Program Review Handbook

Program Review Handbook

A Course-based Approach to Conducting Program Review

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Introduction

A New Way to Think about Program Review

In the Winter of 2021, I learned that I would be taking over responsibility for coordinating my university's cyclical program review process. The university offers over 200 programs— from traditional academic programs to trades training, from certificates to graduate degrees, with three quarters of programming offered in person, synchronously and the remainder online, asynchronously. With such a large number of programs scheduled for review at least once every seven years, my first thought was "*How will I manage to coordinate so many reviews at once*?!"

After exploring several different project management tools, I finally went back to my roots as an elementary school teacher.

When I viewed program review through the lens of a teacher in a classroom, all of the strategies proven successful for student learning became available to me as a new way to think about coordinating meaningful program reviews.

What I also knew from being a teacher was that I could manage a class of 30 students. When I thought of the 30 programs as unique individuals, that realization inspired a cohort-based approach to program review using a personalized, yet cohesive structure of a "Program Review Course".

Program Review: The planned and systematic evaluation of a department/program to determine whether "acceptable standards of education, scholarship, and infrastructure" (DQAB, 2023) are in place to support student success and continuous quality improvement. Program review involves a combination of self- and external peer- evaluation, and is normally undertaken once every five to seven years. It is a requirement of publicly funded post-secondary institutions in Canada, and is regarded as a best practice for ensuring academic quality (McGowan, 2019).

A Course for Facilitating Multiple Program Reviews

This Program Review Handbook describes how one university implemented a Program Review Course for conducting multiple reviews and how they leveraged the concept of academic program review learning communities (Hoare et al., 2022) as catalysts for program improvement. The 14-month course described in this Handbook provides a structured opportunity for faculty to participate ina Program Review Learning Community (PRLC), a communitydesigned for researching, reflecting, evaluating, and inquiring about educational practices to improve student outcomes (DuFour & Eaker, 1998; Hord, 1997; Stoll et al., 2006).

Our hope is that by sharing the approach we developed others can support the creation of engaging quality assurance processes that are collaborative, collegial, and (dare we say…) *fun*!

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Overview

The Program Review Handbook describes a step-by-step process for implementing a Program Review Course that provides quality assurance practitioners with a method for conducting multiple program reviews at once. In addition, the Program Review Course creates an environment for a professional learning community of faculty to research, reflect, explore, and learn (Hoare et al., 2022). The primary audience for this Handbook is faculty, staff, and administrators responsible for facilitating and participating in program review.

Program Review Course: A cohort-based course that encompasses eight program review modules. Course content is available in a learning management system and delivered through a variety of methods including self-guided and direct instruction (e.g., interactive workshops, one-on-one meetings, short info-sessions, independent writing). The 14-month Course is co-facilitated by quality assurance practitioners and educational developers (Hoare et al., 2024).

The Program Review Course is designed to be housed in an office of quality assuranceand coordinated and maintained by a quality assurance practitioner. All aspects of the course are available throughthe university's learning management system (e.g., Moodle, Blackboard).

During the 14-month course, faculty engage in a comprehensive review of their program and/or department. This team-based course is designed to evaluate program performance in relation to student success, curriculum content, program viability and impact, and contribution to the university's mission and vision. Program performance is measured through a combination of self- and external peer- evaluation. Through evidence-based inquiry and analyses, findings are documented in a comprehensive report leading to an action plan and goals for program improvement over the next five to seven years. The focus of the program review course is continuous quality improvement—*Helping good programs get even better!*

Program Review Course Learning Outcomes

During the course and upon completion of the course, faculty members will:

- maintain a collegial, team-based approach that is faculty-led;
- consider diverse perspectives of students, alumni, community and industry members, staff, faculty, and administrators;
- follow an evidence-based approach to improvement;
- critically reflect upon educational practices to improve student outcomes;
- collaborate effectively with quality assurance practitioners and educational developers to improve teaching and learning;
- engage in open dialogue with external peer reviewers; and,
- develop an Action Plan for program improvement that is multi-year and formative.

Course Modules and Timeline

The course consists of eight modules with many of the modules occurring concurrently as shown in the table below. Here we offer a suggested time-frame; however, this can be adapted to meet local needs.

Table 1.1

Module	**Time-frame**
1. Orientation	May
2. Program Learning Outcomes and Curriculum Map	May – August
3. SOAR Analysis Activity	May – August
4. Surveys	May – October
5. Self-Study	May – December
6. External Review	August – March
7. Action Plan	March – May
8. Response to Recommendations	May – June

There is a great deal of flexibility built into the timing of the modules to allow for program review teams to choose a pace that best meets their needs. For example, we estimate that writing the Self-Study Report will take three to four months; however, we allow seven months for program review teams to complete Module 5 because we know faculty have many competing priorities, that collaborative efforts can be more time-consuming than individual, and there is value in providing opportunities and time for critical reflection and adequate space for dialogue.

Program Review Teams

The heart of the course is the notion of *community* and the belief that a learning culture is best achieved through "a communal rather than solitary happening" (Rosenholtz, 1989). However, research suggests that program reviews may not be meeting institutional needs due to processes that are authoritarian and non-collegial (Bowker, 2016; Turner et al., 2018). In a recent study of sociology faculty across North American higher education, Scheuer Senter et al. (2021), discovered that as many as one-third of program review self-study reports are written by a single individual.

To address this gap, the course includes processes for collaborative visioning and decision-making. Departments participating in the course establish a program review team that consists of three to five faculty members, including the program Chair. The central focus of this team-based approach is to build the leadership capacity, scholarly practice, and efficacy of the program review team members.

Research further suggests that successful professional learning communities extend beyond program faculty to include staff and administration thereby creating a university-wide community (Stoll et al., 2006). The Program Review Course is designed to bring togetheran interdisciplinary cohort of approximately six to eight departments who are supported by quality assurance practitioners and educational developers.

Interdisciplinary Program Review Cohort

The interdisciplinary cohort offers critical peer-to-peer learning and has the potential to illuminate interdisciplinary synergies. Approximately six to eight program review teams, representing distinct disciplines (e.g., history, biology, education, nursing) are enrolled in the course. Interdepartmental and cross-departmental connections are fostered through a distributed leadership model (Harris, 2014) that encourages faculty, staff, and administrators to collaborate on a shared goal.

