Preparing the Self Study: Practical Tips for a Successful Experience
Georgana Taggart and Maggie Davis

1. **Two Rules:**
   1.1. If the process is to be collaborative, you need A LOT MORE TIME than you think
   1.2. If you expect people to participate, whenever possible SUPPLY FOOD

2. **Getting Organized:**
   2.1. Establish a **Steering Committee** that is representative of the whole college community
       2.1.1. As early as practical
       2.1.2. Stay on task
       2.1.3. Organize the Steering Committee around the Five Criteria (one Chair for each criterion), with one additional person to chair
       2.1.4. Try to get someone who assisted in previous accreditation process on the Steering Committee
       2.1.5. Add Directors of Institutional Communications, Writing Center, Library (Resource Room organizer)
   2.2. Establish Criterion Subcommittees
       2.2.1. Develop “job description” for Criterion subcommittee members (see attachment)
       2.2.2. Example of organization of Subcommittee attached
       2.2.3. Each **Criterion Subcommittee** organized itself in the way it felt it could best gather its data and write its portion of the Self Study – faculty and staff were invited to serve on committees (students were included in the process through our Student Government Association)
       2.2.4. Met about five times; much of communication was done via email.
       2.2.5. One member serves as secretary to take meeting minutes.
       2.2.6. Each member had a responsibility for the Criterion Town Meeting
       2.2.7. Discussion/decisions about what focus for Town Meeting and how to accomplish goals
2.2.8. Create forms to make data collection uniform

2.3. Criterion Subcommittee Chair’s responsibilities:

2.3.1. Identify and recruit subcommittee

2.3.2. Organize and chair subcommittee meetings

2.3.3. Plan and execute town hall meeting

2.3.4. Gather and collate data from town hall meeting

2.3.5. Attend and participate in steering committee meetings

2.3.6. Determine what documents/evidence exists appropriate to the assigned criterion.

2.3.7. Identify where that documentation is or from whom it can be procured.

2.3.8. Outline and draft criterion report.

2.3.9. Revise, rewrite, revise, rewrite......

2.4. Take time to play

2.5. Celebrate the completion of various milestones

3. **Resources**


3.2. Copy of previous site team report, any follow-up reports, etc.

3.3. HLC Website has guidelines, forms and samples

3.4. Note timeline and requirements for submitting documents

4. **Budget**

4.1. Printing Self Study

4.2. Hosting team

4.3. Steering Committee meetings

4.4. Town Meetings
4.5. Expenses of data gathering

4.6. Marketing

4.7. Consultant expenses

4.8. Overestimate your needs

5. **Use Institution’s Website**
   5.1. [http://inside.msj.edu/academics/hlc](http://inside.msj.edu/academics/hlc)

   5.2. Included minutes from Steering Committee meetings

   5.3. Summaries of feedback from Town Meetings

   5.4. Links to surveys and survey results

   5.5. Self Study

   5.6. Self Study Executive Summary

6. **Have a Theme:**
   6.1. Connect to the persona of your institution or something easy to incorporate – movies

   6.2. January: Criterion One, Mission and Integrity, “Mission: Possible” - Your Mission Should You Decide To Accept It; [picture] This is the motherhouse auditorium; You will find an open door near the grey pillars in this picture; This is the main entrance at the end of Delhi Rd., There is also a side entrance with a green handrail, As you enter utter the phrase “I’m with the college” - This will allow you to proceed to the rendezvous point - Arrive at 4pm, eat free munchies, talk with others about the mount mission - How are we doing in living the mission? What do we do well? Where do we need to grow? What has been YOUR experience? At 5pm we will not self destruct but adjourn . . .

   February: Criterion Two, Preparing for the Future, “Back to the Future” .... Take a ride with us and time-travel to the Mount's past and future! We need to pool our energy and we need at least a gigawatt! So please come Back to the Future…… Hop in the DeLorean and switch on the flux capacitor! We're going back to the future of the Mount! Meet us at the Twin Pines Mall (Corona Room).

