investment of time required to complete a review.

Factors Beyond Your Institution

1. **Provincial or National Priorities**. Our institutions exist in a larger political context. Are there external factors, such as government-driven priorities, that the reviewers and self-study need to consider so that your Centre is prepared to meet such external demands or directions at your institution? For example, in Ontario, universities have a quality assurance process in place for degree programs. Some Centres (e.g., York University) have chosen to mirror this process in their review, in part to provide rigour to the review and in part to enable educational developers to experience the process first-hand. This latter reason is helpful when developers subsequently support faculty in their own review process—the understanding of the process comes from lived experience.

The expectations surrounding your review benefit from up-front thinking and clarity, while the various contextual factors that undoubtedly exist are critical to consider and address. Attending to both expectations and context will help with your decisions about who to engage in your review and when.

C. Deciding on the Process of Engagement

In this section, you will learn about:

- The value of engagement
- Strategies for who to engage, when, and how

As discussed in the two previous sections, the owner and purpose of a review may vary. Regardless, a review may be expected to yield rich and useful results, particularly when multiple voices are considered. As such, careful consideration of the process of engagement is recommended.

The Advantages of Engagement

The engagement process includes, where possible, both actual stakeholders of the Centre as well as potential ones (i.e., non-clients) to provide valuable insights. While broader participation by stakeholders in a review may take more time and resources than a narrow group of participants, the advantages include:

- Enabling participants to pause, reflect, and recognize accomplishments and challenges
- Ensuring multiple perspectives and experiences
- Acknowledging the complexity, range, and depth of a Centre's work
- Increasing transparency to the community
- Increasing buy-in to the review process and future plans

Reviews that maximize engagement promote feelings of inclusion, contribution, and even ownership. For reviews that have limited input, such as select groups or individuals rather than the broader community, consider the potential impact and perceptions of exclusion that may result. What communications need to be in place to explain the reasoning? Overall, cast as wide a net as you can to give you many perspectives on which to critically reflect.

Who to Engage?

The question of who to engage in the review process may be answered through multiple inputs: Who can help to answer the questions in the terms of reference for the review? These people may be internal or external to your Centre or your institution, or consist of specific roles (deans, associate deans) or groups (faculty, sessional instructors, educational developers, staff from partner units, and students). Also, does an already-established review process or policy require you to include specific stakeholders? Given the purpose of your review and the questions you and your institutional leader want answered, who can provide the necessary information or experiences?

Once you have listed possible roles and groups, think about all the people and groups your Centre has a relationship with and jot them down. Considering the scope of your review, which of these stakeholders needs to be included in your engagement plan? You might limit the number by selecting representatives of certain groups, or individuals who have had substantial involvement with the Centre. Communicate the timeline assigned to ensure that all stakeholders invited to contribute to the self-study or the site visit can determine their availability for being involved. Draft focused questions to obtain and parse the information you need from them.

If you intend to analyze how you work with other groups in your self-study, remember to include their input in the self-study! Let reviewers read about others' experiences in their own words, not just hear from them briefly at a site-visit meeting.

Invitations to participate in your Centre's review (e.g., the data-gathering, the site visit) also recognize the importance of the invitees' experience and input and make them part of the Centre's evolution. Overall, think broadly and be as inclusive as you can. This engagement may help to enhance existing relationships with others and even create new ones.

Staff Engagement

The extent to which Centre staff are involved in the review process may vary greatly given the amount of time and resources needed and the fact that not all staff may be keen on participating in the process. In some cases, positive encouragement and a sense of contributing to the Centre's future may re-engage disengaged staff. Meanwhile, a self-study written solely by senior management, and only seeking feedback from staff on drafts, may result in low staff buy-in to the process and reluctance to provide honest feedback and further engagement at later stages in the process. Conversely, in some cases, staff might be quite happy to just give feedback on a draft due to time constraints or a high level of trust, so knowing your staff and checking in are important.

You may also want to consider a team model for your review. This strategy approaches the review as a project that includes a core team with allocated time and resources to execute the process (which may or may not be led by the director), and is accountable to an executive (e.g., the director). The core team is responsible for planning, coordinating, enacting, communicating, and seeking input. If you can include a student research assistant on the team, you will not only gain a student's perspective but also engage a student in an education-related study. Other members of the core team may include staff with the following skills: research and analysis, communications, project management, survey or question development, facilitation, and report-writing.

Possible key activities of a core team, over several months, include:

- Draft the review process and timeline
- Draft the terms of reference*
- Identify stakeholders and groups to be involved*
- Create survey items or focus group questions for self-study data collection
- Liaise with and elicit input from staff, team-leads, and other participants (e.g., advisory committee)
- Compile and analyze the data
- Draft the self-study report
- Draft the site-visit schedule*
- Draft the response to the reviewers' report (if one is required)

The review team members need clarity about their functions and a full appreciation of their important role in representing the Centre. They also need to remember that they are serving as planners, coordinators, and communicators on behalf of the whole Centre, not just for their role or functional area. Given the sensitivities around the self-study, periodic check-ins between review team members and members of the Centre's sub-units or teams can help to alleviate misconceptions or feelings of marginalization.

Ideally, all members of the Centre will feel like they 'own' the self-study and agree that their work has been fairly and accurately represented.

* with the senior administrator's office

Advisory Committee Engagement

An advisory committee with representation from other stakeholder groups may provide a sounding board throughout the review planning and engagement process. In a small number of meetings, the group can work through the various decisions in preparing the self-study and planning for the site visit. The University of Waterloo adopted an advisory committee model, which included two faculty members, two staff directors of other units, and four Centre review team members (including the director). Over six meetings, the group provided input on draft documents, such as the terms of reference questions, and data collection tools and approaches (e.g., faculty needs survey, interview questions to solicit feedback from partner units). Committee members external to the Centre also collected and analyzed some data for the Centre, serving as arm's length researchers. An advisory committee may also include the person responsible for reviews at your institution, if applicable.

Partner Engagement

Your partners are also critical to involve in your review. They may be deans, faculty teaching fellows, other units that you work with frequently, or frequent clients of the Centre. They are the ones to whom you naturally go for advice and input on your Centre's work. For a review, you can seek help from your partners to encourage campus engagement more broadly. For example, faculty partners can promote the completion of needs assessment surveys or share invitations to open meetings (if you have any), while heads of partner units can encourage participation from any of their staff whom you have included in data collection plans or a site-visit meeting. For the review, you are inviting people to help you: you may need some help to generate the kind of engagement you desire.

Engagement During the Review

One key time for engagement is during the preparation for the self-study. Details about the self-study appear in *Chapter III, Section E*. To prepare the self-study, you need data. Your Centre likely collects some forms of data already, but the terms of reference questions may surface new areas for you to investigate which will require stakeholder engagement. Seek to identify how you will collect what you need from your stakeholders. *Table 4* provides possible data collection sources and methods for various purposes.

Table 4. Data Collection from Stakeholders

Group	Purpose	Method
All staff	Work environment, impact of specific activities, Centre as a whole	Survey
Staff teams/units	Insight from specific staff groups	Strengths, Weaknesses, Opportunities, Threats (SWOT) analysis
Partners: Co-facilitators/faculty fellows/ associates, internal and external units	Relationship and perceived impact of collaboration	Survey, focus groups, interview
Client Groups: Faculty, instructors, sessional instructors, librarians, other staff, post-doctoral fellows, undergraduate and graduate students	Meeting their needs	Evaluation data, needs assessment survey
Other centres/educational development community	Reputational data	Survey

When planning focus groups, interviews, and surveys in preparation for the self-study, ask only the questions that provide you with the data you need. Also, be aware of leading or unclear questions. If possible, run draft questions by representatives of your stakeholder groups, or your advisory committee if you have one. Keep in mind the amount of time a survey takes and consider using incentives, if allowed at your institution (e.g., draw to a regional conference, iPad, or food at focus groups). Finally, carefully consider if you have time to analyze the results properly. Use your time—and your stakeholders' time—wisely.

Another significant time for engagement in your review process is during the site visit. See *Chapter III, Section G* for details about the site visit. Think carefully about who to include and how you will help them prepare. The reviewers' site visit is an opportunity to:

- Acquire more data from gaps identified during the self-study or from groups of stakeholders who are more difficult to access (e.g., senior leaders, non-clients of the Centre)
- Further engage stakeholders and potential Centre clients
- Gain a deeper understanding of information gathered to date

What materials, if any, can you share with site-visit participants before the actual event to help them be fully informed? For example, can you share your self-study? Alternatively, you may prefer to just provide them with broad questions to consider, asking for their perceptions without seeing how you have analyzed your work.

To encourage honest and candid input, clarify in your invitation that participants' comments will be anonymized or summarized, and ask your reviewers to convey or reinforce this message.

Engagement continues even after the site visit. Participants in the review process have taken the time and care to provide input and to aid the Centre with its future planning. Sending them a thank-you for participating and a summary of highlights or future directions (or the full response report, if appropriate) recognizes the important contribution people have made and informs them of your next steps. If possible, post a public document outlining key findings and next steps for the Centre to help alleviate anxiety and rumours, provide closure to the process, and invite contributors to continue to work with the Centre on its future directions.

You may also need to work directly with others in response to your reviewers' recommendations. For example, you may need to clarify the scope of responsibilities between your unit and another one, and so the engagement continues. A review opens the door for new and different conversations: embrace the possibilities!

With the context analyzed, you are ready for the next step: preparing the terms of reference document.

D. Setting the Terms of Reference

In this section, you will learn about:

- The purpose and contents of the terms of reference document
- Specific considerations for the terms of reference questions

Terms of Reference Purpose and Contents

The terms of reference document is like a contract: it outlines in one to two pages the task that reviewers are asked to complete. It is typically provided to the reviewers by whomever is overseeing the review, which may be the position to whom the Centre reports or a staff member who has oversight for unit reviews at your institution.

This document is of critical importance to both the external reviewers as well as the Centre's staff member(s) involved in writing the self-study because it helps to guide the work of both, although in different ways. The reviewers need to address the terms of reference questions in their report (or other form of reporting), and the Centre staff need to provide information in the self-study document and via the site-visit interviews to ensure that the reviewers can fulfill their task.

In *Chapter III, Section A*, you read about possible reasons for reviewing a Centre. Your institution may have a common purpose for doing reviews of academic units (e.g., continuous improvement), or there may be a specific reason for reviewing your Centre at this time (e.g., the director is leaving). The purpose(s) for your review is important to articulate in the terms of reference both for authors of self-studies and for the reviewers so everyone involved has clarity about why the review is occurring.

Besides clarifying the rationale for the review, the terms of reference document also includes specific questions for the reviewers to address. More details about these questions are outlined later in this section. The terms of reference document may also include administrative details such as:

- The site visit date
- Reviewers' names and affiliations
- Expected timeframe for reviewers to receive the self-study
- The reviewer report deadline and terms for distribution (from limited circulation to full public access)
- Information about the honorarium for reviewers (often around $1,000 Canadian)
- Any requirements surrounding issues of confidentiality

If these details do not appear in this document, they may be addressed in a separate formal invitation to your reviewers.

In addition, the terms of reference clarifies that, "you are seeking a final report that uses the reviewers' interpretive lens and expert judgment about quality and impact, not a descriptive report" (Malenfant & Deiss, 2015, p.142). An example terms of reference document appears in *Appendix A*.

Terms of Reference Questions

Much like research questions for a research project, the terms of reference questions are a key driver behind the self-study and the review overall. Anyone drafting these questions is encouraged to spend adequate time on this task since the questions will help to determine what you need to include and explore in your self-study. They will also help the reviewers to identify what information they need to collect during the site visit or from additional documents so they can prepare their resulting report.

The process of developing these questions is also important to consider. In some cases, the senior administrator overseeing the Centre may draft the questions, but ideally the Centre director and/or other Centre staff members can work collaboratively with the senior administrator to help create a sense of agency and buy-in regarding the questions. You may also want to circulate these questions to key stakeholders (e.g., deans, teaching fellows) for feedback, both as a means of making them aware of the review and giving them an opportunity to contribute to the development of the questions so that they feel some investment when you later ask them to participate in the site visit.

Reviewers cannot delve into every aspect of a Centre's work, so the terms of reference questions serve as spotlights on key areas for comment and feedback. What is most important for you to critically analyze about the work of your unit? What do you most want to learn from your reviewers?

Typical terms of reference questions may probe the following types of topics or issues:

- The Centre's identity statements (e.g., vision, mission, mandate) and orientation (e.g., service, research, teaching) in relation to the institution's mission and strategic directions
- The Centre's programs and services (e.g., type, level of centralization)
- Resource allocation (e.g., budget, staffing, space)
- Organizational structure
- Staff retention and succession planning
- Relationships and fit with partner units
- Current issues and future directions or priorities for the Centre, given the institutional and higher education contexts
- Comparison to peer units at similar institutions

Encourage reviewers to also address any additional topics that are relevant from their expert perspective.