This interdisciplinary cohort of program review teams engages all members as active participants in the program review orientation, information sessions, and workshops. The benefit of such an approach is the shared learning that results from collaboration and inquiry. For example, faculty members who have prior program review experience, regardless of their discipline, can share their knowledge with other members of the cohort. In addition, when a question is asked by one faculty member during a session, other members of the cohort can hear the response; and, when common opportunities or challenges arise, the cohort can collectively advocate for institutional support.

Quality Assurance Practitioners and Educational Developers

The primary role of quality assurance practitioners and educational developers in the Program Review Course is to facilitate, guide, and promote collaborative involvement, reflection, and inquiry. Kuh et al. (2015) argued that "facilitating cross-level dialogue and reflection on what the collective picture of student learning might mean for students will minimize fragmentation of assessment efforts" (p. 210). Through facilitated dialogues, faculty have structured opportunities to reflect on the meaning of assessment information at the program, department, college, and university level.

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How to Use the Handbook

The Program Review Handbook is based on our experience as teachers, researchers, and quality assurance practitioners in post-secondary education in British Columbia and Ontario, Canada. The modules and timelines are designed with the local context in mind. We encourage you to borrow and adapt our modules to develop a process that best fits your institution's needs.

The primary audience for the Program Review Handbook is quality assurance practitioners and educational developers. It is divided into eight chapters that correspond with the eight Program Review Course modules, as well as a ninth chapter describing steps for a mid-cycle progress report. In addition, a tenth chapter details methods for creating tighter linkages between program reviews and institutional planning.

Each module includes:

- A brief overview
- Step-by-step instructions that can be shared with program review teams
- Resources for quality assurance practitioners and educational developers to facilitate workshops and activities
- Templates
- Articles for further reading

We are interested in establishing a quality assurance network within BC and Canada. If you would like to learn more about our work, collaborate on a project, or join the growing quality assurance collaborative in BC, please reach out to us!

Share and Adapt!

We hope that you find these materials useful in your own practice! You are welcome to share and adapt the materials (CC BY-NC-SA 4.0); however, we ask that you include the following attribution:

> Hoare, A., Dishke Hondzel, C., & Wagner, S. (2022). *Program review handbook: A course-based approach to conducting program review.* TRU Pressbooks. https://programreviewhandbook.pressbooks.tru.ca/

PART I

MODULES

1. Orientation

Each spring, a new cohort of programs is enrolled in the Program Review Course.

In March, a quality assurance practitioner reaches out to deans and program chairs to remind them of the programs within their Faculty/School that are scheduled for external program review. They are also invited to join a cohort of programs as part of a 14-month Program Review Course.

Each department then forms a program review team of three to five faculty members who have primary responsibility over the review. Once teams are established, they are enrolled in the Program Review Course that is set-up in the university's learning management system where they have access to resources including templates, timelines, recommended submission dates, info sessions, and workshops.

In May, the cohort of program review teams attend a half-day Program Review Orientation where they engage in an interactive session facilitated by representatives from the offices of quality assurance and institutional research, and teaching and learning centre. The Orientation is designed to be hands-on, collaborative, and educative in order to set programs up for a successful review. In addition, participants have opportunities to ask questions and share their prior experiences. Alumni who have completed the course are also invited to share their experiences.

Instructions for Program Review Teams

Timeline: April – May

Recommended Submission Dates: April **and** May

In preparation for the Orientation, please take some time to complete the following activities:

- Email the quality assurance practitioner with a list of the following people in April:
    1. Program review team members
    2. Program review team lead
- Your team will the be registered in the Program Review Course in Moodle.
- You will be invited to attend the Orientation session in May.
- Accept the calendar invitation to attend the Orientation session or designate someone to attend in your absence.
- Read Module 1 in the Program Review Handbook.

Orientation Agenda

Table 2.1

Time	**Activity**
9:00 – 9:30am	Welcome and introductions; Why program review matters
9:30 – 9:45am	Overview of research-informed approach to program review and participant survey
9:45 – 10:15am	Overview of Program Review Course and Learning Modules
10:15 – 10:45 am	Guest speaker: Institutional Data – Student Enrolment and Achievement
10:45 – 11:15am	Guest speaker: Institutional Data – Student Pathways
11:15am – 12:00pm	Guest speaker: Reconciliation, Indigenization, and Decolonization
12:00 – 12:30pm	Lunch
12:30 – 1:30pm	Program Review Alumni Panel
1:30 – 2:50pm	Activity: Program Review Timeline (PDF)[1]
2:50 – 2:00pm	Closing remarks and next steps

Note: To learn more about our experiences delivering the Orientation, which evolves each iteration, please reach out to us (see Authors for our contact information).

Presenters

Quality Assurance Office

- Director
- Quality assurance practitioner

Teaching and Learning Centre

- Director
- Educational Developer

Institutional Research Office

- Director
- Institutional research staff

Faculty

- Program review alumni (i.e., faculty members and program chairs from previous program review cohorts)

Learning Outcomes

By the end of the Orientation, faculty will be able to:

- describe the key components of a high-quality self-study
- identify appropriate data collection methods to assist with their self-study
- engage colleagues in developing learning outcomes and mapping the curriculum of their programs
- identify the key personnel at the university who can provide support with elements of their self-study
- articulate the reporting schedule

[1] Modified from Hoare, A., Dishke Hondzel, C., Hoessler, C., & Petri. D. (2021, May 13). *2021 Program review orientation* [Workshop]. Thompson Rivers University, Kamloops, BC.

2. Program Learning Outcomes and Curriculum Mapping

Program Learning Outcomes

An important component of program review is the collegial review of and revision to program learning outcomes (PLO)—statements that describe the knowledge, skills, and attitudes of program graduates. Over time, PLOs may shift and the program may begin to look less like the program as it was initially designed. As faculty retire and others join, the culture of the program may need to be redefined to match the evolving expertise of the department. New trends and new skills also emerge over time in disciplines and professional fields, along with changes in programmatic accreditation requirements. A careful review of the existing PLOs and curriculum map can lead to program improvements and greater curricular coherency.