   6.3. March – Criterion Three, Student Learning And Effective Teaching – “Learning: The Heart of It All!”
6.4. April – Criterion Four, Acquisition, Discovery and Application of Knowledge - "It's a Wonderful Life... of Learning"

7. **Collecting Data:**
   7.1. Program review
      
      7.1.1. Three years prior to completing SS draft
      
      7.1.2. Aligning Program Review criteria with the HLC criteria
      
      7.1.3. See appendix to paper for questions
   
   7.2. Town meetings - included faculty, staff, students, and food
   
   7.3. Surveys
   
   7.4. Existing college organizations (i.e. Mission and Social Concerns)
   
   7.5. Exiting data (i.e minutes and annual reports)
   
   7.6. “Experimental” Town Meeting – Criterion Five, Engagement and Service (see attachment)
   
   7.7. Identify community stakeholders to include
   
   7.8. Request information from committees, etc., early in the process

8. **Drafting and Printing the Self Study:**
   8.1. Subcommittees drafted each assigned Criterion
   
   8.2. Need a drafter for the Introduction and Conclusion
   
   8.3. Draft Introduction and Conclusion last
   
   8.4. Make it introspective
   
   8.5. ID strengths, challenges, what needs to be done
   
   8.6. Make it a transparent process/document
   
   8.7. Give examples of hard evidence
   
   8.8. Create Self-recommendations
8.9. Watch out for duplication – decide where to discuss an issue and reference it in other sections

8.10. Use the HLC process as an opportunity for strategic planning

8.11. Have Consultant help

8.11.1. Within the institution

8.11.2. Outside Consultant who is familiar with accreditation process

8.11.2.1. Meet with Steering Committee

8.11.2.2. Meet with constituencies within the college

8.11.2.3. Review Self Study draft

8.12. Use one editor to ensure consistency and to check for apparently conflicting statements

8.13. Be consistent with names of events or documents

8.14. Use a proofreader

8.15. Have each criterion subcommittee prepare an outline prior to drafting and compare outlines to avoid duplication

8.16. Do majority of drafting when school is not in session

8.17. Use college style sheet – or develop one

8.18. Should sound as though only one person wrote it

8.19. Use graphics department to do page set-up and pictures, if any

8.20. Develop Glossary, list of appendices, and Resource Room documents, while drafting the Self Study

8.21. Glossary should address terms not generally known, such as President’s Cabinet

8.22. Don’t abbreviate or use acronyms (i.e. NSSE for National Survey of Student Engagement)

8.23. Mirror the terms used in the Criteria and Core Components
8.24. Use wide margins

8.25. Bind Self Study so that it will lie flat

8.26. Place list of resources at the end of each section; include links for online version; make sure links work

8.27. Draft an Executive Summary

9. **Reviewing:**

9.1. Print review drafts in 1.5 space format – makes doc more easily read for review

9.2. Have reviewers start with different sections each time – less attention given to C5

9.3. Spend some time – whole days – reviewing together

9.4. Make hard copies, to have same page numbers, better able to collate revisions

9.5. Submit to college community twice

9.6. Different opportunities for feedback

  9.6.1. Electronic - HLCFeedback@mail.msj.edu - all Steering Committee members had access

  9.6.2. Feedback open sessions (face-to-face)

9.7. Used President’s Cabinet for review

9.8. Begin reviews of with different sections – otherwise you’ll run out of steam before the 4th and 5th criteria

9.9. Leave LOADS OF TIME for refining, tracking down bits of information, clarifying, tying up loose ends, etc.

9.10. The more refining you can do pre-printing, the faster the print job will be

10. **The Resource Room:**

10.1. Use one person to organize (librarian)

10.2. Set up by criterion, and core components, duplicate where practical

10.3. Use file cabinets and bookcases
10.4. Use binders for documents such as committee minutes

10.5. Confirm how many years of minutes, etc. are needed

10.6. Room must lock

10.7. Include food: coffee, tea, water, soft drinks, fruit, cookies, and energy bars

10.8. Include supplies, such as paper, pens, pencils, notepads, and stapler

10.9. See attachment for list of supplies from technology department

10.10. Phone with important phone numbers beside it

10.11. Create accounts for team members when they arrive

11. **Marketing the Self Study and Team Visit:**

11.1. Took advantage of the movie theme

11.2. Used email, plus posters, and table tents (see attached language)

11.3. Open meetings

11.4. Put Self Study on Web

11.5. Make hard copies of Self Study available in college departments and in the library

11.6. Distribute Executive Summary of Self Study

11.7. Steering Committee met with Board of Trustees

11.8. Articles in alumni newsletter and student newspaper

11.9. Third party comment

11.10. Encourage people to read the Self Study through a contest

11.10.1. Mission Possible Challenge (see attachments)

11.11. Use reminders, but don’t nag

11.11.1. "Elementary, my dear Watson." The answer to today’s puzzle will be so easy to find that you will probably declare it to be elementary. And
the re-accreditation process is no mystery as well. All you need to do is get familiar with the Self Study and participate in one of the open meetings with our team of site visitors. Dates, times and locations will be announced soon.