Reviewers may be asked to comment on the *appropriateness*, *effectiveness*, or *quality* of these various terms of reference question topics.

Keep in mind that some questions can be challenging for reviewers to address, such as comparison to peer units or specific budgetary information that may be very context-specific. Unless you are confident that reviewers can locate Centre benchmarking data from professional associations (e.g., Educational Developers Caucus in Canada, the Professional and Organizational Development Network in the United States, or the Council of Australian Directors of Academic Development) or other empirical sources, aim to include some data in your self-study to help your reviewers respond to such a question. For example, the Centre for Teaching Excellence (CTE) at the University of Waterloo developed and distributed a reputation survey, which was sent to Centre directors at all Canadian universities to provide data about the work of that Centre from the perception of colleagues at peer organizations. Professional associations could greatly assist Centres with external reviews by collecting and publishing benchmarking data, which may be distilled from self-studies or annual reports.

Sample Terms of Reference Questions

The terms of reference questions are a critical part of the self-study process, and may become the organizing framework for the reviewers' report. Overall, the effort put into this part of the review process is time well spent. *Table 5* provides two sets of terms of reference questions as examples.

Table 5. Sample Terms of Reference Questions

Example 1 1. In light of its mission, what are CTE's strengths and weaknesses? In the short term, what specific opportunities and challenges should CTE be aware of? 2. How well do CTE's resources, organizational structure, and internal processes support its work? Does CTE have the necessary human and capital resources to meet its stated mission? 3. How well aligned are CTE's collaborative relationships with its mission? How well does CTE build or maintain relationships with its stakeholders, particularly its partners and collaborators? What relationships need to be strengthened, reassessed, or clarified? 4. Are the metrics used by CTE sufficiently sensitive and meaningful to provide evidence of the true impact of its work? 5. How does CTE compare to peer units at other institutions? 6. How should CTE be different in 5 years? 10 years? What should be given less or more focus? (Centre for Teaching Excellence (CTE), University of Waterloo)
Example 2 1. Does the Centre have a clearly defined mandate, together with a viable and relevant strategic plan? 2. Does the Centre provide the appropriate kind of services and good quality services to its stakeholders? 3. Does the Centre partner effectively with other units and governance bodies that support the institution's learning environment? 4. Are there emergent areas in teaching and learning that should be pursued, given the current state of educational development in Canada and beyond? Are there any areas of activity that should receive less attention in future? 5. Are the resources available to the Centre appropriately allocated, in view of the strategic priorities of the unit? 6. In view of the fact that we are currently recruiting a new director, what are the priorities for the next director of the Centre? (Teaching & Learning Centre, Simon Fraser University)

The terms of reference questions need to be focused and limited in number, but remember their critical importance to the whole review process, especially in the development of your self-study.

E. Writing the Self-Study

In this section, you will learn about:

- What self-studies are and considerations regarding audience and purpose
- The common components of a self-study
- What to include and exclude from the document
- Guidance for the writing process

Defining Self-Studies

A self-study is a written report that captures the story of your Centre. You may be constrained as to what you can include and which headings to use, or you may have complete freedom in its design. Either way, the self-study goes far beyond description and also includes evaluative commentary based on your analysis of the data you collect and your extensive knowledge of your Centre and institution. In addition, like a CV or a brochure serves to represent a person or a company, the self-study can set the scene for the reviewers, creating a first impression that may impact on the site visit and even on the review itself.

Audience

Who are you writing this document for and why? The reviewers are the obvious and primary target, but the self-study could also have an internal and external audience now or in the future, including yourself or your successors. The internal audience likely includes senior administrators such as the provost and deans, as well as faculty members and teaching assistants who may be curious as to what the Centre does. The staff in your Centre will also likely be interested in reading the self-study. The external audience could be one that you seek, if you choose to publish the self-study or share in other ways. The Centre may be a point of pride for your institution, with this self-study enabling staff at other Centres to learn about your approach to your work and its results.

Purpose

The purpose and aims of Centre reviews is covered in more detail earlier in this Guide, but briefly the purpose of the self-study is three-fold. It enables you to:

- Tell your story – the context and history of your Centre
- Highlight your achievements – share the things you are proud of and the impact of your work
- Identify areas where you would welcome critical feedback (e.g., a lack of resources or struggles to engage with faculty) – think about the issues on which you would most like input and provide your own critical analyses to give your readers a solid starting point.

Content

The precise content of the self-study may be restricted if you are following an institutionally determined process, or you may be free to choose. The following categories, summarized in *Table 6*, may not all apply in your context. The precise order of the sections may also vary from one self-study to another. The suggested order reflects the chronology of our work. Use another order if it makes more sense in your context. As discussed in *Chapter III, Section C* the self-study may involve many stakeholders, some of whom may be able to assist in writing parts of the document as well as contributing to its content. Remember, though, that a tension exists between wishing to include all relevant material and showing respect for the reviewers' time. Material that may be helpful but is not essential can be put into an appendix. With your readers in mind, aim to keep the body of the self-study as concise as possible while still providing sufficient detail to share the story of your Centre and the analysis of your work.

Table 6. Self-Study Content Sections

1. Introduction
2. Executive Summary
3. Process for Completing the Self-Study
4. Centre Context
5. History and Description of the Centre
6. Planning Your Work
7. Doing Your Work
8. Assessing Your Work
9. Resources
10. Key Accomplishments
11. Looking Forward
12. Conclusion
13. Appendices

1. Introduction

The introduction to your self-study is likely to be the starting point for the reviewers. Ask yourself what would be helpful to know if you were reviewing a Centre. The reviewers will likely be familiar with your educational development work in general terms, but it may be that others who read this document will be less clear. Begin the introduction with confidence, optimism, and an awareness that it may be necessary to make the implicit explicit. Do not assume that all reviewers will be familiar with the intent of this particular review, will know the history and context of this particular Centre, or will appreciate the nuances and politics in your particular institution. On the other hand, do not be overly defensive or wordy. This can be a difficult balance to strike.

Tell your readers the reason for the review. For example, is this a standard periodic review that has occurred many times, or is this a new activity? Are you seeking to address a key concern, or have a specific focus for the review? Orient your readers so they are aware of the expected audience for the self-study: are they the only ones, or might there be multiple audiences?

The introduction may also be the ideal place to state the terms of reference questions for the review. These questions can help to focus readers on the purpose both of the self-study and the process itself.

2. Executive Summary

This section is usually written last, but appears near the beginning of the self-study. For some readers, it will not only be the first part they read: it may be the only part. Summarize the key issues highlighted in the rest of the self-study. Be succinct while ensuring you capture the flavour of the review. You may decide to present the executive summary before the introduction, but either order is acceptable.

3. Process for Completing the Self-Study

The self-study is a report that describes the Centre, but it is also a form of research. The reviewers will be interested in the process you followed that led to this report. Consider providing information that addresses these types of prompts:

1. What is the rationale for the review – or in research terms, what were the research questions?
2. How did you go about collecting information that appears in the pages of your self-study?
3. If you have existing processes for collecting, storing, and analyzing feedback on the Centre's activities, what are these? Do you, for example, ask participants to complete evaluation forms after every event

(see point 8 on assessing your work, below)? Perhaps you organized an institution-wide survey to garner perceptions about the Centre specifically for this review. If so, what were the questions, how did you distribute the survey, and what was the process for analyzing the results?

4. As discussed in *Chapter III, Section C*, did you seek to speak to a range of stakeholders, such as contract faculty, graduate students, tenure-stream faculty, senior administrators, staff groups, and partners? If so, who were they and how did you contact them?

At this stage, you are not reporting on the findings, rather the methods used to gather data. This description will enable your readers to judge whether the data collection process was sufficiently widespread and detailed to give a fair picture on which to base the review.

4. Centre Context

You will elaborate on the history of the Centre later. Here, you continue to orient your readers to appreciate the context in which you operate—both internal and external context—and the key challenges that you face.

Internal Context. Tell the readers about your institution, how large it is, the number of students (undergraduate and graduate), disciplines represented, number of faculty, proportion that are contract, and any other key issues. Explain how the Centre fits into the structure of the institution (e.g., whether the Centre is part of the Library, or how it is aligned with Instructional Technologies).

External Context. What are the key issues from a provincial, national, or international perspective? For example, in Ontario, institutions are required to adhere to guidelines regarding program review and development. If you are expected to support this activity, changes at a government level may affect the operation of the Centre. Meanwhile British Columbia lacks provincial guidelines; hence, some institutions have elected to pursue accreditation through the Northwest Commission on Colleges and Universities (NWCCU), which affects the work required of Centres there.

Challenges. Without being overly negative, describe the key challenges facing the Centre. You will elaborate on your achievements later: here you are alerting your readers to the issues that keep you awake at night.

5. History and Description of the Centre

Keeping in mind the desire to be succinct and yet informative, briefly describe your Centre. This is likely to include a history of its development. You may wish to include details such as when the Centre opened, the number of people employed, and their roles. Describe partnerships that you have developed, perhaps with service providers such as Writing Centres, Career Centres, Instructional Technologies, and Libraries, as well as with Faculties or key individual faculty members and students. Highlight any key changes in partnerships over time if that seems relevant to your Centre's story. You may be tempted to include hyperlinks to all of these partner units in your self-study, but keep in mind that endless links can disturb the flow of the report for your readers and may not explain nuances or the key areas of intersection with these other units. Help your readers by explaining relevant details.

Also provide the vision, mission, and mandate statements for your Centre, if available, and how they connect to your institution's strategic plan. You may also want to provide any draft versions of these 'identity' statements if you are planning changes in the future and would like reviewer feedback.

If you do not already have an organizational chart, consider creating one. As with all maps, this type of visual may tell your readers a great deal about your perception of your world, particularly if you ask your team to create their own version. Dotted lines can be used to show relationships that are informal or temporary. The chart indicates the reporting structure, who reports to whom, and shows where responsibility lies in your organization.

Depending on your situation and the purpose of the review, this part of the self-study may be highly significant. For example, if you have faced a complicated, politically charged situation, such as a lack of institutional confidence in the Centre's value, it may be important for the reviewers to have a very clear understanding of the history of the Centre. On the other hand, if this is a relatively uncomplicated situation, then the history may be brief.

6. Planning Your Work

One key part of a Centre's work involves planning that work. When deciding to embark on a new venture, describe how you and your team determine the need. Outline the steps you take to decide if it is a wise use of resources to offer a workshop or hold a conference, for example. Do you have a strategic or operational plan that helps you to prioritize your work? If so, you may wish to include such documents in the appendices. If you use some other means to determine priority, explain what this is. When do you engage in planning? Is there a regular cycle to your work? In some Centres the work revolves around the academic year, starting in the summer with support for new faculty then following a typical instructor's calendar, with course planning events before the start of term and a focus on assignments later.

Help the reviewers to see that your work has a pattern, is intentional, and represents a good use of resources, as opposed to being haphazard, reactionary, and wasteful through repetition or inappropriate choices.

7. Doing Your Work

What exactly do you do? This is often a question most of us dread when asked by a friendly taxi driver, for example. Exactly how do you describe the multiple aspects of your work? One way is to categorize your activities. Each Centre has a different ethos, range of activities, or choice of resources, so adapt accordingly. These four categories are suggested as a starting point.

Workshops, Courses, and Events. Grouping activities into categories can help a reviewer to understand the scope of work conducted by the Centre, and what informs the choice of activities. Consider including a printed schedule or calendar of events as an appendix, particularly if you offer multiple events. Some Centres do not distinguish between workshops and courses, while others offer one-off workshops alongside structured programs or courses. Such structured programs may be accredited by organizations such as the Educational Developers Caucus (EDC) in Canada or the Staff and Educational Development Association (SEDA) in the UK.

Events can encompass annual or special celebrations, such as an annual teaching and learning conference, celebrations around teaching awards, or a focused event following a campaign to promote a key institutional priority. Check your calendar to be sure to include all the events that you organize or host. In a busy Centre, it can be easy to overlook one.

Be clear in the description of the events if some of them are aimed at a particular group, such as contract faculty or graduate students. Be equally clear if the workshops, courses, or events focus on specific themes such as eLearning or experiential education. These details help the reviewers understand the structure of the programming in addition to the content.

Consultations with Individuals and Groups. In some Centres, consultations account for a large proportion of developers' time, while in others they are less dominant. Describe the types of consultations provided. Are consultations offered on a drop-in basis determined by faculty members or graduate students, or is there a booking process? Do you offer teaching observations and, if so, how formal are these? Does the observer provide a report; if so, how are such reports used? Do you provide support for academic program reviews? In Ontario, for example, such reviews are a provincial requirement, so Centres there are likely to be involved in supporting program teams and are more likely to mention this in their self-study than Centres in a province that does not have this requirement.

