There are many steps involved in program review at Cal Poly. Though no step is more critical than the work, reflection, and dialog surrounding the self-study, Academic Programs and Planning (“APP”) is providing the list below to help the department navigate the many steps involved in the process.

* All items noted in the blue font can be downloaded from Cal Poly’s [Academic Program Review website](https://academicprograms.calpoly.edu/program-review-documents).
* Once you know the site visit dates, you will need to calculate the deadlines for the self-study revision process.

| **Completed** | **Year** | **Quarter** | **Item** |
| --- | --- | --- | --- |
| **Year 1** | | | **Self-Study Phase** |
|  | 1 | Summer – Fall | The department is notified via letter (from the Provost) that the program will be entering a program review. |
|  | 1 | Summer – Fall | The department downloads the self-study and appendices templates from the SharePoint Professional Learning Community or APP website. |
|  | 1 | Fall | The program should discuss the review at its annual faculty retreat.  When it is known, the program should provide the date of the retreat to APP so the supplement can be provided in time for the retreat. |
|  | 1 | Fall | The department begins working on its self-study. Look at this as a year of engagement.   * Because a meaningful self-study should integrate the experiences and expertise of all program faculty, and will guide program decision-making over the next several years, it is important to engage faculty in an authentic way in this process. * Data should be discussed with faculty. What does the data say? * This process will continue for the academic year.   Note: The self-study report draft is completed approximately 10 weeks before the site visit (see below). |
|  | 1 | Fall | The program leaders and the Associate Dean should participate in program review orientation meetings with APP to discuss the overall process and preparation for the self-study phase. |
|  | 1 | Fall | If the program is accredited:   * Orientation will involve a separate meeting.   + A supplement will be discussed at the meeting. * The program will then be provided with a Cal Poly supplement for preparation in addition to the accreditor’s self-study template. The supplement will cover items not covered by the accreditor. |
|  | 1 | Fall | The program leader will begin the collection of all materials needed to begin drafting the self-study report. |
|  | 1 | Fall-Spring | The program may participate in program review learning communities with members of APP. These meetings take place approximately every 3-4 weeks throughout the academic year, and will progress through and provide guidance on the different sections of the appropriate report template. |
|  | 1 | Spring | The final PLC meeting of year 1 will focus on orientation to the site visit phase. |
| **Year 2** | | | **Site Visit Phase** |
|  | 2 | Fall | Fall annual faculty retreat planning suggestions:   1. The department creates a potential list of reviewers and completes reviewer nomination forms. 2. Three potential site visit dates are selected and sent to APP for consideration.   Note:  Visits typically include two external reviewers (outside Cal Poly) and one internal reviewer (inside Cal Poly but outside the college of the program under review). Programs may also choose to invite a team of three external reviewers.  The department’s potential nominees should include at least four external and two internal options. If inviting three external reviewers, please suggest six potential nominees.  **If an accredited program**, an internal reviewer is not required. |
|  | 2 | Fall | In collaboration with the Dean’s office and the review team, the department proposes **three potential site visit dates** and submits them to APP for final approval.   * Site visits typically occur between November and March. * Note: due to the number of individuals involved in the site visit entrance and exit meetings, it is important to try to select dates **as early as possible**. |
|  | 2 | Fall | When finalizing dates for the site visit, the department determines the availability of the Dean for entrance and exit meetings, and APP determines the availability of the Provost (see further details below). |
|  | 2 | Fall | Once the site visit dates are finalized, the department consults with the Dean’s office to arrange for stipends, travel, lodging, etc.  **Note:** All costs associated with the site visit are the responsibility of the department/college. |
|  | 2 | Fall | The Dean’s office selects the review team from the nominees.   * The department submits reviewer nomination forms to the Dean’s office. * The Dean’s office makes the final selection. * The final nomination forms are sent to APP once approved by the Dean’s office (via email to Angela Standifer [astandif@calpoly.edu](mailto:astandif@calpoly.edu)). |
|  | 2 | Fall | In collaboration with the Dean’s office, the department develops a draft itinerary for the site visit.   * A sample site visit schedule can be found on the program review website. * The itinerary is reviewed and approved by APP before being finalized. |
|  | 2 | Fall | The department submits an *initial draft* of the self-study to the Associate Dean, at least **ten (10) weeks before the site visit**.  ~ 2 weeks later, the department receives feedback and revises the initial draft as appropriate. |
|  | 2 | Fall | After incorporating the feedback of the Associate Dean, the department submits a *revised* *draft* of the self-study to APP, and the Office of Graduate Education (as applicable) at least **eight (8) weeks before the site visit**.  ~ 2 weeks later the department receives feedback and revises the 2nd draft as appropriate. |
|  | 2 | Fall | After incorporating APP feedback, the department submits a *final draft* of the self-study to the Associate Dean, APP, and Graduate Education (as applicable) approximately **four (4) weeks before the site visit**. |
|  | 2 | Winter | Approximately 3 weeks before the visit, APP sends the review team the final draft of the self-study (and supplement, if applicable) along with a formal welcome letter and reviewer guidelines.  Note: Accredited programs will send the self-study to the accreditor per its procedures. |