11.11.2. "After all, tomorrow is another day." Tomorrow is another day, but it is also the LAST DAY you have to take the Mission Possible Challenge and be eligible for some great prizes. Later today, we will post the status of those who have taken the Challenge.

11.11.3. “Carpe diem. Seize the day, boys.” This is it – the very last day to seize the moment and take the Mission Possible Challenge. Remember: you are competing for the opportunity to be entered in a drawing for some really nice prizes.

11.11.4. “You’ve got to ask yourself one question: ‘Do I feel lucky?’” - For those of you who took the Mission Possible Challenge – tomorrow is your lucky day.

11.11.5. "They’re here!” - Well, they’re almost here – our Site Visit Team, that is. We are confident that you have been reviewing the Self Study and related documents and that you’re planning to attend the open meeting with them. Here is the schedule: . . .

11.11.6. “Wait a minute, wait a minute. You ain’t heard nothin’ yet.” - This is the day that our visitors need to hear from you! Be sure to attend your open meeting with them. It is the most important thing you can do for the Mount, as part of the re-accreditation process. Here is the meeting schedule:

11.11.7. “May the Force Be With You.” - A big thanks to all of you who have attended and will be attending meetings with our Site Visitors. Their report, together with our Self Study self recommendations, will help to shape the Mount’s future. Your input is a valuable part of that process.

11.12. Prize day
11.12.1. Just before Site Visit

11.12.2. Distribute cards with list of times and locations for open meetings – use college pins

11.12.3. Students ran popcorn machine

11.12.4. Leading Ladies and Gentlemen -- for the most successful in solving all 10 Mission Possible Challenges
11.12.5. Supporting Cast Members – most knowledgeable in identifying all 10 Movie Trivia Challenges

11.12.6. Key Grips – they faced the challenge head on and participated in the production of Mission Possible Challenge (and got at least one answer right)! They will receive a participation prize!

11.13. Meet with Faculty Assembly, Administrative Assembly and Student Government Association just before the visit – encourage attendance and candor

12. **Hosting the Site Visit**

12.1. Give plenty of advance notice to college community – need everyone on campus and available

12.2. Reserve Resource Room - a room on campus that can be locked and has Internet access and enough electrical outlets to support computers, printer, fridge, etc.

12.3. Try to set up student meetings with team during lunch time

12.4. Work with Team Chair concerning travel, lodging arrangements, and schedule

12.5. Give team members directions to and from airport and between lodging and college

12.6. Provide the team with campus maps

12.7. Reserve parking spaces for team and secure visitor passes, if needed

12.8. Check special accommodation needs of team members (i.e. disability or dietary)

12.9. Create a master schedule for the team members

12.10. Identify team members’ comfort levels/preferences as to amount of information they want to have electronically or hard copy

12.11. People meeting with team should supply business cards

12.12. Create master schedule for team

13. **After the Site Visit:**

13.1. Thank campus community
13.2. Give campus community information about next steps

13.3. Celebrate

13.3.1. and the award for the best supporting cast goes to . . . You! You did it! You gave an award-winning performance! The result was re-accreditation for ten years. It's the Month for Oscars - a good time for us to celebrate. So please join us . . .

13.3.2. "Round up the usual suspects." It's time for the HLC Accreditation Celebration . . .

13.4. Hold a “post mortem” about two weeks after the Site Visit
Higher Learning Commission Criteria Subcommittees:

**Organization:** The Steering Committee consists of six members: I chair the committee. Each of the other five members chairs a subcommittee that will address one of the Higher Learning Commission’s criteria for accreditation. The criteria and their chairs and Focus Months are:

<table>
<thead>
<tr>
<th>Criterion</th>
<th>Title - Description</th>
<th>Chair</th>
<th>Focus Month</th>
</tr>
</thead>
<tbody>
<tr>
<td>One</td>
<td>Mission and Integrity</td>
<td></td>
<td>January, 2005</td>
</tr>
<tr>
<td></td>
<td>The organization operates with integrity to ensure the fulfillment of its mission through structures and processes that involve the board, administration, faculty, staff, and students.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Two</td>
<td>Preparing for the Future</td>
<td></td>
<td>February, 2005</td>
</tr>
<tr>
<td></td>
<td>The organization’s allocation of resources and its processes for evaluation and planning demonstrate its capacity to fulfill its mission, improve the quality of its education, and respond to future challenges and opportunities.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Three</td>
<td>Student Learning and Effective Teaching</td>
<td></td>
<td>March, 2005</td>
</tr>
<tr>
<td></td>
<td>The organization provides evidence of student learning and teaching effectiveness that demonstrates it is fulfilling its educational mission.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Four</td>
<td>Acquisition, Discovery and Application of Knowledge</td>
<td></td>
<td>April, 2005</td>
</tr>
<tr>
<td></td>
<td>The organization promotes a life of learning for its faculty, administration, staff and students by fostering and supporting inquiry, creativity, practice, and social responsibility in ways consistent with its mission.</td>
<td></td>
<td></td>
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<tr>
<td>Five</td>
<td>Engagement and Service</td>
<td></td>
<td>May, 2005</td>
</tr>
<tr>
<td></td>
<td>As called for by its mission, the organization identifies its constituencies and serves them in ways both value.</td>
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**Subcommittee Meetings:** Subcommittee meetings will be negotiated among members; however, to the extent possible, they will be geared to happen during the Tuesday/Thursday, 11:30 am to 12:30 pm, time slots.

**Work of the Subcommittees:** Each subcommittee will focus on one of the five criteria for accreditation. It will assume responsibility for planning the data-gathering process, gathering the data and drafting the portion of self-study that addresses its particular criterion. This fall (‘04), subcommittees will be engaged in the planning phase of this process, which will include the events associated with its data collection (such as holding town meetings, having electronic discussions, writing the questions to be asked, etc.). Although each subcommittee will establish its own agenda, we envision that this process will probably require two or three meetings, with the work completed by November 15, 2004.

Data collection will occur during the Focus Month for the subcommittee’s criterion. Focus months are listed above.

**Writing the Self-Study:** One person from each subcommittee will write the self-study initial draft for that subcommittee’s criterion. The Steering Committee will develop guidelines to assist with this process and to ensure that all sections address the same key elements. The Higher Learning Commission has also provided useful information in its Handbook of Accreditation. Subcommittee drafts will be due six weeks following the end of the subcommittee’s Focus Month.
**Criterion 5 Subcommittee process:**

How to proceed in order to “eat the elephant one bite at a time.”

Overview of the purpose of criterion five, Engagement and Service

It was noted that criterion one defines the mission of the organization, and criterion five gives evidence of how the mission is carried out – invite Chair of Criterion One Subcommittee to a meeting

Define college constituencies as a starting point and synthesize down to the ones that are the most important to the college - narrow the focus to the most vital constituencies and their expectations as a place to start.

Decide how we want to interact with them, and get our discussion points together for that

Questions to consider-

5a: Can or should we meet these expectations? Are we the most appropriate partner for these constituents? Evidence of the relationships?

5b: Do we have the capacity to serve constituents? Do we have a shared geography? Shared beliefs? Are the groups too large to serve? How are we connected?

5c: Do we serve the constituencies that must be served? We definitely will need to talk about transfer credit policies. Do our partnerships uphold our integrity? Are we building bridges among diverse communities?

5d: Demonstration of the value of services to internal & external constituencies. What do we do to serve the community? Do we take this seriously as a commitment?
Criterion 5 Town Meeting

This town meeting took place during lunch was held as part of Enrichment week. There were tables of mixed faculty, staff and students that were each assigned one core competency and the accompanying questions to brainstorm. Below are the questions each group was asked to address:

Identify ways in which your organization engages its constituencies and serves them effectively. Provide evidence of the ways in which external constituencies value the program’s services.

Core Component 5a. The organization learns from the constituencies it serves and analyzes its capacity to serve their needs and expectations.

   Who are the Mount’s external constituencies?
   What systems do we have in place to listen to our external constituencies and to discern their educational needs?
   What values do these relationships bring
       To the College
       To the community
   Does the Mount have the capacity to serve these constituencies? If not, where are the gaps?
   Have we included all of the constituencies that should be at the table?

Core Competency 5b. The organization has the capacity and the commitment to engage with its identified constituencies and communities.

   How is the Mount directly connecting student learning (curricular & co-curricular) with serving community needs?
   How do these experiences enrich student learning?
   What values do these experiences bring to the community?
   Do we have the capacity/resources to support these connections?