Research and Scholarly Activity. Does your Centre support research into teaching and learning, often referred to as the Scholarship of Teaching and Learning (SoTL)? Do members of your Centre engage in SoTL themselves? In either case, describe SoTL-related activity. An increasing number of Centres create an annual CV for the Centre where they record all the scholarly activities of the director, educational developers, and any others associated with the Centre. The CV is likely to include presentations at conferences, peer-reviewed publications (e.g., articles, chapters and books, reports, and research projects, particularly where grants have been awarded), and service work for professional associations. If the CV already exists, it can be included as an appendix to the self-study with a summary of activity provided in the body of the document.

Stewardship. Is your Centre a key facilitator in fostering community among your institutions' educators, contributing to the showcasing and celebration of their experiences internally and externally, and connecting them across the disciplines? Does your Centre assist with applications for teaching awards? Do members of your Centre engage in community service and committees? As some Centres are involved in shifting institutional cultures, related activities can also be included here.

8. Assessing Your Work

Explain how you evaluate the impact of your work. As we know, this is phenomenally difficult to do with accuracy, but it is often the first question that senior administrators ask: how do you know if you are making a difference?

Bamber (2013) sets out an 8-step process which may help you to evidence the value of your Centre and the work of you and your team.

While you are unlikely to include each step of Bamber's process in the self-study, you may find it helpful to work through them before summarizing your assessment results here. The headings below are Bamber's, while the comments provide an interpretation of each step. Other evaluation frameworks may also provide some guidance. For example, see Wright's (2011) question-based evaluation matrix model, or the work of Guskey (2002 and 2005), Chalmers (2015), and Chalmers and Gardiner (2015). For further discussion of Bamber's approach, see Bamber and Stefani (2016).

Consult the Evaluation Literature. Particularly if this is a new field for you, Bamber advises familiarizing yourself with the challenges faced in demonstrating impact in education in general, and in educational development in particular. As developers, we work with faculty and graduate students who in turn work with students. It is by no means a simple matter to show a direct connection between our work and improvements to student learning or the student experience. Condon et al. (2016) provide one longitudinal study that links educational development to student learning, but such work is rare, going beyond what most Centres aim (or have the resources) to assess.

Elucidate Your Theory of Change. Change is a complex subject, but existing theories may help to explain or predict behaviour. It is likely that your understanding of change, as articulated through a theory or theories, will influence your choice of action and the way in which you will assess the change. For example, if you believe change is evidenced through the language that instructors use to talk about their teaching, you are likely to focus on narrative or content analyses in your work and seek ways to measure or collect evidence regarding those changes. If you believe change is shown in a decrease in student attrition from first-year courses, then you are likely to put emphasis on sharing practices that are thought to aid retention, and you will pay close attention to data around student numbers.

Plan Your Evaluation. Long before you begin to write a self-study, you are well-advised to plan the evaluation process, similar to Hines' (2017a, 2017b) models discussed in *Chapter II*. Consider what data you wish to gather, when is the best time to collect the data, and in what format. Decide if you need to gather data about every event or just a sample. Also determine who will be responsible for this data collection and by what deadlines.

Choose an Evidence Mix. Gather evidence from a range of sources, and aim to triangulate your data collection. If you wish to find out whether an instructor changed their behaviour as a result of attending a workshop, you could ask the instructor—both immediately after the event and then some time later—but you could also ask students in their class or their colleagues if they observed a change. See Bamber for examples of evidence grids which can be used to map the data to evaluate impact. Bamber emphasizes the relative value of different types of evidence, where impact on student learning is the strongest but hardest to obtain while participants' view of an event (a 'happy sheet') is the most common and easiest to collect, yet the weakest.

Take a Systematic Approach to a Non-Systematic Problem. While acknowledging the inherent messiness of educational development activities, Bamber encourages being systematic and methodical in planning our evaluation. Be sure to explain your assessment system or approach in your self-study.

Acknowledge Judgement and Subjectivity. Bamber counsels that "There is no such thing as value-free evidence or evaluation" (p. 41). In choosing which activities to evaluate, indeed which activities to include in the self-study, we are exercising choice. The audience, particularly the reviewers, will reach their own conclusions, but the fuller the information provided and the more transparent the process used to obtain it, the more likely they will arrive at a balanced interpretation.

Use Evidence to Make Your Case. Rather than just presenting the data and assuming the figures or words will speak for themselves, provide a narrative that explains the significance of the data. For example, rather than saying a particular number of faculty members attended a workshop, tell your readers what proportion of the total pool that represents or how the number has changed over time and why. Select appropriately to give a fair picture of your activity, but do not assume that your readers will understand the significance of the data without an explanation. The context of your Centre and institution are critical in determining these explanations.

Contribute to the Literature. While this step may not be part of the self-study, Bamber's encouragement to share your experience with our professional community is well made. Assessment of impact is widely agreed to be a gap in the educational development literature and an area where many developers struggle. Contributions at conferences and in print are sought after, so consider sharing.

9. Resources

Do you have the resources needed to do your work and to achieve the mission of your Centre? The self-study is a valuable opportunity to reflect on the level of support provided by your institution. Consider the financial resources (budget), staffing levels, and space.

Budgetary Control. Share with your readers the amount of control that the director has over the Centre's budget. Also describe the budgeting model that is used at your institution. In some cases, Centres are funded centrally with a protected budget. Others less fortunate may be subject to the whims of deans or others who contribute to the funding of the Centre. The review may be an opportunity to argue for stable or even increased funding, particularly if you can prove that existing funds are being used to great effect and can point to enhancements that would be possible with an increase. For example, does the Centre control funds for seed funding SoTL projects? If not, would this be a welcome innovation?

Staffing and Budget Levels. For staffing levels, present a case about whether or not the levels are appropriate for the size of the institution and the purview of the Centre. While there is a tendency to privacy over issues of finance, it can be extremely powerful to know how your Centre compares in terms of resources—including both budget and staffing levels—with Centres at similar institutions. A review can result in a reassessment of staffing and budget levels, but only if this is brought to the attention of the reviewers. Many ways exist to provide human resources: appointing full-time educational developers is just one solution. Faculty liaisons, teaching chairs, and other titles are used for adjunct assistance as well as paid or unpaid graduate or undergraduate students. Do not forget to include these people when describing the staffing levels in your Centre.

Location. In 2017, the Staff and Educational Development Association (SEDA) listserv was the site of a lengthy discussion among members around the location of Centres. Contributors shared horror stories of being positioned in places that faculty were least likely to visit or in uncomfortable, ill-equipped rooms. Others were more fortunate, able to describe well-appointed spaces with up-to-date, student-centred furniture in a central, easily-accessible location. The discussion centred around the impact of the location and set-up of a Centre on the work it is able to perform. Be sure to describe the physical environment of your office and workshop space, and point out any advantages or deficiencies that it presents. The reviewers will be able to see for themselves when they visit, but it is helpful to sow the seeds of any concerns or points of pride before then.

10. Key Accomplishments

What are you most proud about regarding the work of your Centre? This is not the time for false modesty. Be proud, be loud, and explain what you have done well and why it is special. If you are not sure, ask your team and colleagues. What do the people who are closest to your work value the most?

11. Looking Forward

The process of creating a self-study is by its nature reflective and backward-looking. However, the self-study is also an opportunity to look to the future. What are your plans for the next 5 to 10 years? Where do you see the greatest need for your work? Do you need to change foundational pieces like your Centre's vision, mission, or mandate, redirect your operational activities, or change your organizational structure to best position your Centre for success? Most, if not all, universities have an academic or strategic plan, or something similar. Once again, we recommend tying your vision to that of your institution. Show how your work is intrinsic to the institution's success. Make the case that without your Centre the plan will fall short! When looking to the future, avoid producing a 'laundry list' of nice-to-have items. Offer a compelling vision with the Centre, supporting and facilitating the success of the institution.

12. Conclusion

Many self-study reports end with a conclusion. There are not any new revelations here; instead, provide a summary of the key issues raised in the self-study. This is not the same as an executive summary. The difference is that a conclusion reminds readers (who have read the whole report) about the key issues, while an executive summary may well be the only section some people read. The executive summary is likely to be a longer document as it has to reprise the main issues, while the conclusion states the arrival point and not necessarily the route taken to get there. You may find that an executive summary can replace a conclusion if that is your preference.

13. Appendices

Appendix items provide further support or illustration of points made in the body of the report. In a digital age, it is all too easy to provide a seemingly never-ending file of appendices. While that is not desirable, the availability of online information may be used to your advantage. Keep in mind, though, that anything that is put into an appendix is by definition not vital to the report and may not be read. Also, be mindful that reviewers will not welcome endless links that disturb the flow of the report or may not be easily accessed while travelling to the site visit. Here are some suggested appendix materials you may wish to include:

- Timeline, growth, and development of the Centre – if appropriate to elaborate on the description in the report
- Centre offerings – workshops, courses, and events, possibly in the form of a calendar or schedule

- SWOT analysis (Strengths, Weaknesses, Opportunities, and Threats) – at the level of the Centre and/or sub-units
- Summary of the evaluation data – avoid including reams of raw data, but your readers may find it helpful to have more than is included in the body of the self-study when assessing the validity of your claims
- Evaluation questionnaires and surveys
- Descriptions of special projects, such as funded research projects or partnerships with others at your institution or elsewhere

Guidance for the Writing Process

A self-study is a substantive document that needs to represent the work of the whole Centre. Clearly understanding the purpose, audience(s), and relevant content for the self-study is critical. Given the comprehensive nature of this document, though, it is common to have multiple authors involved, which may be challenging. *Table 7* provides some tips to help with this type of writing process.

Table 7. Strategies for a Process Involving Multiple Authors

- **Determine clear expectations** about the self-study's content and format (e.g., purpose, length, level of detail, voice, level of subjectivity and inference to derive from data)
- **Ensure a balanced representation** of sub-units' accomplishments/activities
- **Have a main editor** for the self-study to give it a common voice and tone
- **Identify a final decision-maker** for the report rather than relying on consensus
- **Have a clear timeline** with milestones to ensure continuous progress and identify gap areas that need additional explanation, data, or analyses

Allow yourself plenty of time to prepare and write the self-study report. This is your chance to show your Centre in its best light, but also to draw attention to aspects that you would like the reviewers to investigate. The purpose of a review is not solely to promote your Centre; it is also a valuable development opportunity. Ask others to read the document, since as with any writing, different readers bring different insights: what seems clear and explicit to you may be confusing and opaque, especially to readers outside the Centre.

Sample self-study reports that have been made public can be found for the following institutions:

- **University of Waterloo**
- **University of British Columbia**
- **The Ohio State University**

See *Appendix B* for the website addresses.

With your self-study well underway, you need to turn your attention to selecting reviewers.

F. Selecting Reviewers

In this section, you will learn about:

- Who chooses reviewers, both internal and external
- Criteria to consider when choosing reviewers
- The roles of reviewers
- Strategies for engaging with reviewers

Selecting reviewers is arguably the most important step in the review process. The reviewers you choose, whether internal or external reviewers (or both) have the potential to significantly impact the decisions you make—or that others will make—about the directions, resources, and staffing of your Centre. Teaching Centres are unique units on any campus for their connections across and between academic and service units as well as their ever-increasing role in institutional priorities and work with senior leaders. Reviewers selected need, ideally, to be familiar not only with their own specific area in which they work but also to have an interest in and awareness of the broader developments, goals, and challenges within higher education.

Choose your reviewers wisely.

Who Chooses Reviewers

Ideally, reviewers are chosen in partnership between the appropriate senior administrator (e.g., provost or other administrator) and the Centre director, although at times the senior administrator will make this decision independently. However, while senior administrators may be able to make recommendations for internal reviewers, they may not be able to so easily identify external reviewers. Centre directors will be able to draw on their knowledge of the educational development community, nationally and internationally, to identify reviewers. It may also be the case that Centre staff and faculty may be able to make recommendations for appropriate reviewers.

Criteria for Selecting Reviewers

In selecting reviewers, the selector will need to consider many factors that are all important for the success of the review. For example, the purpose and goals of the review need to be finalized to ensure that the chosen reviewers make sense in those contexts. Reviewers will need to have the requisite knowledge, background, and interest to best serve the needs of your review.

You may want to consider any existing relationships between reviewers, or between staff in the Centre and reviewers, to determine if potential reviewers are too close to your Centre's work to provide a balanced perspective or if there are any potential conflicts of interest. In one of our cases, a senior administrator put in place an 'arm's length' rule for choosing external reviewers, where the recommended shortlist could not include someone with whom anyone in the Centre had collaborated in the past 4 to 5 years. In a large Centre, that could quickly disqualify a number of potential reviewers. In such cases, you might consider at least consulting with such colleagues for their reviewer recommendations even if they themselves may not be approached to be a reviewer.