Curriculum Mapping

Curriculum mapping offers a visual approach to understanding the program curriculum, including how courses contribute to students' learning. The curriculum map provides clarity of program and course expectations and clarifies the connections between courses, PLOs, and institutional learning outcomes. In addition, curriculum mapping facilitates assignment and assessment design.

Instructions for Program Review Teams

Timeline: May 15 – August 31

Recommended Submission Date: August 31

1. Read Module 2 in the Program Review Handbook.
2. Contact the Teaching and Learning Centre if you need assistance with developing/refining PLOs and curriculum maps.
3. Save the program curriculum map in a secure place and prepare it for inclusion in the Self-Study Appendices.

Blank Curriculum Mapping Template (xlsx)

Activities

The Teaching and Learning Centre is a key partner during Module 2. Ideally, all program faculty members will participate in developing and/or revising PLOs and program curriculum maps. The whole process can be accomplished in roughly six hours over three to four meetings; however, it should be spread over time to allow for reflection, work to be done, and thoughtful responses to be considered.

Development or Refinement of Program Learning Outcomes

There are many ways to develop PLOs and create curriculum maps. We propose one method with a great deal of flexibility in mind.

Table 3.1

Topic	**Time**	**Description**
PLO Introduction	10 – 30 minutes	Teaching and Learning Centre provides an "Introduction to PLOs" presentation at the beginning of a departmental meeting. This is at the discretion of the department. The introduction can also occur over email.
PLO Brainstorming	5-10 minutes (Option: Survey) **OR** 1-2 hours (Option: Collaborative session)	To gather initial thoughts about PLOs, we suggest two options: 1) initiate a survey (see templates); or, 2) facilitate a collaborative brainstorming process using a tool (e.g., Padlet) or in synchronous session. The purpose is to gather input from all department faculty members, and others may be included the discretion of the program team (e.g., students, staff, etc.). The conversation should be driven by program faculty members. When a survey is distributed, Teaching and Learning Centre collects the survey results (typically a one to two-week turnaround) and prepares materials for a PLO workshop with the department.
PLO Sorting, clustering, theming	2-3 hours	Working individually, in small groups, and with the large group, department members sort, revise, and consolidate the PLOs into a draft list of approximately 5 to 12 PLOs. Themes and categories may emerge organically from the above process, or departments may already have a pre-defined framework that can serve as categories (e.g., professional and/or accreditation standards). If the program wants, the Teaching and Learning Coordinator can draft preliminary themes based on their reading of the survey data. For online sessions, collaborative tools or whiteboards can be used. For in person, flip chart paper, post-it notes, dot stickers, and markers can be used for this purpose. For hybrid sessions, we recommend using a buddy system (either a faculty member of Teaching and Learning coordinator) with online participants contributing verbally or through the chat feature.
PLO Editing	1-3 hours	Faculty revise PLOs, as needed. Keep in mind that the goal is 1 to 2 outcomes per overarching category/theme; and final PLOs should follow this structure: action verb + content area + qualifying phrase. For example: "By the end of this program, students will be able to address two of the TRC Calls to Action through their disciplinary lens."
Nest Steps		PLOs form the basis of the curriculum mapping activity.

Curriculum Mapping

Topic	Time	Description
Mapping courses to PLOs	2-3 hours per program	Once the department has reached consensus on the PLOs, they engage in curriculum mapping. Teaching and Learning Centre provides an "Introduction to Curriculum Mapping" presentation at the beginning of a departmental meeting. Program will decide which courses will be involved in the mapping (i.e., core, electives, legacy courses, etc.). Course descriptions and course learning outcomes for all courses to be included in the curriculum map are distributed to faculty members for review at least one week in advance of the workshop. Each faculty member will evaluate their courses based on the following questions: 1) Which PLOs are addressed in the course? 2) Does the course *Introduce*, *Reinforce*, or assess for *Competency* in relation to the PLO? 3) Which assessment techniques are used to evaluate achievement of the PLO? As many faculty teaching in the program as possible are required to participate in the workshop. Ideally all faculty will participate. This session is also an opportunity for programs to consider which courses map to the ILOs and/or accreditation standards/competencies/ outcomes.
Interpreting the map	30 minutes – 2 hours	This session is an opportunity for faculty to examine the strengths and opportunities of the program structure. The map provides a visual representation of the PLOs, allowing faculty to notice gaps or redundancies across the program. This session could be part of the above session or a standalone, or it could occur asynchronously.
Governance	1-3 hours	The PLOs and curriculum map should go to the department and then Faculty Council for approval. Before being implemented, they require Senate approval. If seeking an ILO designation for a course as a result of curriculum mapping, follow the ILO Procedures Guide, which details how to apply the foci tools.

Resources

The Centre for Excellence in Learning and Teaching (CELT) has numerous resources, including a guide to writing and assessing learning outcomes. CELT's learning outcomes resources are available online.

We also suggest taking a look at CRICKET (Course Renewal in a Kit), designed by faculty and staff at Thompson Rivers University – a "collaborative curriculum renewal space" with information about learning outcomes, learning activities, and assessment.

3. SOAR Analysis

SOAR stands for *Strengths*, *Opportunities*, *Aspirations* and *Results*. It is a strategic approach that focuses on strengths and seeks to understand an organization and its environment by including the voices of relevant stakeholders. This may include faculty, staff, students, and/or community partners (Cole & Stavros, 2019).

The purpose of the SOAR Analysis Activity during program review is to provide a way for faculty to engage in thinking about, and identifying the strengths and opportunities for program improvement using a structure that is adaptable, responsive, and delivers measurable results (Hoare et al., 2024).

Table 4.1

SOAR	**Description**
Strengths	What the program does well, along with its key assets, resources, capabilities, and accomplishments.
Opportunities	Environmental and external forces that impact the program and possibilities for growth.
Aspirations	An expression of what matters to the program. This presents an opportunity to discuss the vision for the future. This segment builds on current strengths and captures the stakeholders sense of momentum (and what they desire) for the future.
Results	Specific, measurable and tangible outcomes which will demonstrate that they have achieved the program's goals and aspirations.

For anyone who wants to read more about SOAR and how it relates to the more common SWOT analysis, we think the article "SOARing Towards Positive Transformation and Change" (Stavros & Cole, 2013) is helpful.

