

Guidelines Regarding Comprehensive Evaluation Logistics

These guidelines include descriptive and prescriptive information about the self-study report, transportation, accommodations, documentation, and time lines.

Self-Study Report

Length

The maximum length of the section on General Institutional Standards 1–8 is 75 pages. In addition, analysis of each degree program standard should be eight to 10 pages, addressing sections 1–4 of each degree program. The length of ES, the educational standard, will vary depending upon whether the school has one or more extension sites and whether it offers distance education.

Line Spacing and Format

Please single-space the report and print it double sided. In addition to the title and name of the institution, please include on the cover page, the date (year and month) of the visit. In addition to print copies, the Board of Commissioners requires that the self-study report and appendices also be available to the Commission, Commissioners, and comprehensive evaluation committee members electronically.

Distribution

Schools hosting an evaluation visit for reaffirmation of accreditation must distribute the following materials as described here (schools hosting a visit for *initial* accreditation submit materials to the Commission office by April 1 and December 1):

- 60 days before the visit, send these four items to the Commission office:
 - Two coil-bound, double-sided copies of the self-study report (without appendices), with the report typically not exceeding 150 pages
 - Two duplicate USB flash drives, each with two PDF files: the self-study report **and** appendices (with all appendices combined into one PDF file and bookmarked; see “Materials to Accompany the Self-Study” later in this document)

- 45 days before the visit, send these two items to **each** member of the evaluation committee:
 - One coil-bound, doubled-sided copy of the self-study report (without appendices), with reports typically not exceeding 150 pages
 - One USB flash drive, with two PDF files: the self-study report **and** appendices (with all appendices combined into one PDF file and bookmarked; see “Materials to Accompany the Self-Study” later in this document)

NOTE: Each printed self-study report should have a table of contents that clearly labels each section with page references. Each electronic set of appendices should be bookmarked (a feature of PDF files), so each section is easy to access.

Institutions that are dually accredited and receive permission from Commission staff to host a joint or coordinated visit should note that some regional accrediting agencies have different timetables for distributing self-study materials, and those timetables for that other agency must also be followed.

Please see the section on documentation later in these guidelines for information regarding the additional, supporting documentation for the evaluation that will need to be gathered and made available.

The Evaluation Committee

The school will receive the final roster of evaluators approximately three months prior to the evaluation.

Transportation

The chair of the committee and the accrediting staff member who will participate in the evaluation and the school will reach a consensus on the provision of transportation for the committee, from the airport upon arrival, during the evaluation, and to the airport for departure. Committee members and accrediting staff will make their own plane reservations and inform the school of their plans but will submit those expenses for reimbursement to the ATS Commission office, not to the school.

Accommodations

In making arrangements for lodging, schools should be mindful that committee members have a great deal of work to accomplish in a very short period of time. The school's efforts to provide gracious hosting and comfortable housing will facilitate this work. Well in advance of the evaluation, the school should arrange for single room accommodations for committee members and staff at a comfortable, nearby hotel. Hotel rooms should have desks and adequate space for the committee member to work and relax. It is common for the school to provide a small hospitality basket in each committee member's hotel room. If possible, the hotel should have restaurant service, which is where the committee usually eats breakfast. Committees typically request recommendations for local restaurants for evening meals on the second and third days, which (unlike all other meals during the visit) are paid by staff and later charged back to the school as part of the end-of-semester invoice for the visit fee. Schools usually need to arrange transportation to any local restaurants for the committee, unless other arrangements are made with staff or the chair. Noon meals are usually provided by the school on campus while the committee meets with students (first full day) and trustees (second full day). The opening dinner (evening before the first full day) is hosted by the school at a place of its choice (on campus or at a nearby restaurant).

Typically, the school should reserve rooms for three nights for a comprehensive evaluation and one or two nights for a focused evaluation. Occasionally, an evaluator may require a fourth night's accommodation for a comprehensive evaluation because of distance or time zone changes or to obtain reduced airfare. Schools are not responsible for more than four nights of lodging for any evaluator. The school should arrange to be billed directly by the hotel for the costs of rooms and any meals (usually breakfasts) eaten at the hotel. Schools are not responsible for other personal, incidental expenses of committee members or accrediting staff (e.g., long distance calls, laundry, etc.).

The school should arrange meeting and work space for the committee, both at the hotel and on campus, and should review the details with the chair and accrediting staff. The hotel meeting room could be the sitting area of a suite, if it is of sufficient size to provide comfortable work space for the committee, or a separate meeting room in the hotel. Committees will typically use the hotel meeting space several

hours on the opening day of the evaluation and possibly late afternoons and evenings each of the two full days of the evaluation.

The school should also provide an office or workroom on the campus for the exclusive use of the committee. This space should be large enough to accommodate both full committee meetings and individual work space. It should also serve as the Documents Room, containing the documents, records, exhibits, and supporting material referenced in the self-study and described in the following section. The workroom should have one or two computers, Internet access, a projector, and a printer. The room should also be secure with keys provided, if possible, to committee members since they typically leave personal items in that room. The school should also provide each day in that room simple amenities such as coffee, tea, juice, bottled water, ice, and snacks (chips, cookies, nuts, fruit) for use by the committee while it is on campus.

Documentation

The school is responsible for distributing copies of the self-study report, appendices, and all related material to the Commission office and members of the accreditation evaluation committee. Information about preparation and distribution of the self-study appears at the beginning of these guidelines. A copy of the self-study and documentation sent to the Commission on Accrediting and evaluation committee members should also be placed in the Documents Room.