In addition, select reviewers who can write clearly and succinctly to ensure clarity of recommendations. Finally, carefully consider your reviewers' availability. Choosing reviewers who are able to respond in a timely manner will be crucial to enabling the Centre to consider, discuss, and implement change as necessary. The checklist in *Table 8* summarizes important characteristics for reviewers.

Table 8. Checklist for Identifying Effective Reviewers

- ☐ Has requisite knowledge, background, and interest to understand your institution's context and the goals of the review
- ☐ Does not have existing relationships with Centre staff that may compromise objectivity
- ☐ Writes clearly and succinctly
- ☐ Can dedicate the time required to engage in the review process
- ☐ Complements the backgrounds of the other reviewer(s)
- ☐ Will provide honest, thoughtful, and critical insights into the work of your Centre
- ☐ Listens closely to a variety of stakeholders
- ☐ Asks clear, probing questions
- ☐ Can analyze and interpret often competing sources of input
- ☐ Will put the focus on the work of your Centre, not on what their Centre does well

Roles of Reviewers

Reviewers fill multiple roles: data collectors, data analysts, and interpreters of your Centre's work in order to provide recommendations. To fulfill these roles, they not only need to be knowledgeable and informed, but they also need to be open to considering the specific context of your Centre and have the ability to reflect on possibly competing viewpoints. As such, reviewers need to be autonomous and invited to give their own informed perspective. Reviewers meet with many different stakeholders, so they need to be good listeners and able to ask good questions. Working from the self-study, reviewers may be able to determine many questions in advance but also need to be able to follow additional or new lines of inquiry as they arise to fully understand and analyze the information that they are gathering. From our perspective, the role of a reviewer is also to help you work better in your context versus focusing on what they do well in their context—this is perhaps a subtle difference, but one that is critical to the success of the reviewers in obtaining useful input and feedback for their report. Additional considerations regarding internal and external reviewers follows. Specific guidance for reviewers appears in *Chapter IV*.

Internal Reviewers

Internal reviewers may be numerous and thus form a committee chaired by a faculty member or senior administrator to whom the Centre does not directly report. In the case of a committee, members are chosen to collectively represent a broad range of Faculties and disciplines, taking into consideration the perspectives of senior and junior faculty members, and ensuring representation of the kinds of faculty positions at your institutions, including, for example, full-time, limited-term and part-time faculty, research and teaching-stream faculty, and instructors.

The reviewers on an internal committee also often include non-academic staff from key units such as student services, libraries, and technology support units (where these latter are separate from the Centre). The input of non-academic staff is important for understanding the relationships and reach of the Centre and their multiple partnerships across campuses. Student representatives may also be included. Keeping in mind the diversities represented by the individuals selected is also important so that the experiences and needs of various diverse groups at your institution are taken into consideration.

If your internal review is structured so that one or two individuals are selected to consult with others and provide a summary and analysis of the feedback they receive, then careful consideration needs to be made to the relationship between the goals of the review and the individuals chosen to be reviewers. Such reviewers might be faculty members, staff, or a senior administrator, but they need to have a good working knowledge of the Centre while not actually being affiliated with the Centre. Again, much will depend on the purpose of the review.

Finally, internal reviewers may be part of a team that also includes external reviewers. In this case, the internal reviewer role can vary from full review team member to that of a 'sherpa' who provides insights into institutional context to help the external reviewers interpret the self-study and data from the site visit.

External Reviewers

External reviewers' qualifications include an understanding of the nature of educational development work and the work of Centres, and familiarity with the type of institution they are reviewing (e.g., research intensive, small liberal arts institution). For one of us, it was important that the reviewers had experience and understanding of the complexities of working in a large, research-intensive, decentralized university. Also, ideally, at least one reviewer has an understanding of the provincial requirements of the institution (e.g., for reviews in Ontario universities, the program review process and the need to have staff resources to assist with work such as curriculum mapping is important to recognize).

We recommend that you invite *two* external reviewers whom you believe, on the one hand, are generally aligned with your Centre's and your institution's values and philosophies, but on the other hand, are willing to provide honest, thoughtful, and critical insights that will assist you in shaping or re-shaping your Centre. More than two external reviewers can result in logistical challenges with respect to the timing of the review and report writing, and might also present challenges in establishing relationships, especially if the selected reviewers have not worked together before. However, two reviewers allow for the introduction of varying perspectives that will likely enrich the review report while easing logistical concerns.

Engaging with Reviewers

Once you have set a date for the site visit, reviewers can be invited. You need to choose a realistic date for the site visit, seeking to identify a deadline by which you can comfortably be done the self-study while giving the reviewers at least a month to read it.

Ideally the senior administrator leading the review process extends the formal invitation to potential reviewers, identifying the purpose of the review and the timelines for the process, including the site visit date(s) and the deadline for the final reviewer report. The ability of reviewers to commit to and adhere to the timeline is important, if not crucial, to the process. Delays in obtaining the report(s) can result in delays in implementing required changes or obtaining necessary funding and other resources. As part of the invitation, be sure it is clearly specified how the reviewers will be recognized for their work, such as by honorarium, as well as processes for claiming expenses such as travel and per diems.

Once the reviewers have accepted the invitation, the senior administrator is responsible for providing the terms of reference document (which may have been part of the invitation), a clear schedule, and the required information (including, of course, the Centre's self-study) in a timely manner to allow for enough preparation time before the site visit. Also, ask that a query about preferences (e.g., dietary considerations, breaks) is included to help inform your planning for the site visit.

When the reviewers arrive at the hotel, consider sending them a small token of acknowledgement (such as a package of tea or chocolate, or a small gift reflective of your locale) and a note of thanks in advance for the work they are undertaking on your behalf. A dinner invitation during their stay (depending on its length) with the senior administrator or director of the Centre might be appreciated. Alternatively, the option for the reviewers to have dinner together during their visit to have some time to reflect on what they have heard and to do some mid-review analysis to inform their report might be helpful. Communicate with your reviewers to learn what suits them best.

After the visit to campus, the senior administrator continues communication with the reviewer(s) to check in, remind them of timelines and expense claim procedures, and ultimately to obtain the final report. The administrator can also make any necessary queries or ask for clarifications about the content of the review report before ending the overall process.

With reviewer selection complete, it is time to get your site visit planned.

G. The Site Visit

In this section, you will learn about:

- What site visits are and their purpose
- Decisions to make when setting the site-visit schedule
- Specific logistics for the site visit

Defining a Site Visit

The site visit is a critical component of a Centre review. It generally occurs over one to three days and provides reviewers with an opportunity to engage in a range of real-time data-gathering activities. Those activities often include: engaging in individual and small group interviews or focus groups, touring facilities or specialized areas, and other activities that may be unique to each review (e.g., meals with Centre staff or senior administrators).

Purpose of the Site Visit

Both you at the host institution and invited reviewers need to think about the role that the site visit plays in relation to the self-study. A key goal is that the site visit enables the reviewers to collect additional information that will hopefully complement your self-study. When disconnects emerge, such information can be highly valuable, as it may signal some sort of issue in need of attention.

Importantly, the site visit also provides an opportunity for key stakeholders who are connected to the Centre to have their voices heard. In this way, the visit has an important engagement and educational development purpose: through a well thought-out process, those involved both contribute to the broader thinking about the Centre's role and its future within the host organization. A solid site-visit plan invites various stakeholders to reflect on what is of individual and collective value in terms of the Centre, and what future value could be realized.

Decisions in Setting the Site-Visit Schedule

The site visit requires advance planning to maximize its success. We have identified seven key decision areas to assist with your planning, summarized in *Table 9*.

Table 9. Site-Visit Planning Checklist

- ☐ Site-Visit Duration
- ☐ The Schedule
- ☐ Location for Reviewer Activities
- ☐ Sequencing and Timing of Activities
- ☐ Site-Visit Guide
- ☐ Site-Visit Activities
- ☐ Selecting and Inviting Stakeholders

1. Site-Visit Duration

One consideration is the duration of the site visit: it generally occurs over one to three days. The longer the visit (i.e., over three days), the more difficult it will be to engage reviewers who can commit to the length of time. As well, you may find it more challenging to arrange the overall schedule when you have more time slots to fill. However, a short visit (i.e., a day or a day and a half) can also prove frustrating for all involved.

What is critical is to balance both the needs of your institution and of the reviewers. Even with a detailed self-study, reviewers may find it difficult to take in everything (e.g., institutional culture, politics, personalities, relationships), particularly when they are external to your organization. Aim to strike a balance between 'getting it done' and respecting reviewers' time away from their home units. The overall visit duration also includes time for reviewers to process what they are hearing and discuss it as interviews and other site-visit activities proceed.

2. Determining the Schedule

In most cases, developing the site-visit schedule is likely an iterative and negotiated process: the Centre's director will often propose the structure and activities, with input, oversight, and final sign-off likely coming from the senior administrator who has taken the lead on the review. In setting the schedule, you will want to maximize efficiencies and the meaningfulness of activities to help rationalize the overall expenditure of resources put into the site visit. If you want to read about specific example site-visit activities, please see *point #6*.

The schedule reflects an organized and thoughtful plan that has been developed well in advance of the actual visit.

Planning ahead allows for input from the respective planners and also allows ample time to secure the various stakeholders. In some cases, you may also invite feedback on the site-visit agenda from the reviewers, enabling them to verify that the right range of input is in place to meet the goals of the review.

Importantly, the planned agenda and site-visit details go to the reviewers well in advance (i.e., a month) to guide their development of interview protocols, debriefing plans, and other related activities. The final details of your planned schedule may get revised in that last month, but the types of stakeholders you include will remain constant. You may also invite the reviewers to vet meetings scheduled to occur over meals (breakfast and dinner, in particular) to decide if these plans work for them. Some reviewers may request more downtime once they review the draft plan, and such requests should be honoured.

When you have developed what you think is the final schedule, review it with a critical eye, asking questions such as:

- Have we included all the major stakeholder groups?
- Have we allocated a reasonable amount of time for this particular activity, given the size of the group and its participants?
- Are there regular breaks for the reviewers and transition times between activities?
- Is the plan varied and interesting?
- If there is a tour, have the appropriate individuals been contacted to be present at the time noted in the schedule regarding the space/equipment being viewed?

Sample schedules for you to review and adapt are in *Appendix C*.

3. Location for Reviewer Activities

Care in selecting a main location for site-visit activities is not unlike planning a workshop. Keep in mind the following factors:

- The flow of people moving in and out of meetings
- Transition times

- Appropriately sized rooms for the activities
- Location of washrooms
- Space for refreshments or eating

Also, keep in mind issues of accessibility as you plan these activities (i.e., elevator locations for reviewers with mobility issues, location of gender-neutral washrooms). As well, a location away from your main office is helpful so that your staff and other stakeholders do not feel watched while coming and going from the meetings.

4. Sequencing and Timing of Activities

Overall, think of the scheduling from both the perspective of your institution and the reviewers. The goal is to avoid a marathon of activity. Instead, seek to judiciously plan a range and sequence that maximizes the time available without overstretching the reviewers' capacity to take in the new context, and the range of information being provided, and to subsequently make sense of it all. For example, if travel is necessary between meetings, ensure ample time is provided.

The schedule ideally also includes blocks of time for the reviewers to share their ideas with each other, and time to synthesize and prepare for the next phase of their work. This 'alone time' would often occur over a catered lunch or at the end of the first day (or mid-point time), and again at the end of the site visit to facilitate note comparisons, data analysis, and plans for next steps, including the process for writing the final report.

Consider, as well, the overall time involved in each meeting or interview relative to the size and importance of the group. Each meeting is generally no less than 30 minutes long as spending less time can be very stressful for the reviewers and participants. As well, meetings that are too long (e.g., more than an hour) may result in discussions that are not as focused or productive as they could be.

5. Developing a Site-Visit Orientation Guide

Malenfant and Deiss (2015) suggest the development of a site-visit guide that can orient the review team and provide guidance for various meetings with individuals and groups. This resource may be of value, they note, particularly for members of a review team who have not previously done a review. The guide can help ensure reviewers have the appropriate contextual information and institution-specific language:

> The site-visit guide can provide team members with opening comments for each interview with groups and individuals. This can help with messaging consistency regarding the purpose of the review and the ways in which it is being conducted and even could extend to how the results will be disseminated (Malenfant & Deiss, 2015, p. 148).