Instructions for Program Review Teams

Timeline: May 15 – October 31

Recommended Submission Date: October 31

1. Read Module 3 in the Program Review Handbook.
2. Contact the teaching and learning centre to schedule a pre-meeting and schedule the SOAR Analysis activity.
3. Plan for roughly three to four hours of collaborative engagement. Ideally, all program faculty will participate in the SOAR Analysis activity. This can be done in person or online according to the preference of the program.
4. The facilitator of the SOAR will write and provide the draft SOAR Summary Report to the program review team lead. Connect with the author if there are any discrepancies or errors of fact in the report.
5. Save the SOAR Summary Report in a secure place and prepare it for inclusion in the Self-Study Appendices.

SOAR Pre-Meeting

The facilitator of the SOAR Analysis Activity will meet with the program review team prior to engaging in the SOAR. During this meeting, dates and times will be confirmed along with the list of participants, departmental goals and vision.

At this time the facilitator will also seek to gain an understanding of program dynamics and personalities, so it is helpful if departmental successes and conflicts, as well as the the departmental history, are discussed openly. Though this pre-meeting is short, the information conveyed can go a long way to preparing faculty to contribute effectively and will help the facilitator to anticipate any bumps in the road before they appear.

SOAR Analysis Activity Agenda

The SOAR conversations center on what the department is already doing well, what programs or services could be enhanced, and what the next steps will be in making suggestions for the program review. Using a systems approach and including everyone, we take into consideration many relationships and interactions among people, programs, functions, and the broader environment.

Table 4.2

Time	**Activity**
10 minutes	Welcome, territorial acknowledgement and opening remarks
10 minutes	Overview of planning cycle and goals of the activity
30 minutes	Strengths: What can we build on?
30 minutes	Opportunities: What are our bests future opportunities?
10 minutes	Break
30 minutes	Aspirations: What do we care deeply about?
30 minutes	Results: How will we know if we are successful?
20 – 30 minutes	Wrap-up, finalize themes, and debrief

Note: In 2021, we offered in person, virtual, and hybrid options for the SOAR Analysis Activity. When working in a hybrid or virtual environment, we strongly suggest the use of co-facilitators, as well as collaborative documents (e.g., Google doc, Jamboard, shared document in Teams).

Resources for Quality Assurance Practitioners and Educational Developers

During the SOAR Analysis Activity, program review teams, additional faculty members, deans, and sometimes students respond to a series of questions related to strengths, opportunities, aspirations, and results of the program.

We have found success using Think-Pair-Share (Lyman, 1981) and one-two-four-all (Lipmanowicz & McCandless, 2014) to collaboratively generate ideas and to ensure the voices of quieter participants are heard.

When working in person we ask participants to capture their ideas on sticky notes, which we then sort into themes as a group. In virtual settings, depending on the size of the group and their familiarity with technology, shared documents and breakout rooms have proven very successful (e.g., Jamboard, Padlet, Google doc). A co-facilitator can aid this process immensely, especially with large departments.

- SOAR Agenda and Questions (PDF)
- SOAR Overview Presentation (PDF)

After the SOAR Analysis Activity, the facilitator prepares a report summarizing the conversations.

- SOAR Report Template (PDF)

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4. Surveys

One of the expectations of program review is that stakeholder groups will be consulted, including: students and faculty, and alumni and employers (as appropriate). For each stakeholder group, there are survey templates that act as a starting point. Program review teams may add questions to the surveys to capture the specific needs of their program(s).

A support person builds and distributes program review surveys in consultation with the program review teams. In the past, we have used *SurveyMonkey*; however, there are a variety of user-friendly platforms that can be used to create online surveys.

Instructions for Program Review Teams

Timeline: May 15 – October 15

Recommended Submission Date: October 15

1. Read Module 4 in the Program Review Handbook.
2. Attend the mini workshop in May where we will discuss survey administration, collection, and analysis.
    - Survey Workshop Agenda (PDF)
3. Review the survey templates, and consider if any new questions should be added.
    - Student Survey (PDF)
    - Student Survey_Demographic Questions (PDF)
    - Faculty Survey (PDF)
    - Alumni Survey (PDF)
    - Employer Survey (PDF)
4. Contact a quality assurance practitioner to build surveys.
5. Determine distribution strategy and prepare contact lists in consultation with a quality assurance practitioner.
6. Review and analyze survey responses using the summary reports provided by the support person.
7. Save the summary survey reports in a secure place and prepare them for inclusion in the Self-Study Appendices.

Note: Depending on the department, surveying additional stakeholders (e.g., community, industry, Indigenous community members, internal departments) or utilizing different data collection methods (e.g., focus groups, interviews, cultural/journey mapping) may be valuable. Staff and faculty in the office of quality assurance and teaching and learning centre can support departments in developing customized data collection tools.

Survey Distribution

There are several strategies and combinations of strategies available for administering the surveys. The best strategy for each program is determined by the program review team in consultation with the office of quality assurance, for example:

- A support person can distribute surveys via email using a secure web link. The survey is accompanied by an explanatory covering email describing the purpose and due date for survey completion.
- The Chair can distribute the surveys in a similar fashion via email.
- The Chair and/or a quality assurance practitioner can attend classes (either in person or virtually) to administer the survey, as well as to describe the purpose and value of program review to students.
- Survey links can be shared in Student or Alumni Newsletters.
- *Any combination of the above!*

The survey remains open for four weeks. In consultation with the program review team, reminders and/or extensions may be used to encourage participation.

Approximately three weeks following the closing of the survey, the support person will share the survey results with the program review team in a Summary Report. The results are anonymized and redacted (as appropriate) to ensure that the confidentiality of survey participants is maintained, and that no person is identified in the survey responses. The survey reports are shared with the External Reviewers (Module 6) and results from the surveys inform the development of an Action Plan (Module 7).

We believe it is important for faculty to have primary responsibility over analyzing and interpreting the survey results to maintain the credibility of the findings (Hoare et al., 2024) because those involved in and engaged in the day-to-day operations of the program are best positioned "to ensure the richness, subtlety, and nuance of meaning are not lost in translation" (Wehipeihana, 2019, p. 372).

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5. Self-Study

The completion of the Self-Study Report is the heart of the review.