Historically, schools undergoing comprehensive (or initial) evaluation have been required to provide paper copies of various documents in a Documents Room. Those documents were in printed form and physically located in a secure room on campus for the evaluation committee's review while on campus. Increasingly, schools are asking if some or all of those documents could be provided instead electronically in what might be called a "Virtual Documents Room." A Virtual Documents Room is acceptable, provided these five conditions are met: (1) the electronic documents are clearly organized according to the Commission Standards and appropriately referenced in the self-study report; (2) the electronic documents are clearly labeled and easily accessed without any undue difficulty; (3) the school still provides a physical Documents Room for certain documents that are not easily shared electronically (e.g., faculty publications, student dissertations, printed promotional materials, etc.); (4) the physical Documents

Room has a dedicated computer and printer that allows committee members to view and print one or more documents as needed to do their work well; and (5) the evaluation committee still has the option of requesting before the visit one or more documents be printed for its review. Please keep in mind that all schools are still required to submit a USB flash drive that contains electronic versions of those supporting materials to accompany the self-study that are listed below. Schools desiring to have a Virtual Documents Room should consult early on with their ATS Commission staff liaison, preferably at least six months before the visit.

Materials to Accompany the Self-Study

While a school may include in its self-study report hyperlinks to a number of supporting documents, certain supporting materials **must** be included in the appendices to the self-study report (formatted as a single PDF file on a flash drive with each item in that single file bookmarked; see “Distribution” discussion above). Items that must be included in the appendices to the self-study report are listed below and are the only items that should be included as appendices. In addition, certain other items (see second list below) **must** be provided in the Documents Room (see preceding discussion regarding physical vs. virtual documents rooms). If there is any question as to what to include in any of these materials or how to format them, please contact the school’s ATS accrediting staff liaison.

Items to Include in the Appendices to the Self-Study Report (which must be combined into a single PDF file and bookmarked):

- Current organizational chart, showing names and titles of all key administrative personnel
- Current strategic plan
- Assessment plan (analysis of assessment results should be incorporated into the self-study report; current assessment instruments and results should be provided in the Documents Room per the instructions below)
- Current budget (if embedded school, include budget for theological unit/entity) and a three- to five-year budget plan (per Standard 8, section 8.2.2.4)

- Most recent fiscal year audit and management letter
- Handbooks: Board, faculty, staff, and student
- Academic catalog (schools may use terms other than *catalog*, but there must be some public and permanent document that communicates clearly all appropriate academic policies and requirements, especially those described in Standard 2, sections 2.3 and 2.9; and Standard 6, sections 6.2.1, 6.3.1, 6.3.5, and 6.3.6, including any required by federal or provincial regulations)
- Targeted Issues Checklist (a copy with the schools' portion completed)

Items to Provide in the Documents Room

In addition to a copy of the self-study and supplementary materials sent in advance, the Documents Room should contain the following:

- Minutes of governing board and faculty meetings for last five years
- Audited financial statements with management letters for the three years prior to the most recent ones provided in advance, including A-133 audits (if conducted)
- Annual Report Forms for last two years
- Most recent Strategic Information Report (published every other year and covering 10 years of data); if the school participates in any of the following, please also include the last three years of the Institutional Peer Profile Report, Entering Student Questionnaire, Graduating Student Questionnaire, and Alumni/ae Questionnaire
- Current institutional planning documents (strategic planning to include enrollment, financial, and development plans/goals)
- Syllabi (include representative samples of courses taught in every program by various faculty, as well as samples of courses taught in every delivery format [e.g., traditional, intensive, off-campus, online, etc.])
- Current faculty CVs and access to transcripts showing advanced degrees
- Samples of faculty publications
- Samples of student theses
- Copy of promotional materials

- Current assessment instruments and results for each degree program for the last three to five years
- Graduation rates, average length of time to complete the program, and placements (by degree program) in degree-related careers for last five years (if not in self-study)
- Library collection development plan
- Copy of the most recent evaluation visit report by another accrediting agency (US Schools) or provincial agency (some Canadian schools)
- Targeted Issues Checklist (in addition to appending a completed copy of this checklist to the self-study report as noted above, schools must also place all appropriate documentation called for by the checklist in the Documents Room in a separate file marked “Targeted Issues” and organized by each numbered item on the checklist, following instructions found there)

Time Lines

Before the Evaluation

Two years before the academic year in which the comprehensive evaluation visit is scheduled: invitation to the annual self-study workshop.

One year out: Consultation with the chief administrative officer about the date of the evaluation, including visits to extension sites.

Six to nine months out: consultation with the chief administrative officer about the appointment of the comprehensive evaluation committee.

As soon as the evaluation committee is formed: School receives committee roster together with directions on soliciting information regarding travel arrangements and other preferences.

After the Evaluation

Two weeks later: School receives draft of report and recommendations from the chair.

Two weeks following: School returns draft to chair with factual corrections.

Less than one week following: Chair delivers final report with recommendations to Commission, and accrediting staff sends final report with recommendations to the school's chief administrative officer.

Within four weeks (of receiving the draft report): School responds to the report, directing its remarks to the Board of Commissioners. The school may also choose to address the Board in person at its regularly scheduled meeting, providing the school a total of at least eight weeks to formulate a response.

After the Meeting of the Board of Commissioners

After the meeting of the Board of Commissioners in which the self-study, evaluation committee report and recommendations, and the school's response are considered:

Within 30 days: School receives the action letter from the Board of Commissioners.

Within 30 days of receipt of the action letter: Deadline for appealing certain actions, including failure to approve new degrees, extension sites, or distance education programs; the imposition of a notation or probation; or an adverse action.

At the conclusion, the Board of Commissioners will request of the school an evaluation of all aspects of the self-study process, the evaluation, and the Board's action.