Such a guide is to be viewed as a 'shell' that the reviewers use to add their own questions and probes. What makes such a guide valuable is that it orients the reviewers to the various individuals (e.g., photos and/or a sentence or two for key individuals) and groups, and provides overall orientation comments for the various stakeholder groups as they are introduced to the review team. However, the value of the guide is as an orientation rather than as a prescriptive and restrictive document. The reviewers will develop their own questions and probes, based on their expertise and knowledge. Some sample orientation guide text appears in *Table 10*.

Table 10. Sample Content for Site-Visit Orientation Guide

Day 1: Meeting with Provost, Dr. XXX, 9:00-9:45 a.m. *Context*: Professor XXX has been Provost for the last 4 years, and was key to the creation of the Centre. Their current institutional priorities include: 1. Reimagining undergraduate education and the enhancement of undergraduate experiential learning; 2. Enhancing equity and creating more inclusive environments across the Institution, and 3. Engaging in faculty renewal.
Key Reviewer Questions (Reviewers generate these in the blank spaces provided in their guide): 1. We understand that one of your priorities is the re-imagination of undergraduate education and the enhancement of undergraduate experiential learning. In what ways has the Centre been able to support this priority? What do you see as future possibilities for how they can support this priority? 2. Teaching Centres can play a pivotal role in helping faculty and TAs create more inclusive teaching and learning environments. One of the documents provided in the self-study materials was a resource guide that is used in workshops and, we understand, is used as part of your intensive new faculty orientation sessions. Can you comment on how this has been received and if this kind of Centre resource development is an important part of their work? 3. Etc.

6. Site-Visit Activities

The site visit is, in essence, a collection of meetings with various Centre stakeholders. But various types of meetings can be included that you can customize for your particular institutional context.

Depending on the timing and duration of your site visit, you may want to include an opening orientation and collegial 'tone-setting' event. For example, an evening dinner might be planned to launch the review—reviewers, a senior leader(s), and the Centre director or key Centre personnel (e.g., associate director) may participate. What is important to avoid, if such an event is planned, is a late evening for reviewers, given that they have likely travelled and are preparing for the full day(s) ahead.

Start the site visit with an individual meeting with a key senior administrator, for example, the provost or vice-provost. Reviewers appreciate having a bit of orientation for this meeting, especially if you can provide perspectives on key priorities or issues that the University or this leader are focused on, or key questions that they may want to ask of the reviewers. The goal is that the reviewers feel a sense of preparation for this meeting, if possible. As Malenfant and Deiss (2015) note, "Try to uncover and make clear any agendas, whether spoken or hidden, so that the reviewers aren't unnecessarily surprised" (p. 149).

Depending on the size of the Centre, the reviewers (and your staff) may find it helpful to meet with all Centre staff towards the start of the first day just to begin to see the faces, learn the groupings of staff, and provide their expected framework for the site-visit meetings. Another option is to schedule an informal lunch for the reviewers with the Centre staff to help reduce staff members' stress and enable less formal discussions and information sharing. This type of event, however, may be a difficult 'informal' opportunity if the group size is large, in which case the reviewers may feel the need to provide more structure. An additional option for larger centres is to schedule a few sub-groups of staff members from the Centre throughout the course of the site visit.

Also seek to vary the nature of the activities for the reviewers. For example, a walk to see the Centre's office or workshop room(s) not only serves as an important data collection activity but might also break up a series of interviews in the afternoon. Reviewers are likely to want to see the location of your Centre and the rooms that are used, particularly if your terms of reference document includes questions about your physical space or location. While a change of scenery and activity can be valuable, it is important to keep in mind that all activities are purposeful.

You may also have a mix of meetings with specifically invited participants and meetings for which an open call for participants has been distributed (e.g., faculty members, graduate students). When considering the inclusion of 'open' meetings, think about the pros and cons. While an advantage is that such meetings might create a sense that anyone can provide input to the review, a disadvantage is that they could also prove a waste of the reviewers' time by having slots in the schedule with no participants. For reviewers, these 'no-show' time slots may also leave negative perceptions.
Near the end of the site-visit schedule, consider providing a final opportunity to meet with the senior leader responsible for the review. This meeting provides a short period for the reviewers to capture key ideas, express appreciation, deal with logistics, and confirm next steps in the completion of the report.

7. Selecting and Inviting Stakeholders

When planning for the various activities, consider the key individuals and stakeholder groups that could provide input, including those who are very engaged with the Centre and those whom you would like to engage in new ways in the future. Some possible constituent groups you might consider for meetings or focus groups include:

- Leaders of other key units/offices (e.g., Student Services, Graduate Studies, Writing Centres, Library, etc.)
- Academic leaders (e.g., deans, chairs, directors)
- Faculty (strive for diversity in terms of disciplines, roles, career streams, or experience)
- Partners (e.g. Library, other Centres)
- Students (graduate and/or undergraduate, as appropriate to the mandate of the Centre)
- Advisory group(s)
- Centre staff (e.g., could be in teams or logical groupings, such as Technology, Curriculum, Programming, etc.)—consider having staff groupings meet without their manager present

Since most Centres primarily provide support to faculty members, it may be important to get sufficient input from a larger sample from this group, but also ensure views from this group are appropriately balanced with other groups. Ideally, all invitations to participants for site-visit activities are sent by the senior leader responsible for the review. Often booking meeting attendees through this senior leader's office will result in greater attention and attendance. This approach also flags the importance of the review to the host institution and keeps a somewhat arm's length distance between the director and staff of the Centre and the review process.

Copies of invitations sent to all participants may also go to the reviewers, ensuring that communication and expectations are aligned since everyone knows what has been said.

Site-Visit Logistics

With your plans in place for the site-visit schedule, you now need to consider the specific logistical details for the actual event. Similar to planning a workshop or conference, the devil is in the details. The following are key strategies to help you execute a successful site visit:

1. To ensure time is well-used, **plan for groups or individuals to come to the reviewers**, rather than having the reviewers travel to the groups.
2. In cases where the reviewers need to travel to meet with participants, **ensure that you have identified an escort** who gets them to the location and possibly orients them to the next activity.
3. Is there a **token of appreciation or welcome** you can provide the reviewers that sets a welcoming tone (e.g., a special tea and mug awaiting them in the meeting room, a special nametag)?

4. If lunches are working lunches with groups of people being interviewed, ensure that you **include at least a couple of other breaks** in the day for reviewers to catch their breaths.
5. **Decide who will be responsible** for ensuring that the schedule is maintained and that people move in and out of the site-visit meetings on time. Identify this person early on and include their name and role in the site-visit schedule.
    a. Often this role is best done by someone who is very good at problem-solving since last-minute issues can arise or reviewers ask for additional resources. This person also needs to be comfortable with a wide range of stakeholder groups, making sure they are welcomed and shepherded appropriately. During meetings, they can be stationed nearby but outside the room, and provide a timely reminder when the end of the meeting approaches by knocking on the door.
    b. A different option can work for reviews that include a committee of reviewers. In one case that we experienced, the review committee had six members, including both internal and external reviewers. The senior internal reviewer served as committee chair, welcoming each participant group and clearly indicating when each meeting was over.
    c. The key to both of these examples is that someone needs to fill the role of time-keeper, and it is best if this is not expected of the reviewers.
6. **Identify a person to order** materials and arrange for all food and beverages for the site-visit activities. Ensure a range of dietary requirements are considered in this planning.
7. **Arrange for healthy snacks and hydration** for the reviewers and for participants. You may even ask the reviewers what kinds of snacks work for them (e.g., nuts, protein bars, fruit) and if they have special food requirements or preferences. The person identified in the previous point can plan accordingly.
8. Ensure that you have **easy access for reviewers** to charge their electronic devices.
9. **Prepare nametags or tents** for each person who has accepted the invitation to participate in the review.
10. **Invite more people than you want** for the group interviews or focus groups as there will always be some last-minute cancellations or no-shows.
11. **Determine whether or not you will provide additional materials** in the form of a binder or folder for the reviewers upon their arrival for the site visit (over and above the materials included in the self-study). In most cases, the self-study materials are more than sufficient.
12. **Consider providing a note-taker**. If doing so, alert the reviewers and participants in advance and be aware of potential discomfort (e.g., by Centre staff).
13. **Consider alternative ways to solicit input** from stakeholders. For example, you may encourage review participants to bring any specific ideas in writing to leave with the reviewers since not all ideas may be able to be discussed during the meeting time.
14. You may also **ask the reviewers if they are willing to accept any additional materials** from meeting participants after the site visit. For example, participants could send any other ideas by email for a set period of time after the visit (e.g., up to a week) to allow for any additional thoughts since not everyone may feel able to speak up during formal interview times.

The site visit requires attention to various details, but with careful planning, it will result in a useful data-gathering activity. Along with the self-study, the site visit provides valuable input for the reviewers when developing their feedback. Responding to this feedback is your next step.

H. Responding to the Reviewers' Feedback

In this section, you will learn about:

- Strategies for processing reviewers' feedback
- Decisions to make about disseminating the results
- Strategies for responding to the review

A key comment made by one of our senior administrators was that the reviewers were making *recommendations*. As such, these were not demands, expectations, or edicts that are followed without due consideration. Rather, they should be taken as thoughtful, collegial suggestions for careful reflection and used, with discretion and as appropriate, to inform Centre decision-making going forward for both Centre directors and the senior administrators within whose portfolio the Centre resides. We think this is an important point to keep in mind as you read the reviewer feedback for the first time, begin to consider your own response to the report(s), and go on to hear others' reactions.

Processing the Feedback Received and Disseminating the Results

If you had a site visit with reviewers, you will most likely receive a reviewers' report after the visit. If you had both an internal and external review committee, you may receive a report from each group. Links to sample reviewer reports for Simon Fraser University, the University of British Columbia, Elon University, and Illinois State University are in *Appendix B*.

The review report(s) will be directly submitted to the person responsible for the review process, most likely a senior administrator. The report may then be shared with the Centre director and managers within the unit. At this point, we recommend that the senior team and the senior administrator engage in discussions about strategic directions emerging from the review that involve senior leader advocacy, decision-making, or unclear next steps. The discussions might also include consideration of recommendations perceived as being 'off the mark' and that simply need to be set aside, temporarily or permanently. As well, those involved need to decide whether or not the report(s)—or perhaps a summary of the report(s) and recommendations—is shared with Centre staff and/or more broadly with your institution's community.

Ideally, the report would at least be shared with Centre staff so that, together with Centre leadership, staff would have a chance to review the results and discuss both:

1. How the findings affirm and support activities and directions
2. What insights emerge that help in new ways of thinking or present new options to explore

Such an approach could be a great team-building exercise, particularly if Centre staff members were heavily involved in creating the self-study beforehand, as a means to build investment and interest in the outcome of the review.

However, if sensitive recommendations emerge with respect to human and financial resources that might include changing the nature of staff positions, a change in funding, or job loss or reassignment, such recommendations are usually not made public even to Centre staff until decisions are made about the likely response by the Centre's management and senior administrator. Unfortunately, this circumstance is likely to cause tension and frustration for Centre staff and needs to be managed rather than left to drift. In this situation, a summary of key recommendations beyond those that deal with sensitive issues could be shared and discussed with all Centre staff as a means of providing at least some transparency.

Processing a review report need not happen quickly. A Centre review involves a process, so aim to give everyone involved some time to digest the new ideas presented and consider how any changes may affect their roles. Also remember that some recommendations may be highly sensitive and will require special consideration.

If Centre staff members are involved in processing the reviewers' recommendations, multiple meetings, or even a Centre retreat might be useful to determine how best to proceed. While many good ideas may emerge, try to remember that Centre staff can only accomplish so much at any one time. So, determining what the Centre priorities will be, what will no longer be a priority, and what aspects of your work may be slated for future initiatives, are all important decisions. Financial as well as human resources will play a role here as well. If new funding or new roles have been suggested, are these the correct ones and how will that growth be implemented? Space considerations within a Centre may also be a challenge for implementing changes.

How much public transparency is possible or desirable beyond the Centre will depend on the purpose of the review, the nature of the recommendations, and your institution's procedural norms or rules. Again, key recommendations and responses might be highlighted for academic leaders even if the full self-study and review report(s) are not made available. A summary report or short presentation might be appreciated by busy staff, academics, and leaders.

Strategies for Responding to the Review

Consultations Post-Review Outside the Centre

If any clarifications are needed from reviewers, a conversation with them needs to be organized as soon as possible after receiving the report, while the process is still fresh in their minds. Setting this meeting is a role for the main contact, most likely the senior administrator responsible for the review.

The report(s) may instigate further consultation or engagement with various stakeholders. Some reasons for such consultations may be when:

1. Staff movement to other units is suggested
2. Consolidation of resources with other units is recommended
3. Partnerships with other units need to be considered
4. The decision-making process moves beyond the Centre and requires discussion with other units

Where such recommendations are going to be explored, meetings need to be organized and chaired, ideally by the senior administrator, to facilitate conversations and to show support for potential change across units. This facilitation role may be especially needed when other units are not open to change but the change is deemed to be required institutionally.