Program review is an evidence-based inquiry, and the Self-Study Report is a tool for stimulating conversations and questioning assumptions about program performance. Topics addressed in the Self-Study Report often include program context, curriculum and assurance of learning, student achievement, governance and resources, planning, and sustainability.

We encourage program review teams to produce a frank, balanced, comprehensive self-evaluation. It is a comprehensive analysis *about the program, by the program*. The Self-Study Report should reflect the involvement and consultation of faculty, staff, and students.

Instructions for Program Review Teams

Timeline: May 15 – December 1

Due Date: December 1

1. Read Module 5 in the Program Review Handbook
2. Complete the program self-study report using the template provided.
    - Self-Study Report Template (PDF)
    - Self-Study Appendices (PDF)
3. Submit the completed self-study report and appendices to your Dean for approval.
4. Submit the completed self-study report to the office of quality assurance at least six weeks in advance of your scheduled external review site visit. Note that the self-study report and appendices will be shared with the external reviewers at least four weeks prior to the site visit.

Note: At the start of each cohort in the spring, the office of quality assurance submits a bulk data request to the office of institutional research for program-specific student enrollment and achievement data, as well as a department-level summary course evaluation report. This ensures that institutional research has sufficient time to gather the data and provide customized reports for each program. The data will be provided to program review teams no later than December 1 for inclusion in the Self-Study Report.

Writing the Self-Study

When writing the Self-Study Report be mindful to explain things as they are and indicate if the program has plans for the future. The purpose of the program review is to identify opportunities for improvement; therefore, the Self-Study Report is not an effort in public relations, but rather a way to develop pathways to program improvement.

Plan for three to four months to complete the report. In general, responses to each question should be a couple of paragraphs in length.

Honesty and clarity are hallmarks of a good self-study. If the program does not mention shortcomings, or glosses over problems, then these problems cannot be dealt with in the Action Plan (Module 7). Resist completing questions just to complete the question. For instance, the program should not quickly develop a mission statement just to add it to the Self-Study Report. Instead, it is suggested that a simple and truthful, “The program does not have a mission statement” is a better answer. By being truthful it allows the program, and the external reviewers, to discuss the issue in a productive manner.

A quality assurance practitioner reviews a draft of the Self-Study Report and offers suggestions for clarification at least six weeks prior to the external review site visit. The Self-Study Report is then shared with the External Reviewers four weeks in advance of the site visit.

Optional “By Request” Self-Study Workshop

The office of quality assurance offers a three-hour Self-Study Workshop by request that can be customized for each program review team. The Workshop provides protected time and space for program faculty to reflect upon the self-study report questions and generate responses. An overview of the Workshop and agenda are available in the following PDF: By Request Self-Study Workshop (PDF)

6. External Review

The insights and guidance of external reviewers play a fundamental role in action planning for program review. In British Columbia, Ministry guidelines require that programs undergo external review by appropriate experts, including "an assessment conducted by a panel consisting of experts external to the institution that normally includes a site visit; a report of the expert panel assessing program quality and recommending any changes needed to strengthen that quality; and, a formal institutional response to the recommendations in the report" (DQAB, 2006, p. 5).

External review involves consultation with external experts who provide their opinion about program strengths and opportunities for improvement. This adds validity and value to the review process. The role of the external reviewers (as individual experts and collectively as a team) is to comment and advise the program on the strengths and challenges facing the program in terms of the market demand, curriculum, pedagogy, structure, service to students, and resource use.

Nominating External Reviewers

Instructions for Program Review Teams – Nominating External Reviewers

Timeline: August 1 – September 30

Recommended Submission Date: September 30

1. Read Module 6 in the Program Review Handbook
2. Attend the virtual info-session in August where we will discuss the external review process.
3. Complete the External Reviewer Nomination Form using the template provided.
    - External Reviewer Nomination Form (PDF)
4. Seek Dean approval of the External Reviewer Nomination Form.
5. Submit the External Reviewer Nomination Form to the office of quality assurance. Note that the Provost (or designate) gives final approval of the external reviewer nominees.

Criteria

The program review team nominates potential external reviewers based on the following criteria:

Table 5.1

Criteria	**Description**
Disciplinary Expertise	External Reviewers will be respected peers with proficiency in the areas of specialization that are important to the program being reviewed.
Administrative Experience	Administrative experience is an asset, as is prior experience in conducting academic program reviews. The Reviewers should be experienced academics who understand university operations and education, who are able to realistically evaluate the program's operations, the plans for growth and development, the professional activities of faculty members, and who can assess the program's strengths and opportunities relative to similar programs at other comparable institutions.
Curriculum Development	The Reviewers should also have experience in pedagogical and curricular development in the field. In the case of a graduate program review, the reviewer must have considerable experience in graduate education.
Diversity	The university is committed to fostering diversity and re-examining our practices in new ways. In addition to ensuring the external reviewers meet the criteria noted above, the program area should strive to identify External Reviewers who demonstrate a balance of diversity based on gender identity, sexual orientation, racial/ethnic identity, Indigenous ancestry, and persons with disabilities.
Conflict of Interest	Any perceived or actual conflict of interest must be avoided. It is preferable to avoid former mentors or close personal friends of current university faculty members, former employees, or individuals who have applied for, or are likely to apply for, a position at the university. "Arm's length" reviewers have no family ties, partnership links, supervisory relationships or other relationships with anyone in the program being reviewed. A conflict of interest would exist in cases where the proposed consultant has collaborated or published with a member of the program within the past 7 years, has an administrative or family link with a member of the program being reviewed, has been a supervisor or supervisee (graduate or postdoctoral) of a member of the program being reviewed within the past 7 years, is a former member of the program being reviewed, is a friend of a member of the program being reviewed, or has been a recent (within the past 5 years) visiting professor in the program being reviewed.

Number of External Reviewers

For non-degree programs, a minimum of two external reviewers are required for the review. For degree programs, a minimum of three external reviewers are required for the review. Depending on the nature of the program review and its issues, deans may request more than the minimum number of reviewers. Usually, external reviewers are appropriately experienced academics from other institutions. For programs that have a solid experiential focus, one of the reviewers may be an industry expert to provide advice and insight into the practical application of the program.