|  | | | The following are **mandatory** components of the site visit: |
|  | 2 | Winter | **Entrance meeting**: This should be the first formal meeting on day one (typically a 1-hour meeting around 9 a.m.). The meeting should be **scheduled in collaboration with APP** and should include the following participants:   * + 1. Dean     2. Associate Dean     3. Bruno Giberti, Associate Vice Provost for Academic Programs & Planning     4. Elizabeth Lowham, Dean of Graduate Education (as applicable)     5. Review team |
|  | 2 | Winter | **Exit meeting**: To best accommodate the Provost’s schedule, ***APP schedules this meeting*** when the site visit dates are initially determined. This meeting occurs at the end of day two and should include the following participants:   * + 1. Provost     2. Dean     3. Associate Dean     4. Bruno Giberti     5. Elizabeth Lowham (as applicable)     6. Review Team |
|  | 2 | Winter | **Departmental report out**: Typically, this immediately follows or precedes the exit meeting and includes the following participants:   1. Review team 2. Department Head/Chair 3. Faculty 4. Staff |
|  | | | The following are **recommended** components of the site visit: |
|  | 2 | Winter | Meeting with the department head/chair  Meeting(s) with tenure-line faculty  Meeting with lecturers (full or part-time)  Meeting with staff  Meeting with students  Tour of facilities, equipment, and information resources significant to the program (i.e. labs, smart rooms, student space, library, etc.)  Meals with individual stakeholders. Note: Depending on schedules, meals may be a supplement or substitute for meetings above.  Time for reviewers to confer with one another, work on their report, or complete the necessary paperwork for stipends and reimbursement  Display or presentation of student work  Other meetings as requested by the review team or accrediting agencies (as applicable) |
|  | | | Additional factors to **consider** when developing your itinerary: |
|  | 2 | Winter | The review team should arrive the night before the site visit begins.  The site visit should be planned for two full workdays to make for a better schedule — full, but manageable. Flight times permitting, reviewers can be taken to the airport at the end of the second day.  Meetings should be scheduled on Cal Poly time (i.e., start at ten minutes after the hour) since participants may be coming from a class or another meeting.  If the numbers permit, meetings with the faculty may be scheduled by rank (i.e., tenured and tenure-track). Remember to include lecturers in the process.  Meetings with stakeholders should not include participants who might inhibit honest conversation (i.e., instructors at student meetings, chairs/heads at staff meetings, and tenured faculty at tenure-track faculty meetings).  Lunch and dinner should be seen as opportunities for the review team to meet with small groups of stakeholders. |
|  | 2 | Winter | Once completed, the department submits the draft itinerary to APP for approval and confirmation of the entrance and exit meetings.  The department shares a copy with the Dean’s office. |
|  | 2 | Winter | Once finalized, the department reserves meeting spaces and adds locations to the itinerary. |
|  | 2 | Winter | Approximately **two (2) weeks before the visit**, the department emails the final itinerary to the review team, the Dean’s office, APP, and Graduate Education (as applicable). |
|  | 2 | Winter | The department shares the itinerary with the faculty, staff, students, and other relevant stakeholders. |
|  | 2 | Winter | The site visit takes place over 2 days (typically).  **From: Click to Enter Date To: Click to Enter Date** |
|  | 2 | Winter | Following the site visit: APP will communicate thank-you and instructional emails to the reviewers. |
|  | | | **Site Visit Reviewer Report** |
|  | 2 | Winter | Within one month of the site visit, the review team submits its initial report to APP. |
|  | 2 | Winter | APP sends the initial report to the department head/chair and the Associate Dean for a review for factual errors.  Typically: ~2 weeks to conduct this review. |
|  | 2 | Winter | The department head/chair notifies APP that no errors were found, or they submit suggested revisions and/or clarification questions to APP.   * If no factual errors are found, the report is declared final. |
|  | 2 | Winter | APP notifies the review team of any suggested revisions and/or questions and requests a response within two weeks. The review team has discretion as to whether or not to incorporate the department’s suggested corrections.  Note: APP may make editorial corrections without notifying the reviewers. |
|  | 2 | Winter | APP sends a final copy of the reviewer report to the Dean, the Associate Dean, and the department head/chair. |
|  | 2 | Winter | APP notifies the review team that their responsibilities have been met and sends thank you letters on behalf of the University. |
|  | 2 | Winter | The department ensures that reviewer stipends are processed ASAP after the report is declared final. |
|  | | | **Action Planning Phase** |
|  | 2 | Winter | Following receipt of the finalized reviewer report, APP will schedule a debrief meeting with the AD, head/chair, and others to discuss the outcome of the site visit and explain the action planning process. |
|  | 2 | Winter | The department develops a draft action plan and schedules an action plan meeting. |
|  | 2 | Spring | The action plan meeting is typically held during a regularly scheduled faculty meeting. It is best to get it **scheduled with APP as soon as possible** – even though the action plan is still being developed.  The meeting should include the following participants:   * + - Dean     - Associate Dean(s)     - Bruno Giberti     - Elizabeth Lowham (as applicable)     - Department chair, faculty and staff as appropriate |
|  | 2 | Spring | After receiving input from the Dean and others in attendance at the action plan meeting, the department finalizes their action plan and submits a copy to APP. |
|  | 2 | Spring | The department implements the action plan and revisits/updates it annually. |