When internal and external reviews have been conducted simultaneously, comparison of the two reports will be necessary. Where consistency between reports occurs, you will have further evidence of needed change or status quo. Where inconsistencies arise, discussion amongst the leadership is important to establish a possible explanation for the differences: this dialogue provides an important opportunity for open discussion and decision-making as you consider varying options.

Prioritizing, Sharing, and Using the Results

A Centre retreat and ongoing meetings for a period of time may be necessary to engage Centre staff with change and to establish a positive viewpoint with respect to the changes. A general timeline or order of priorities needs to be established, including any closing out of programming or other activities that your Centre is currently providing.

You may be required to produce a formal response to the reviewers' report(s) that may be public, along with a summary of your self-study report that could be shared with deans, associate deans, and/or Senate for information and possibly for further direction. Such a response document would also be useful to revisit between reviews to remind leadership and staff of the goals that were set and to track progress. Links to sample response reports from the University of Waterloo, Simon Fraser University, and the University of British Columbia appear in *Appendix B*. A sample outline for a response report (from the University of Waterloo) appears in *Table 11*.

Table 11. Response Report Outline

Section Headings in Response Report	Description
Summary of the Review (One page)	Briefly outlines the review process, including date of self-study submission, general contents of the self-study, the reviewers' names and affiliations, and details about the site visit such as participant numbers and affiliations
Centre Characteristics (Less than one page)	Includes a brief history of the Centre, identity statements (mandate, vision, mission), staffing numbers, areas of service provided, and key client groups
Summary of Strengths, Weaknesses, Opportunities, and Challenges (Less than one page)	Summarizes reviewer feedback for each area using bullet point format
Summary of Key Findings (Less than one page)	Summarizes the findings at a high level
Centre Response to Reviewer Recommendations (As many pages as needed)	Enumerates the recommendations, providing a summary paragraph about each recommendation and a brief response to each one—includes recommendations to which you do not plan to respond, along with an explanation for your decision
Implementation Plan (As many pages as needed)	In a tabular format, identifies each recommendation, proposed actions, person or team responsible for each action, and a proposed timeframe to work on and complete each action

If you are required to submit a detailed response report, seek to secure a report deadline that is at least two months after you have received the reviewers' report; more time may be needed if the recommendations involve major changes or you are in a peak workload time.

A formal response may not be required; however, an informal document outlining directions and timelines to keep track of decision-making and ongoing developments can prove useful. These types of information may be incorporated into your Centre's strategic plan or some other type of strategic document. In addition, revisiting the report(s) and your own initial responses annually, as part of your planning process for the coming year, will allow you to keep the key review goals in focus as you move forward. This annual check-in is also a good opportunity for 'taking stock', realizing your accomplishments to date and documenting key changes for annual reports or future Centre reviews.

You can also consider using this response report to guide future review processes. Keeping a record of what was accomplished, what was not, and why would be useful contextual information for future reviewers so that they are aware of the history of the Centre in relation to reviews.

With the review cycle now thoroughly described, we move next to the roles and responsibilities of reviewers, approaching the next chapter from their unique perspective.

IV. Serving as an External Reviewer

The previous chapter provides guidance to those undertaking a Centre review. This chapter focuses on being an external reviewer, since an external role is the one that we and our colleagues in the educational development community are asked to take for a Centre review. The chapter aims to identify the steps and decisions involved in contributing to a successful review as an external reviewer, from preparation through to your final report. Internal reviewers will also find much of the advice in this chapter relevant to their situation, and senior administrators are encouraged to share this resource with either type of reviewer.

A. Preparing to be an External Reviewer

In this section, you will learn about:

- The role of an external reviewer
- Typical timing of an external review
- The review documents
- Strategies for working as a member of a review team
- The site visit

Your Role as Reviewer

External reviewers are recognized leaders, often with related experience in teaching and learning in higher education. They most often also have first-hand knowledge and experience with the work of Centres focused on educational development. Typically, reviewers will be selected and invited by a senior administrator based on a suggested list provided by the Centre director. There will often be at least two external reviewers, though this varies by institution. The external review process may also be part of a larger review that includes an internal review process. In some cases, the internal review will already have been completed and a report will be made available or, in other cases, the internal and external reviewers work concurrently and collaboratively (when the reviews are combined). The intended process should be made clear in the terms of reference document.

External reviewers, often part of a small team, investigate and report on issues and make related recommendations meant to enhance the function of the Centre in supporting its mandate and mission. The review team typically conducts an in-depth review of the terms of reference, the self-study, and any related documents, and then visits campus to conduct interviews and focus groups with stakeholders. A review report, with related recommendations, is typically the end product and is intended to positively impact the Centre and institutional capacity in teaching and learning.

There is a tendency to frame a Centre review in similar ways to an academic review; however, there are often key differences. For example:

- As a reviewer, you cannot assume that the staff whom you meet during the site visit are familiar with review processes. Centre staff and those from other service units that collaborate with the Centre are likely to be new to the process so may not know what to expect or how best to prepare.
- The Centre typically supports the campus community in ways that can be opaque. As such, evidencing the impact of the Centre's work can be a challenge (e.g., advocating for an enhanced teaching culture in a multitude of ways). Many of the traditional academic measures for academic program reviews used to provide evidence related to teaching, research, and service will not be appropriate or sufficient.
- The review can occur in an environment where members of the Centre's staff are not part of the tenure or union systems and, therefore, may be subject to a lack of job security.

Being invited to be an External Reviewer means you are seen as an expert who can provide valuable feedback to help the host institution move forward. Congratulations on being recognized!

To prepare for your role, consider the typical review timeline in *Table 12*, which is from the perspective of a reviewer (the timeline for the host institution is much longer!). You will have more to do than collect data during a short site visit.

Table 12. Typical Timing of an External Review for Reviewers

3-6 months before the site visit	1-2 months before the site visit	1-3 days	1-2 months after the site visit
1. Invitation received 2. Introduction to review team 3. Review terms of reference document 4. Confirm timing of the review, including site visit and final report due date	1. Self-study provided to you 2. Additional internal review / resource documents may also be provided to you 3. Itinerary confirmed by the host institution 4. Connect with other reviewer(s)	On-site visit	Analysis and report writing, including final submission

The Review Documents

Terms of Reference

Provided by the senior administrator charged with overseeing the Centre review, the terms of reference is the key document to consider when preparing for the review and campus visit. Guidance for developing a terms of reference appears in *Chapter III, Section D*, which may be useful for you to review to determine if you have received the information that should be available to you in this document. The questions included in the terms of reference will guide much of your investigation, so you need to feel that you can address them. In the case where you receive the terms of reference and have concerns, speak directly with the senior administrator responsible for the review to clarify and/or revise the document accordingly.

The self-study, prepared by the Centre staff, should align with and inform the questions raised in the terms of reference, but likely will also suggest other issues or considerations. And once on-campus, yet other issues may rise to the surface. You may address all of the above in the final report, but the primary focus is on the questions formally raised in the terms of reference and any subsequent related communications. (See *Appendix A* for a sample terms of reference document).

Once the terms of reference document has been clarified and agreed upon, the next area of focus is the self-study and any supporting documents that the host institution sends to the reviewers.

The Self-Study

The self-study will be the most in-depth form of evidence for you to review, alongside a host of supporting documents (e.g., institutional strategic documents, past reviews) in anticipation of your visit. *Chapter III, Section E* provides detailed guidelines about writing a self-study, which will help you to identify the types of material you would expect to see in such a document.

You will find that most of the needed resource documents will be included along with the self-study (e.g., institutional strategic plan). If not, this is a good time to request them or search online for any missing or additional documents. The self-study may include numerous links to online resources for you to review.

At some institutions, an internal review precedes the external. For example, a review of Centre leadership may be done prior to the external review of the Centre, the latter of which will provide future directions for the Centre's leadership. If an internal review has occurred, then an additional internal review report may also be available.

Lock yourself away and start reading, keeping the terms of reference by your side. Jot down questions and keep a running list of issues to explore further with your review partner(s). Ideally the self-study will provide insight on those issues, but other patterns or surprises will likely emerge. These issues can also become the foundation for further exploration when on-site. You will most likely find it helpful to share your thoughts on the self-study with the review team before the site visit begins to develop a shared understanding for the on-campus investigation.

The Site-Visit Schedule

At this point you should have travel and accommodation arrangements, information about local fare, and a key administrative contact. If those details are handled by the host institution, ensure good communication regarding logistics and the kinds of expense information that you need to maintain to get reimbursed.

With your travel plans made, the last important document you will receive before your visit is the itinerary for your on-site visit. This document lists all meetings, individual and small group interviews, dates, and locations.

A few guidelines for you about the site-visit itinerary:

- Be sure to **check for alignment** between the specific questions and issues your review team has identified and the stakeholders with whom you are scheduled to meet. Identify missing or extraneous stakeholder meetings, and request any needed changes, aiming for 360 degree interactions.
- **Request as few *open* or *drop-in* meetings** as possible—participation is unpredictable and may not be the best format for engagement.
- **Make sure that there are enough breaks** scheduled to accommodate your personal needs—for example, if working lunches are planned, these may not provide you with the downtime you need to be focused for your afternoon meetings.
- **Have the contact information** for your administrative support and review team member(s), including cell phones if available.
- **Ask for a copy of the invitation email(s)** sent to internal stakeholders for their site-visit meeting to learn what they were told to expect (if anything). Remember that many of the stakeholders you will meet may never have been involved in a formal review process.

Important Documents in Anticipation of the Review Visit

- ☐ **Terms of reference**
- ☐ **Self-study**
- ☐ **Site-visit itinerary**

Working as a Member of a Review Team

As an external reviewer, you will have received a formal invitation from a senior administrator at the host institution. At that point or soon after, you will also learn who will join you on the review team. Seek to develop a collaborative strategy and approach, discussing explicitly that all team members share responsibility for the review and a single final report.

An early step would include reviewing the terms of reference document independently and as part of a team. In doing so, you might want to consider the following questions and advice.

Context

1. **What are the drivers** for conducting the review at this point in time?
2. **Is it cyclical or related to changes** in leadership, resource allocation, structure, etc.?
3. Recognize the **possibilities and complexities** of multiple agendas.

Terms of Reference

1. **Are the terms of reference questions manageable?** For example, one such question asked for recommendations regarding budget specifics. After discussion, the question was altered to include recommendations regarding the alignment of resources to the Centre's mandate.
2. **Identify, if needed, other important documents and resources** that will inform your investigation.
3. **Clarify expectations and guidelines** for the final report(s), including:
   a. Expected length and detail
   b. To whom the final report is to be directed
   c. Particular types of feedback the host institution may *not* want in writing
   d. If multiple versions of the final report are being requested
4. That a review has been undertaken and by whom is not generally considered a confidential matter; however, the report and recommendations most likely are. It is a good idea to **seek clarity about confidentiality** by referring to the terms of reference document or asking the senior administrator who invited you.

Team Process

1. **Acknowledge and benefit from the strengths and experiences of each reviewer**. In your pre-visit conversation, consider discussing more than your thoughts about this particular review. Other helpful information to exchange includes your experiences with reviews, strengths each person brings to the process, and other topics that begin to build rapport and a working relationship, especially if you have not worked together before or do not know each other's professional work.
2. **Schedule-match** (i.e., share vacation dates) for the duration of the review process, including the visit preparation and report-writing phases.

3. **Determine how notes will be taken at the site-visit meetings**. Administrative support for note-taking may be beneficial. Someone from the host institution who can confidentially capture the main themes and ideas can be a very useful asset (this resource would need to be requested of the host institution in advance of the visit). If you have access to a note-taker during the site visit, discuss how you as reviewers will capture additional key observations, insights, or questions that will be used for the report. Alternatively, you can take notes yourself during the interviews. Either way, make sure you have detailed notes to refer back to when reflecting on the site visit and doing your analysis.
4. **Decide how you will handle who asks questions during the site-visit meetings**, particularly if you are a team of two. Being focused for full days of meetings can be exhausting, so plan ahead. Will one of you be asking questions and the other taking notes, or will you alternate this process throughout? Perhaps you will have a 'lead' questioner, with the other asking follow-up questions for clarification. Discuss your strategy in advance to make the interview time efficient.
5. **Determine how the report will be handled** in terms of analysis and writing logistics. Be specific with your review team as to how analysis will be shared amongst reviewers and exactly how the report will be written, by whom, and in what timeframe. One structured way to proceed might be to share your analyses synchronously soon after the visit, followed by one reviewer taking the lead on writing the report using a cloud-based word processor, with others editing and contributing iteratively. Others may choose to split up the writing by sections or areas related to the terms of reference or areas of expertise. Also, be sure to clarify your process for editing and reviewing each other's work, including how to reconcile points of difference.
6. **Overall, strive to be a responsive and professional team member**. Schedules sometimes change for unforeseen reasons. Keep the lines of communication open with your team member(s). Remember that reviewers are selected to provide their unique insights, so everyone needs to contribute to the whole process. Any issues with an unresponsive team member need to be discussed with the review committee chair (if there is one) or the senior administrator charged with overseeing the review.