Once there is a list of approved candidates, a support person in the office of quality assurance will contact the potential reviewers equal to the number of required reviewers for the credential-level. The nominated reviewers are invited, via e-mail, to assist the university in the program review. Once the required number of external reviewers are confirmed, they receive the following materials:

- External Reviewer Report Template (PDF)
- External Reviewer Welcome Package (PDF)
- Self-study report and appendices (minimum of four weeks in advance of the site visit)

Hosting the External Review Site Visit

Instructions for Program Review Teams – External Review Site Visit

Timeline: September 1 – February 28

Recommended Submission Date: February 28

1. Coordinate the external reviewer site visit in collaboration with the office of quality assurance.
2. Ideally, site visits are scheduled a minimum of 3 months in advance to ensure availability of all parties.
3. Where appropriate, there is the option to do virtual site visits.
4. The Faculty/School is responsible for the costs associated with the External Review site visit, including all travel costs of the reviewers and catering. In addition, the program review team is responsible for room bookings, recruiting faculty, staff, and students to attend meetings with external reviewers, and facilitating the site visit events.

Resources:

- External Review Site Visit Agenda (PDF)
- Instructions for Coordinating a Successful Site Visit (PDF)
- Instructions for Coordinating a Successful VIRTUAL Site Visit (PDF)

The most unpredictable part of the process is setting up the site visit, which entails identifying site visit dates that work for all of the program review participants, including senior leadership, deans, chairs, faculty members, current students, program graduates, and the external reviewers themselves. Therefore, site visits are coordinated a minimum of three months in advance by the office of quality assurance in consultation with the program review team.

The site visit typically spans two days. While on-site, the external reviewers will meet with students, graduates, faculty, administration, and other key stakeholders, as appropriate. A site visit schedule is developed well ahead of the visit to ensure that the maximum benefit is derived from the visit. While on-site, time will be scheduled for the external reviewers to discuss their findings, prepare for their exit interview with the Dean, and start writing their External Reviewer Report.

External Reviewer Report

The external reviewers provide a report detailing recommendations and commendations for program improvement. On the second day of the site visit, the external reviewers are given time to work together on the External Reviewer Report.

The report is submitted to the office of quality assurance roughly three weeks following the site visit. The External Reviewer Report is shared with the Provost (or designate), Dean, and program review team who have an opportunity to review the Report for omissions or factual errors. The External Reviewer Report contributes to the development of the Action Plan (Module 7).

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7. Action Plan

The primary goal of program review is to support program improvement. Action planning is essential in translating a long list of good ideas into a manageable list of specific goals that a program can achieve during the coming years to move the program forward. The Action Plan should be a direct, documented outgrowth of the program review process.

The Action Plan shows *what* and *how* the program will respond to the program review findings. Note, there is a tendency to take on most of the Action Plan items immediately, and consequently overloading the program. The recommended approach is to stage a selection of manageable projects over the subsequent years, thereby involving the program in constant program improvement in a measured, sustainable way.

Instructions for Program Review Teams

Timeline: March 1 – May 15

Recommended Submission Date: May 15

1. Read Module 7 in the Program Review Handbook.
2. Attend the Action Planning Workshop in March.
3. Complete the Action Plan template by considering all of the data collected during the program review course:
    - Action Plan Template (PDF)
4. Seek Dean approval of the Action Plan.
5. Submit the completed Action Plan to the Associate Director.

Action Planning Workshop Agenda

The Action Planning Workshop is 90 minutes in duration and intended to create a space for faculty, chairs, and deans to discuss the program review findings and draft goals for program improvement.

Table 6.1

Time	Activity
8:45 – 9:00	Refreshments (e.g., coffee, tea, pastries, muffins, fruit salad)
9:00 – 9:15	Welcome, introductions, and purpose of action planning
9:15 – 9:50	Guided working session to identify broad themes evident in the data
9:50 – 10:10	Guided working session to categorize themes based on (1) internal goals that the program can control, and (2) external goals that are more difficult to modify.
10:10 – 10:30	Large group discussion to explore Frameworks for Implementing Goals Worksheet (PDF) (if time permits)

The following materials are provided to faculty, chairs, and deans at least one week prior to the Workshop:

- Binders containing copies of all program review data for each program (e.g., self-study, external reviewer report, surveys, SOAR report)
- Action Plan Template (PDF)
- Frameworks for Implementing Goals Worksheet (PDF)

Workshop Facilitators

Office of Quality Assurance

- Director
- Quality assurance practitioner

Learning Outcomes

During the Workshop, participants will:

- identify broad themes evident in the data
- draft approximately six to ten goals based on the themes
- explore frameworks for implementing the goals

Optional Customized Action Planning Workshop

The office of quality assurance offers a three-hour customized Action Planning Workshop by request. The Workshop provides protected time and space for program faculty to reflect upon the data gathered during the program review and begin to draft the Action Plan. An overview of the Workshop and agenda are available in the following PDF:

- CUSTOMIZED Action Plan Workshop Agenda (PDF)
- Action Planning Methodology (PDF)
- Action Plan Template – LARGE (PDF)

Prior to the workshop, faculty complete a short survey to answer the following questions:

- Question 1a: Identify one goal for program improvement based on findings from the program review.
- Question 1b: Identify the source of evidence that supports the need for this goal (e.g., student survey results, external reviewer recommendation).

- Question 2a: Identify one goal for program improvement based on findings from the program review.
- Question 2b: Identify the source of evidence that supports the need for this goal (e.g., student survey results, external reviewer recommendation).
- Question 3a: Identify one goal for program improvement based on findings from the program review.
- Question 3b: Identify the source of evidence that supports the need for this goal (e.g., student survey results, external reviewer recommendation).

The responses to 1a, 2a, and 3a are then transferred to large sticky notes and used as the jumping off point for the workshop activities, including sorting and theming.

8. Response to Recommendations

The British Columbia Ministry of Post-secondary Education and Future Skills requires that all degree programs be reviewed at least once every five to seven years and that they submit a response to external reviewer recommendations resulting from the review. These reports are commonly submitted to a standing committee of Senate responsible for academic planning. To align reporting with Ministry requirements, we recommend combining the Final Report with the Response to Recommendations.

The Report provides a brief summary of the cyclical review and response to external reviewer recommendations. The External Reviewer Report and Action Plan are appended to the Report. The Report is available on a publicly accessible location on the university's internal website.