Core Competency 5c. The organization demonstrates its responsiveness to those constituencies that depend on it for service.

   What academic partnerships does the Mount have with the community?
   What value do these partnerships bring to the Mount?
   What values do they bring to the community?
   Are there areas of service that the Mount could respond to that we have not?

Core Competency 5d. Internal & external constituencies value the services the organization provides.

   What other services (excluding academic credit) are the Mount providing to the community?
   What value do these services bring?
       To the College
       To the Community
   Are we missing any opportunities for service?
Supplies from Technology Department:

The following will be available for use by the HLC Site Visit Team members:

- Notebook computers (qty. 5)
  o IBM Thinkpads
    ▪ Pentium M Processor 1.6 GHz
    ▪ 512 MB RAM
    ▪ CD/RW / DVD-ROM combo
  o Wireless connectivity to the College’s network and the Internet
  o Software Installed:
    ▪ Windows XP Professional
    ▪ Microsoft Office 2003
    ▪ Internet Explorer
    ▪ Adobe Reader

- USB Flash Drives (qty. 5)
  o Each flash drive holds 512 MB storage

- Blank CD/RWs will also be available for use

- Networked Printer (qty. 1)
  o The printer will be located in the Wolverton Conference Room
  o Two reams of extra paper will be provided.

- Copier (qty. 1)
  o The copier will be located in the Wolverton Conference Room

- Telephone (qty. 1)
  o The telephone will be located in the Wolverton Conference Room

- Each HLC Site Team member will have their own network account providing them the following:
  o Access to the College’s network and Internet
  o Access to the Networked Printer located in the Wolverton Conference Room

Documentation will be provided regarding the Login procedures
Posters and Tabletop Tents:

**Poster copy**

Coming Attraction:
MISSION POSSIBLE
Reaccreditation of the College of Mount St. Joseph in 2006

Starring:
Mount students, faculty and staff

Guest Appearance:
Visitors from the Higher Learning Commission

Special Showing:
February 6, 7, 8, 2006 campus visit by the Higher Learning Commission on campus
(We included dates and places for open meetings)
Check the Mount Web site for announcements of open meetings with the HLC Site Visit Team

Previews:
Enter to win great prizes!
Go to [http://inside.msj.edu/academics/hlc/missionpossible/](http://inside.msj.edu/academics/hlc/missionpossible/)

Reviews:
Read the Mount’s Self Study online at [http://inside.msj.edu/academics/hlc/](http://inside.msj.edu/academics/hlc/)
Mission Possible

Mission Possible Prize Day is Friday, February 3, 11:30 a.m. to 12:30 p.m. in Seton Lobby! Prize winners will be drawn at noon! Come and join the celebration!

Now playing…

Mission Possible Challenge

Starring…

Mount faculty, students and staff

Running…

January 17 - 30, 2006

Here’s how to participate…

Faculty, students and staff accept a mission to read the Institutional Self Study of the College of Mount St. Joseph.

Daily questions from the Self Study will be posted on this site for 10 days and each question includes a clue.

Answer all 10 questions correctly by midnight, January 31, 2006, and you will be entered in a drawing for these awards:

- Mount Lions Football Frenzy – reserved seats, parking and more!
- Mount Shopping Spree – Brand Store, Bookstore and more!
- Movie Madness – dinner, the movies and more!

In addition, faculty, staff and students who submit at least one correct answer will receive a Mount pin to show your school spirit!

And for fun, there will be a drawing for bonus prizes for everyone who answers all 10 movie trivia questions correctly!

Daily Questions & Answers [links to questions]

Presented by the Steering Committee, Institutional Self Study
Examples of Mission Challenge Questions:

**Question 1.** What did the Mount use for a formative measure in the first round of assessment of the six baccalaureate learning outcomes?

**Clue** See pages 3-15 in the Introduction of the Institutional Self Study

**Answer** IDS 100 Foundations Seminar

Page # of Self Study where you found the answer: 9

**Question 2.** Identify an event or activity in which the Mount continues to affirm its Catholic identity and Sister of Charity roots.

**Clue** Read pages 19-27 of Criterion One of the Institutional Self Study

**Answer** Habit for Humanity, spirituality grant for campus ministry, cultural immersion scholarships, other examples from pages 19-27 also acceptable

Page # of Self Study where you found the answer: 19