As a review team, you may want to develop your own informal group contract based on the working norms and procedures that you have discussed and agreed upon.

Considerations for the Site Visit

Before the site visit, you will want to develop questions to use as a starting point for stakeholder meetings. Note that the time with each stakeholder may be relatively short, with little time for relational or meandering conversations.

Several approaches exist for identifying questions. These approaches include: 1) Identifying key questions that specifically map to issues raised in the terms of reference and self-study, or 2) Using open-ended and general questions that allow patterns to emerge, like a Start-Stop-Continue format. A combination of both might work best. Here are some possible general questions:

- How do you see your role in the context of the mission and work of the Centre?
- What do you want to tell us about the Centre as part of this review?
- How well are things working now? What's the ideal situation?
- What should the top three priorities be for the Centre in the next five years?
- What else should we know?

You might also want to reference *The Faculty Development Matrix* from the American Council on Education (ACE) (n.d), which is a great resource. Their matrix is organized according to four standards that indicate Centre development as well as institutional commitment to the work of educational development. The standards are: 1. Organizational Structure, 2. Centre Location, 3. Resource Allocation and Infrastructure, and 4. Programs and Services.

These ACE standards may be part of your analytical framework. *Chapter IV, Section B* provides additional frameworks. Some reviewers may want to organize their site-visit questions and their note-taking according to an analytical framework to assist with report-writing later, but be cautious: the provision of too much structure or a rigid template may unnecessarily restrict your efforts.

Consider a combination of general and specific questions.

Depending on the length of the site-visit meetings, you may only be able to ask three or four questions: prioritize for each stakeholder group so you can address the issues of most relevance.

The site visit itself is typically a fast-paced, immersive experience over one to three days with multiple back-to-back interviews and activities, so you need to stay on-track while appropriately honouring stakeholder perspectives and listening carefully. Details about planning and running a site visit appear in *Chapter III, Section G*, which may provide you with additional ideas about how your site visit could work.

Likely you will have an assigned meeting room where stakeholders will come to speak with you. Consider the layout of the room and determine seating that is optimal. The room is your space, so adjust it as needed to make people feel welcome. Typically, meetings will occur during regular work hours.

The administrative contact will likely meet you at the assigned meeting room, where drink and food are available that is regularly replenished. This contact person is key for orientation, needed resources, and other supports during your stay.

Eat! Drink! Stretch! Stay replenished...

Our experience is that stakeholders are thrilled to give their perspective. At your site-visit meetings, you will likely hear four types of comments:

1. Relevant comments informing issues raised in the terms of reference
2. Relevant comments informing issues identified by the review team
3. Relevant comments identifying new potential issues or those raised by other participants
4. Comments of questionable relevance

You may find it difficult to distinguish the comments in the moment, so make sure you have detailed notes!

Debriefing with your team member(s) is also important. Try to plan for team debriefs in between meeting times, at the end of each day and, most importantly, prior to the review team leaving at the end of the site visit. Just before your departure is a particularly good time to collaboratively prepare a report outline and to confirm timelines and roles amongst your team. Any plans you can make regarding the data analysis, which is the next stage in your process, will also be helpful.

Enjoy the experience. A Centre review can be a transformative experience for the reviewers too!

B. Analyzing the Findings from the Review

In this section, you will learn about:

- Centre analysis frameworks
- Considerations for your analysis

Now that the site visit is over, you will be able to reflect on and analyze the diverse range of feedback, data, and evidence you received during the review process. Hopefully during your visit, you took detailed notes (or had notes taken by a designated note-taker) and regularly debriefed with your review team. Perhaps you and your team have already captured key *themes* in a shared document that will form the foundation of your report.

Now it is time to gather all of the resources available that have informed your work thus far—the terms of reference and other related review communications, related resource documents, interview notes, and team debriefs—and move to complete your (largely) qualitative analysis. Remember to return to the self-study: when you are steeped in the most recent site-visit interview data, the self-study information may get lost, but it is a critical foundational source of data.

The remainder of this section will assume you have the experience and expertise to complete your analysis without an in-depth qualitative method review. However, you might find it helpful to use a framework to organize your ideas, given all the disparate data sources. You may have identified one when preparing for the site visit, but if not, now is the time. Typically, the questions posed in the terms of reference will be the primary frame for your analysis, but they can be combined with other topics as suggested in the frameworks found below.

Looking for a simple refresher on coding for qualitative analysis? See *Impact: Center for Evaluation and Research* for a brief reference sheet on coding qualitative data (n.d.).

Centre Analysis Frameworks

The following three frameworks can help you determine what to analyze beyond the terms of reference, and provide some guidance for organizing your thinking.

1. Use the Faculty Development Matrix from the American Council on Education (ACE) that presents four standards to indicate Centre development and institutional commitment to the work of educational development:
    a. Organizational Structure
    b. Centre Location
    c. Resource Allocation and Infrastructure
    d. Programs and Services
2. Separately consider issues related to:
    a. Effectiveness (does it work?)
    b. Efficiency (is it sustainable/efficient/positive cost-benefit?)
    c. Adequacy (is it enough?)
    d. Appropriateness (does it make sense?)
    e. Impact (does it make a difference?)

3. Use a SWOT analysis (see Jurevicius, 2013, for more information):
    a. Strengths
    b. Weaknesses
    c. Opportunities
    d. Threats/challenges

Considerations for Your Analysis

Whatever framework you use for your analysis, remember that a Centre review is not formal research; rather, you will want to highlight ideas that are heard frequently from multiple sources as well as individual ideas that are compelling.

Remember as well that you will be creating a story for the final report from various snapshots, so providing the source of your evidence for your recommendations is helpful context for readers of the report (e.g., self-study page number, site-visit meeting). Typically, you would not want to identify any specific stakeholder as a source in order to encourage candid input to the review. Explaining how you reached your conclusions, though, can help readers determine how your ideas emerged. Be meta!

Early in your analysis, you will also want to consider the structure and format of the final report(s) that you will be submitting, especially if writing is a part of your analysis process. Refer to *Chapter IV, Section C* for more details about writing the report.

It will also be important to note the limitations of the review—missing or incomplete information or access to relevant stakeholders (e.g., stakeholders unavailable to meet).

As indicated in the last section, your analysis will likely identify four types of information collected, which might help you prioritize themes in your analysis:

1. Relevant to issues raised in the terms of reference
2. Relevant to issues identified by the review team
3. Relevant emergent issues identified in your analysis
4. Non-relevant information

The first two categories will feature prominently in your final report. Issues identified as emergent will have to be discussed with your review team, and you can discard the rest.

You might find it useful to organize your analysis to easily share with your review team for discussion and have a record in preparation for writing the final report. An example appears in *Table 13*.

Table 13. Analysis Template

Terms of Reference and Identified Themes	Findings	Recommendations
1. Questions, issues, and themes identified in the terms of reference 2. Questions, issues, and themes identified by the review team Review terms of reference document 3. Stakeholder-identified emergent themes, challenges, and opportunities 4. Your own emergent questions, issues, and themes	Use the self-study, interviews, meetings, documents, etc. and your own expertise to articulate key and priority opportunities and constraints	Propose solutions to address constraints or opportunities uncovered during analysis. Illustrate with existing examples, if possible. Provide concrete suggestions for improvement, including ways to build upon current strengths, overcome weaknesses, and increase effectiveness and efficiency. Offer specific strategies for addressing the key challenges affecting the unit. Keep in mind there are no unlimited resources—provide reasonable recommendations.

Give yourself time to engage in this important preparatory step before starting to write the report. You may also need to do additional analyses after the report writing has begun, as new issues or ideas may emerge.

With at least the initial analyses done, you are ready to start writing the report.

C. Writing the Review Report

In this section, you will learn about:

- The report purpose and audiences
- Final report length
- Strategies and suggestions for writing the reviewers' report
- Navigating challenging situations

By now you will have completed all of the tasks related to the external review, and it is time to prepare the final report(s) to be submitted to the responsible senior administrator. "A report is generally defined as a formal account of the proceedings and conclusions of a person or members of some group of people charged with writing about an assigned topic of interest and concern" (Berger, 1993, p. 23).

What is important to consider in writing an external review report is that this document needs to be clear, interesting, and credible.

The following ideas and practices will guide you in realizing these important goals. Links to sample reviewer reports for Simon Fraser University, the University of British Columbia, Elon University, and Illinois State University are in *Appendix B*.

The Report's Purpose and Audiences

The terms of reference document outlines the goals of the review and, therefore, serves as an important guide for writing the final report(s). In most reviews, a single report will likely be the end result of your review team's work. However, there are circumstances whereby multiple reports are requested or appropriate. The terms of reference is the document that articulates if the host institution would like multiple reports and what is the responsibility of the reviewers and the host institution.

Final Report Length

'As long as it needs to be' typically means 10-15 pages, single-spaced, not including appendices (if present). Something to keep in mind is that the longer the report the "less likely that people will read it all the way through or carefully" (Berger, 1993, p. 31). A discussion with the host institution before the review regarding the preferred report length will ensure that the reviewers honour the expectations and norms established by that institution.

Strategies and Suggestions for Writing the Reviewers' Report

Writing in academic contexts involves a broad range of approaches, dependent on the purpose, context, and audience. Berger (1993) outlines seven suggestions to guide your writing approach. Attention to these items increases the chances that the report will be a credible, professional document of value to the relevant parties and the institution being reviewed.

Stance

1. **Write in a Formal Style**. Using a more formal style rather than a conversational style keeps the reviewers' final report succinct and grounded in the terms of reference. It also communicates that the reviewers have taken a serious approach to the job at hand.

2. **Avoid Emotionally Charged Language**. Data and facts can speak powerfully if highlighted within the report, more so than powerfully charged words. When reviewing your final report before submission, each review team member should read the document closely to ensure that it sounds reasoned and objective, and does not include any emotionally charged language.
3. **Provide Reasonable Evidence**. In the case of disagreements or polarized views that emerge from the review, provide the evidence regarding these, and where possible, comment on what you as the reviewers found to be the more compelling evidence.
4. **Explain your Thinking**. When providing your assessment comments, describe how decisions or recommendations were reached, with reference to the factors and evidence that informed these.
5. **Be Specific**. Seek to reference and triangulate the material from the self-study or additional requested information, including statistical data and qualitative stakeholders' data generated during the site visit. By continually returning to the data, your report remains focused and you avoid making generalizations that go beyond the data. As in other forms of academic assessment, ensure that your report is balanced by highlighting positive areas and areas for improvement. Specificity of themes and actions grounded in the data reviewed can ultimately increase the credibility of your review and its potential use to the institution and the unit being reviewed.
6. **Give Advice, not Edicts**. Consider avoiding direct assertions and seek to qualify suggestions. For example, while you will likely have a list of recommendations, these are best thought of as ideas for serious consideration. You may also want to include another list of additional suggested actions for consideration.
7. **Carefully Consider What You Put in Writing**. Keeping the reality in mind that even confidential reports may not end up being so, any challenging, highly contentious, or sensitive finding may best be provided to the institution through other means, such as via a phone call.

Organizing and Writing the Report

Being objective and comprehensive, while also being succinct, can be a challenging task since you are working with the data from the self-study and the site visit, which may or may not provide all the information you need to carry out your interpretation and make recommendations. Do not hesitate to note where you feel you did not receive enough information to inform a fair assessment. In some cases, you may have requested additional information during the site visit (e.g., an updated organizational chart), in which case you will want to note that your final report incorporated these data so readers are clear which resources you are referencing.

As you organize the report, you will want to refer to the specifics within the terms of reference, but also identify other key issues that arose during your review. The self-study may also have included additional questions or issues that the Centre would like the reviewers to comment on, and such questions are included in the report. As well, your analytical framework (as discussed in *Chapter IV, Section B*) may inform the structure of your discussion or recommendations.

> **Be sure to check if the host institution has a required report template or other type of specific instructions, and use them.**

Early in the process, you will also want to ensure that you have a clear understanding (in writing) of when the final report is due. A general suggestion is to allow for at least one month to do the writing and give time for the ideas to distill while also providing time for editing back and forth between review team members. Also establish up front with the host institution if they want the opportunity to clarify any factual errors in the final report. If the institution wants this opportunity, then time for this feedback needs to be built into the overall timeline.

While review reports may have a variety of structures, *Table 14* outlines the components that we recommend.