Implementation of the program's Action Plan and goals are monitored internally by the program and the Dean and Chair are required to provide a Mid-Cycle Update to a standing committee of Senate in year five of the seven year reporting cycle, which is detailed further under the section titled "Progress Report".

Instructions for Program Review Teams

Timeline: May 15 – May 30

Recommended Submission Date: May 30

1. Read Module 8 in the Program Review Handbook
2. Complete the program review Final Report using the template provided.
    - Response to Recommendations and Final Report (PDF)
3. Append the External Reviewer Report and Action Plan to the Final Report.
4. Seek Dean approval of the Final Report.
5. Submit the completed report to the office of quality assurance.
6. Attend an academic planning and priorities committee meeting to present the Final Report and answer any questions that may arise.

Below is a step-by-step breakdown of the development, approval, and presentation of the Final Report:

Table 7.1

Responsibility	Task
Dean Approval	Dean receives the report and conducts a review, often conferring with the program review team. The Dean is responsible for supporting and resourcing any changes to the program that come from the Action Plan. The Dean may ask for changes and clarifications to the Action Plan and Final Report. Once approved, the Dean returns the report to the program review team who submit the report to the Associate Director.
Office of quality assurance	A quality assurance practitioner reviews the report to ensure all of the components are met. Once the review is completed, it is forwarded to the Provost (or designate).
Provost (or designate) Approval	The Provost receives the report and considers how the findings of the program review fit within the university's academic and strategic priorities. The Provost may ask for changes and clarifications. If there are concerns or questions about the Report, the Provost communicates these concerns with the Dean and program representatives to seek clarification and changes in the Report. Once satisfied, the Provost returns the Report to the Associate Director.
Academic Planning Committee Review	A quality assurance practitioner submits the Final Report to the Senate academic planning committee. The Dean and relevant members of the program review team attend a committee meeting to present the report and answer any questions that may arise. In addition, the Associate Director attends to answer any questions about program review processes and procedures.
Senate Review	Once reviewed by the academic planning committee, the Final Report goes forward to Senate. The Provost presents the report to Senate for information purposes only.
Public Posting	A quality assurance practitioner uploads the Final Report to an internal university website.

PART II

PROGRESS REPORT

9. Mid-Cycle Update

A challenge we often face in post-secondary education is, once reporting is complete, faculty and administrators often resume their routine work without reflecting on results (Kim, 2018). To address this gap, we encourage postsecondary institutions to adopt a mid-cycle reporting process to the academic planning committee mid-way through the seven year program review cycle.

The update details how the program has addressed the program's goals for improvement. The Module 7 Action Plan also serves as the foundation for the Mid-Cycle Update four years following completion of the Program Review Course and asks faculty to reflect upon their progress over the preceding years, including noting whether goals are *in progress*, *completed*, *modified*, or *removed*; and asks programs to list steps taken to address issues or barriers that may have arisen since the time that the goals were originally drafted.

Instructions for Deans and Program Review Teams

Timeline: May 1 – October 1

Due Date: October 1

Deans are notified by the office of quality assurance on May 1 that they are scheduled to provide a Mid-Cycle Update to APPC in October. This allows for five months to complete the Mid-Cycle Update template, which is a modified version of the Module 7 Action Plan template.

- Mid-Cycle Update Template (PDF)

Below is a step-by-step breakdown of the development, approval, and presentation of the Mid-Cycle Update:

Table 8.1

Responsibility	**Action Item**
Program Review Team	Program review team write the report using the template provided, detail how the program has addressed the program's goals for improvement mid-way through the 7 year program review cycle.
Dean	Dean reviews the Mid-Cycle Update. Once approved, the Dean forwards the Update to the office of quality assurance by October 1.
Office of quality assurance	A quality assurance practitioner receives the Mid-Cycle Update and checks it for completion. Once the review is completed, it is forwarded to the Provost (or designate).
Provost (or designate)	Provost (or designate) receives the Mid-Cycle Update and considers the program's progress. If the Provost has concerns or questions about the Mid-Cycle Update, the Provost communicates these concerns with the Dean to seek clarification. Once approved, the Provost returns the Mid-Cycle Update to the office of quality assurance.
Office of quality assurance	A quality assurance practitioner submits the Mid-Cycle Update to the academic planning committee of Senate.
Dean	Dean attends an academic planning committee meeting to answer any questions that may arise.

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PART III
STRATEGIC PLANNING

10. Cohort Report

Upcycling External Program Review Data to Strengthen Institutional Planning

We believe that reporting findings from academic program reviews to the university community demonstrates the institution's public commitment to improving program outcomes through transparent and evidenced-based decision-making.

While program reviews have utility at the program and departmental level, we also see the potential for program reviews to have significant impact at the institutional level; however, sufficient evidence for institutional change "requires accumulation of reviews" (Conrad & Wilson, 1985, p. 77).

During out time managing program review we saw great value in the data being collected and, given the richness and breadth of data available, we noticed an opportunity to link program review data to educational planning at the institutional level by creating an aggregate report summarizing themes from the departments participating in the Program Review Course that reflects both an internal and external lens. By strengthening the linkage between program reviews and educational planning, we aim to address Sauve's (2024) call for both *meaningful* and *manageable* program review practices. Our approach to analyzing external program reviews to inform educational planning is detailed in a forthcoming publication in the *Educational Planning Journal* (Hoare et al., Spring 2024).

We also see value in conducting a qualitative and quantitative meta-analysis or meta-synthesis of the Cohort Reports once every five to seven years. At that point in time, institutions may be able to pull data from upwards of 40 program reviews, thus offering significant opportunities to illuminate patterns and trends across the institution.

Internal data used to inform institutional planning

- A thematic analysis of the cohort's SOAR results aims to illuminate common strengths, opportunities, and barriers for academic planning and program improvement.
- Common core questions from student and faculty surveys provide information about the learning environment, adequacy and accessibility of student support services, student achievement of program learning outcomes, and program strengths and opportunities, just to name a few.

External data used to inform institutional planning

- A thematic analysis of the cohort's external reviewer recommendations and commendations offers a

comparative review and perspective from disciplinary experts external to the university.
- Common core questions from alumni and employer surveys provide information about program relevancy to societal, economic, and industry needs; students' academic preparedness for further studies; and program strengths and opportunities, just to name a few.