Table 14. Components of a Review Report

Component	Details
Cover Page	Indicates the unit being reviewed, to whom the report is being submitted, the authors (reviewers), and the date.
Table of Contents	Includes the sections of the report and page numbers.
List of Tables or Figures	May or may not be included.
Executive Summary	Optional and may depend on the overall length of the report. If you include this, it is relatively brief, and summarizes key findings or recommendations.
The Review Process	• What you as reviewers were invited to do (terms of reference will usually outline what was requested and why). • List the materials provided and any additional materials you requested and received during the review. • Timeline for the review. • Methodology used (e.g., semi-structured interviews with various stakeholders, focus group protocols, mid-review analyses). • Feedback on the review process to identify limitations of the data made available for you to review or to outline other factors that influenced your review. You may also want to include suggestions to guide future reviews.
Overall Observations, Comments, Recommendations	• Sharing your overall impressions before discussing specific recommendations provides the reader with a sense of your understanding of the larger context and sets the stage for the subsequent comments and recommendations. • You may also decide to provide overall observations in a separate section from the recommendations. • Depending on the specifics of the review, it may or may not be possible (or fruitful) to align the structure of the report to the terms of reference questions. • Numbering the recommendations enables easy reference to them later both for you and the Centre's staff who receive your report and may need to provide a response to it. • Ensure the terms of reference questions have been addressed in the report (either in this section or the next) or provide a clear rationale why you were not able to address them all. If you feel this latter situation is emerging during the review, be sure to raise it with your senior administrator contact during the process rather than leave it to the final report.
Conclusion	Any final summary comments (e.g., acknowledging the efforts of those being reviewed).
Appendices	Not necessary but may include key documents from the review (e.g., terms of reference, site-visit schedule).

Navigating Challenging Situations

"And it is because most people who have been around academic institutions for any length of time know this that reports are often extremely controversial and seldom accepted on face value, especially by those who might be harmed if the recommendations of the reports were to be implemented. Thus, reports must be seen as political documents…" (Berger, 1993, p. 24).

Situations may arise when the review team chooses to write a separate missive related to a sensitive issue that is deemed best reported on separately. For example, if a performance-related issue with a specific person arises from multiple sources, you may want to report on this separately in writing or via a phone call. What is key to this decision is to ascertain the boundaries of what you have been asked to review. One adage recommended by Berger is if you are really not sure whether or not to reference a particular issue it may be best to document it but not include it in the report: "When in doubt, leave it out!" (Berger, 1993, p. 29).

Review teams may also fail to reach consensus about one or more of their recommendations. In such cases, one strategy is to include in the report the ideas generated as possible options for the staff of the Centre being reviewed to select what best fits with their context. If this strategy is not feasible, reach out to your senior administrator contact for advice.

Final Thoughts

Overall, remember that the collective effort expended by all parties in preparing for and engaging in the review results in a high-quality process and final report that is of use to the stakeholders and of professional pride to the authors. The goal for both the review process and the report writing is that the information generated will support an ongoing quest for high-quality educational development and guide the next stages of thinking and action for the host institution's Centre.

V. Concluding Comments

Now you are set to complete your work for a Centre review, whether you are being reviewed, serving as a reviewer, or providing oversight as an administrator. We have shared background information about Centre reviews and provided a comprehensive overview of the entire Centre review process—from understanding the purpose of your review through to responding to the reviewers' report. By making many implicit processes explicit, we hope that our experiences with the review process will provide you with the guidance you need as well as an enthusiasm for your role. We strongly believe in the value of doing Centre reviews and trust that you will find the process equally beneficial.

As we shared in the Introduction to this Guide, a Centre review, "involves a process of critical reflection on high-level, strategic questions about the direction and the work of a Centre, and it is completed by members of that Centre as well as selected colleagues external to the unit." The process that we have described is reiterated in *Figure 2*. We trust that the questions we have raised throughout this Guide and the steps and strategies described for the various processes involved in a Centre review are adaptable to your specific context and will help make your experiences both efficient and generative. Additional resources are available in *Appendix D*.

Figure 2. The Review Cycle

If your Centre is undergoing a review, we encourage your team to advocate for and help direct the processes and the outcomes of the many stages. This is a review of the health and future direction of your Centre, so share your ideas, your expertise, your data, and your passion for your work. Strive for as much transparency and involvement as possible to maximize buy-in and minimize fear of the unknown. And remember to thank your reviewers for their time, their wisdom, and their insights.

If you are a reviewer, we also encourage you to approach the review from a stance of respect and gratitude. Applaud the reviewees for their preparation, for their courage to be critical of their work, and for doing the hard work of envisioning the future of their Centre. Thank the site-visit participants for their time and their ideas. And let senior administrators know that you value their support and guidance.

If you are a senior administrator, recognize the importance of your leadership role but also value the wisdom to be gleaned from reviewers and reviewees. The review process is critically important for a Centre's planning and evolution: encouraging and supporting the participation of all involved is a significant contribution.

We are also aware that reviewers and reviewees are likely colleagues since we are often involved in the same professional community. Recognize that there may be feelings of vulnerability or uncertainty in both roles. We encourage you to reach out to one another when the review is completed to re-connect and move forward.

In addition, our work in preparing this Guide reinforced our initial perceptions: the practices and processes used in Centre reviews is a gap in the educational development literature. Very few resources are available to help guide the review process, question its value, or extend our understanding. As such, we encourage you to add to the conversation by making your review documents public as permitted and sharing your processes and experiences in the literature. Centre reviews constitute an important and emerging area of scholarship in our field.

Overall, Centre reviews provide an enormous opportunity for all involved.
We hope that this Guide enables you to make the most of this enriching experience.

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Appendices

Appendix A: Example Terms of Reference Document

The review process is intended to ensure that:

1. The quality of the unit's programs is high and there are measures in place to ensure the relevance, evaluation and revision of its programs.
2. The quality of [unit name's] faculty/educational development work is high and relevant to the needs of [institution's] instructors and academic units.
3. Unit members participate in the administration of the unit and take an active role in sharing resources and disseminating knowledge for supporting teaching and learning.
4. The unit's environment is conducive to the attainment of the objectives of the unit.

Review committees make their assessments taking into account the resources currently available to the unit and the University.

The review committee will assess the [unit name] and comment on its strengths, challenges, and opportunities for improvement, and on the quality and effectiveness of services. The review committee will prioritize recommendations that address areas for improvement and areas of concern, with due consideration of the resources available to the Centre.

The following specific questions should be addressed within the context of the broader questions above:

1. Does the [unit name] have a clearly defined mandate, together with a viable and relevant strategic plan?
2. Does the [unit name] provide the appropriate kind of services and good quality services to its stakeholders?
3. Does the [unit name] partner effectively with other units and governance bodies that support [institution]'s learning environment?
4. Are there emergent areas in teaching and learning that should be pursued, given the current state of educational development in Canada and beyond? Are there areas of activity that should receive less attention in future?
5. Are the resources available to [unit name] appropriately allocated, in view of the strategic priorities of the unit?
6. In view of the fact that we are currently recruiting a new director, what are the priorities for the next director of the [unit name]?

Appendix B:
Sample Self-Studies, Reviewer Reports, and Responses to Reviews

Self-Studies

University of Waterloo

- Visit the "About" tab for the Centre for Teaching Excellence to find the 2017 Self-Study: https://uwaterloo.ca/cte/annual-reports-external-review

University of British Columbia

- Visit the "About" tab for the Centre for Teaching, Learning and Technology to find all of the documents related to their 2016 external review https://ctlt.ubc.ca/about/
- 2016 Self-study: https://ctlt2013.sites.olt.ubc.ca/files/2016/11/CTLT-External-Review-Self-Study.pdf
- 2016 Self-study appendices: https://ctlt2013.sites.olt.ubc.ca/files/2016/11/CTLT-Appendix.pdf

The Ohio State University

- Visit the "About" tab for the University Center for the Advancement of Teaching to find the 2014 Self-Study link https://ucat.osu.edu/about/
- 2014 Self-study: http://ucat.osu.edu/wordpress/assets/OhioStateUCATSelfStudy2014.pdf
- 2014 Self-study addendum: http://ucat.osu.edu/wordpress/assets/SelfStudyAddendum.pdf

Reviewer Reports

Simon Fraser University

- 2007 Summary of Review: https://www.sfu.ca/content/dam/sfu/vpacademic/files/vp_academic_docs/pdfs/LIDC_ExtRevSum.pdf

University of British Columbia

- 2017 Review: https://ctlt2013.sites.olt.ubc.ca/files/2017/03/External-Review-Committee-Report.pdf

Elon University

- 2011 Review: https://www.elon.edu/docs/e-web/academics/teaching/External%20Review%20CATL%20Elon%20University%202011.pdf

Illinois State University

- 2016 Review: https://provost.illinoisstate.edu/downloads/centers/CENTERCTLT1722.pdf

Response Reports

University of Waterloo

- Visit the "About" tab for the Centre for Teaching Excellence to find the 2018 response report: https://uwaterloo.ca/cte/annual-reports-external-review

Simon Fraser University

- 2007 Response report: https://www.sfu.ca/content/dam/sfu/vpacademic/files/vp_academic_docs/pdfs/LIDC_RespSum.pdf

University of British Columbia

- 2017 Response to the external review: https://ctlt2013.sites.olt.ubc.ca/files/2017/03/CTLT-Response-to-External-Review-Report.pdf

Appendix C: Sample Site-Visit Schedules

Example A: Schedule for a day-and-half site visit

Day 1	Item	Details
9:00 to 9:30	Meet and greet	The Centre team will provide a short overview/meet with Review's sponsor
9:30 to 10:00	Review committee alone	Discuss the key areas of interest, identify what they want to find out and ask
10:00 to 11:00	Focus group 1	The representation in the focus groups will be dependent on local context but may include: • TAs • Faculty • Key partners • Senior administrators
11:00 to 12:00	Focus group 2	
12:00 to 1:00	Lunch	With stakeholders, director or senior administrator responsible for the review
1:00 to 2:00	Focus group 3	
2:00 to 3:00	Focus group 4	
3:00 to 4:00	Re-meet with the Centre's team	

Day 2	Item	Details
9:00 to 12:00	Review Committee	Review previous day and identify the content of the report and any outstanding questions. During this time, the Centre team will be available to answer questions or locate information.
12:00	Lunch & depart	

Example B: Schedule for a two-and a-half day visit

Day 1	Item	Details
5:00	Arrival	Pick up reviewers at the hotel and escort them to dinner
6:00	Dinner	With senior administrator and Centre director to discuss the review

Day 2	Item	Details
8:00	Arrival at campus	Pick up reviewers at the hotel and escort them to the campus or meet them at an entrance
8:30 to 9:00	Meeting with senior administrator	Note-taker to begin taking notes
9:00 to 10:00	Centre tour & meeting	Tour of the Centre and meeting with director and associate director
10:00 to 10:15	Break	
10:15 to 11:00	Meeting with Centre team	As a group or individually
11.00 to 11.30 11.30 to 12.00	Meeting with sub-team from Centre	As relevant to the particular Centre's work, e.g., Curriculum, SoTL, Teaching Assistants, etc.

Day 2	Item	Details
12:00 to 12:30	Lunch for reviewers	Prior to the following lunch meeting
12:30 to 1:30	Lunch with faculty members/stakeholders	
1:30 to 2:30	Meet with partners	e.g., Librarians/or Information Technology
2:30 to 3:00	Meeting with sub-team from Centre	
3:00 to 3:15	Break	
3:15 to 4:00	Meet with senior administrator(s)	e.g., Graduate & Postdoctoral Studies
4:00 to 4:30	Meet with graduate students	
4:30 to 5:00	Meet with sub-team from Centre	
5:00	Return to hotel	
6:30	Dinner	Opportunity for reviewers to debrief

Day 3	Item	Details
8:45	Arrival at campus	Pick up reviewers at the hotel and escort them to the site or meet them at an entrance
9:00 to 9:30	Meet with provost & vice-president	
9:30 to 10:30	Meet with deans/ associate deans/chairs	
10:30 to 11:00	Break	
11:00 to 11:30	Meet with Student Services	e.g., Student Experience Team/Student Life
11:30 to 12:30	Meet with Centre advisory board members	
12:30 to 12:45	Break	
12:45 to 2:00	Final meeting and lunch with senior administrator	i.e., administrator responsible for review, and Centre director
2:00 to 4:00	Reviewers meet to write report	
4:30	Transportation arrives for reviewers to leave	

Appendix D: Additional Resources

Beach, A. L., Kalish, A., DeZure, D. (2013, November). *Successful external reviews: A comprehensive planning workshop*. Workshop presented at the Professional and Organizational Development Network annual conference, Pittsburgh, PA.

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