We believe that the Cohort Report provides a comprehensive assessment and recommendations for academic planning that spans disciplinary boundaries and may offer a solution to Coombs' (2017) call for direct linkages between program reviews and institutional strategic planning. A benefit of sharing aggregate findings is the potential to identify needs for faculty learning and development programming offered through the Centre for Excellence in Learning and Teaching; similarly, findings may inform improvements to academic advising, student support services; and illuminate systemic barriers to student success.

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Conclusion

We encourage you to take this handbook and use it on your campus to provide structure and resources for program review teams. If you decide to use any of the resources in this book, either adopting it or adapting it to fit your particular campus culture, we would appreciate receiving your feedback.

This handbook has been used as part of a Program Review Learning Community where the resources were embedded within a learning management system (Moodle) so that faculty could track their progress and download and upload documents on demand, while receiving direct messages and communication from a quality assurance practitioner. Though this approach is briefly documented here, it has been a fundamental shift in our approach, and allowed us to create a cohesive cohort of program review teams and network of peer support for faculty. This is currently an area of the literature that is not well-researched.

In ending, it bears repeating that we firmly believe that program review, when done well, can be a transformative and growth-oriented process that strengthens departments and leads to better outcomes for students. In the words of Maya Angelou, "*I did then what I knew how to do. Now that I know better, I do better*."

Thank you for taking the time to look at this Program Review Handbook.

Alana, Catharine & Shannon

Templates

The Program Review Course includes resources, activities, and templates for facilitating completion of the eight program review modules. We have listed them below for quick reference.

Table 9.1

Course Component	Resource
Moodle Course	• Moodle Backup File – Program Review 2023
Module 1: Orientation	• Activities: Team Values and Program Review Timeline (PDF)
Module 2: Curriculum Mapping	• Blank Curriculum Mapping Template (xlxs)
Module 3: SOAR Analysis Activity	• SOAR Agenda and Questions (PDF) • SOAR Overview Presentation (PDF) • SOAR Report Template (PDF)
Module 4: Surveys	• Survey Workshop Agenda (PDF) • Student Survey (PDF) • Student Survey_Demographic Questions (PDF) • Faculty Survey (PDF) • Alumni Survey (PDF) • Employer Survey (PDF)
Module 5: Self-Study	• Self-Study Report Template (PDF) • Program Review Self Study Report_List of Appendices (PDF) • By Request Self-Study Workshop (PDF)
Module 6: External Review	• External Reviewer Nomination Form (PDF) • External Reviewer Report Template (PDF) • External Reviewer Welcome Package (PDF) • External Review Site Visit Agenda (PDF) • Instructions for Coordinating a Successful Site Visit (PDF) • Instructions for Coordinating a Successful VIRTUAL Site Visit (PDF)
Module 7: Action Planning	• Action Plan Template (PDF) • Action Plan Template – LARGE (PDF) • Customized Action Plan Workshop Agenda (PDF) • Action Planning Methodology (PDF) • Framework for Implementing Goals Worksheet (PDF)
Module 8: Reporting	• Response to Recommendations and Final Report (PDF)
Mid-Cycle Program Report	• Mid-Cycle Update Template (PDF)

Share and Adapt!

We hope that you find these materials useful in your own practice! You are welcome to share and adapt the materials (CC BY-NC-SA 4.0); however, we ask that you include the following attribution:

> Hoare, A., Dishke Hondzel, C., & Wagner, S. (2022). *Program review handbook: A course-based approach to conducting program review.* TRU Pressbooks. https://programreviewhandbook.pressbooks.tru.ca/

Authors

We are always looking to connect with other quality assurance practitioners and educational developers. We are interested in establishing a quality assurance network within BC and Canada. If you would like to learn more about our work, collaborate on a project, or join the growing quality assurance collaborative in BC, please reach out to us!

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Dr. Shannon Wagner joined Thompson Rivers University as Associate Vice President Academic in 2021 and accepted the position of Vice President of Research in 2023. Prior to coming to TRU, Wagner served as Dean of the Faculty of Human and Health Sciences and Interim Dean of the College of Arts, Social and Health Sciences at the University of Northern British Columbia. Her research program includes topics related to occupational and organizational mental health, emergency services, and human rights in the workplace. Her teaching has focused on occupational health, psychological assessment, statistics, epidemiology and health promotion.

Shannon Wagner, PhD

Acknowledgements

Our sincere thanks to the following people for offering their feedback on this handbook.

Dr. Anne Sommerfeld, (former interim) Director, Centre for Teaching and Learning, University of Northern British Columbia

Dr. Aurelea Mahood, Director, Academic Initiatives and Planning, Capilano University

Dr. Kenneth Ristau, Quality Assurance Coordinator/Manager, MacEwan University

Dr. Michael Henry, Dean, Bob Gaglardi School of Business and Economics, Thompson Rivers University

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Versioning History

The table below reflects a record of changes made to the Program Review Handbook since its original publication on January 15, 2022.

Version	**Date**	**Description of Change**
3.1	24.03.10	Generalized process across post-secondary in Canada; anonymized institution
3.0	24.01.26	Updated references and author bios
2.9	23.08.09	Module 2: Updated instructions and timelines
2.8	23.05.26	Module 7: Added Action Planning Methodology
2.7	23.05.17	Module 4: Updated consent notice in all survey templates to align with guidance from the university's Privacy Officer
2.6	23.05.15	Updated colour theme throughout to align with colour research and accessibility concerns raised by readers (i.e., black text on yellow background)
2.5	23.05.06	Module 4: Added Survey Workshop Agenda; Templates: Uploaded Survey Workshop Agenda Template.
2.4	23.04.28	Templates: Updated Moodle Back-up File to 2023 Program Review Course.
2.3	23.04.09	Module 1: Revised Orientation agenda.
2.2	23.03.27	Module 8: Revised Response to Recommendations to align with Ministry guidelines; Templates: Uploaded a new Final Report Template.
2.1	23.01.05	Module 5: Added optional workshop for collaboratively writing the Self-Study; Module 7: Added customized workshop overview and agenda for action planning.
1.2	22.05.04	Module 1: Revised Orientation activity template
1.1	22.04.11	Module 1: Revised Orientation agenda