

Program Review Handbook

Program Review Handbook

A Course-based Approach to Conducting Program Review

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A New Way to Think about Program Review

In the Winter of 2021, I learned that I would be taking over responsibility for coordinating the 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 the courses offered on-campus and the remainder online. 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 program reviews at the same time?!"

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 that have proven successful for student learning became available to me as a new way to think about coordinating successful and 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 individual 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".



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Program Review: The planned and systematic evaluation of a department/program to determine whether "acceptable standards of education, scholarship, and infrastructure" are in place to support student success and continuous quality improvement (DQAB, under review). Program review involves a combination of selfand 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 will detail how one university implemented a Program Review Course for conducting multiple reviews and how they leveraged the concept of professional learning communities 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, a community designed 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 this approach to program review 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., in review). The primary audience for this Handbook is faculty, staff, and administrators responsible for facilitating and participating in program review.

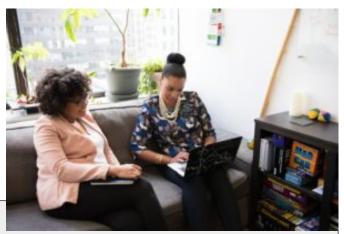


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Program Review Course: A cohort-based course that encompasses eight program review modules.

Course content is available in Moodle and delivered through a variety of methods (both asynchronous and synchronous), such as through interactive workshops, one-on-one meetings, short info-sessions, and selfdirected learning. The 14-month Course is facilitated by the Office of Quality Assurance and Centre for Excellence in Learning and Teaching (Hoare et al., under review).

At our institution, the Program Review Course is housed in the Office of Quality Assurance and coordinated and maintained by a quality assurance practitioner. All aspects of the course are available throughMoodle, the university'slearning management system.

Program Review Course Description

During the 14-month course, faculty will 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 will be 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.

Table 1.1

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

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



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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). Therefore, 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 (i.e., 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



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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) argue 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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Territorial Acknowledgement



Image of Thompson Rivers University, which is located on the traditional lands of the Tk'emlúps te Secwépemc within Secwépemc'ulucw, the traditional and unceded territory of the Secwépemc.

Thompson Rivers University campuses are on the traditional lands of the Tk'emlúps te Secwépemc (Kamloops campus) and the T'exelc (Williams Lake campus) within Secwépemc'ulucw, the traditional and unceded territory of the Secwépemc. Our region also extends into the territories of the St'át'imc, Nlaka'pamux, Nuxalk, Tŝilhqot'in, Dakelh, and Syilx peoples.

Listen to the Acknowledgement Here

As authors, we are deeply grateful to the Secwépemc peoples, on whose lands we have the opportunity to live, work and learn. As settlers and allies, we are committed to working in collaboration and partnership in order to respond to the Truth and Reconciliation Commission of Canada's Calls to Action. We believe that this work can contribute meaningfully to the quality of education so that all students, especially those from Indigenous communities, can see themselves and their knowledge valued in every learning environment.

In particular, using the process of cyclical program review, we aspire to provide leadership and opportunities for programs and departments to take meaningful action on the following Calls to Action:

62. We call upon the federal, provincial, and territorial governments, in consultation and collaboration with Survivors, Aboriginal peoples, and educators, to:

- 1. Make age-appropriate curriculum on residential schools, Treaties, and Aboriginal peoples' historical and contemporary contributions to Canada a mandatory education requirement for Kindergarten to Grade Twelve students.
- 2. Provide the necessary funding to post-secondary institutions to educate teachers on how to integrate Indigenous knowledge and teaching methods into classrooms.
- 3. Provide the necessary funding to Aboriginal schools to utilize Indigenous knowledge and teaching methods in classrooms.
- 4. Establish senior-level positions in government at the assistant deputy minister level or higher dedicated to Aboriginal content in education

and

- 63. We call upon the Council of Ministers of Education, Canada to maintain an annual commitment to Aboriginal education issues, including:
- 1. Developing and implementing Kindergarten to Grade Twelve curriculum and learning resources on Aboriginal peoples in Canadian history, and the history and legacy of residential schools.
- 2. Sharing information and best practices on teaching curriculum related to residential schools and Aboriginal history.
- 3. Building student capacity for intercultural understanding, empathy, and mutual respect.
- 4. Identifying teacher-training needs relating to the above.

To read more, please see the Truth and Reconciliation Commission's final report.

How to Use the Handbook

This Program Review Handbook is based on our experience at Thompson Rivers University-an open access, teaching and research university located in the interior of British Columbia. The modules and timelines described in this handbook 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



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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

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. 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, the Quality Assurance Officer 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, the Quality Assurance Officer registers them in the Program Review Course that is set-up in the university's learning management system (e.g., Moodle, Blackboard) 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 Office of Quality Assurance and Centre for Excellence in Learning and Teaching. 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 with program review. Alumni who have completed the course are also invited to share their experiences.



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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 Officer 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.
- · Please 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 - 9:20am	Welcome and introductions
9:20 - 9:35am	Overview of research-informed approach to program review and participant survey
9:35 - 9:45am	Purpose of program review, including internal and external regulatory requirements
9:45 - 10:00am	Overview of program review conceptual model and principles
10:00 - 10:30am	Team charter activity
10:30 - 10:45am	Refreshment break
10:45 - 11:00am	Overview of program review modules and logistics
11:00 – 11:10am	Overview of curriculum design and appreciative planning
11:10 - 12:00pm	Guest speaker: Indigenization
12:00 - 12:35pm	Lunch
12:35 - 1:00pm	Guest speakers: Program review alumni panel
1:00 - 1:30pm	Guest speakers: Integrated planning and effectiveness, including student enrollment and achievement data and surveys
1:30 - 1:50pm	Activity: Fillable Program Review Timeline (PDF)
1:50 - 2:00pm	Closing remarks and next steps

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

Presenters

Office of Quality Assurance:

- Associate Vice President Academic
- Quality Assurance and Accreditation Liaison Officer
- Curriculum Governance Officer

Centre for Excellence in Learning and Teaching:

- Director
- Coordinator, Learning and Faculty Development

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

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.



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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 (for

baccalaureate degree programs only). 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 Centre for Excellence in Learning and Teaching (CELT) if you need assistance.
- 3. Upload the program curriculum map using the assignment drop box in Moodle.

Activities

CELT 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.

Table 3.1

Topic	Time	Description
PLO Introduction	10 min.	CELT provides an "Introduction to PLOs" presentation at the beginning of a departmental meeting.
PLO Survey	25 min.	CELT initiates a PLO survey asking for input from all department members. CELT collects the survey results (typically a one to two-week turnaround) and prepares materials for first PLO workshop with the department.
PLO Sorting	1 hour	Working in small groups, department members sort, revise, and consolidate the PLOs into a draft list of eight to ten PLOs.
PLO Editing	1 hour	Faculty revise PLOs, as needed.
Governance and Approval	1 hour	The PLOs go to Department meeting and then Faculty Council for approval.
Curriculum Mapping Introduction	15 min.	CELT provides an "Introduction to Curriculum Mapping" presentation at the beginning of a departmental meeting.
How to Map Your Courses	1 hour	Once the department has reached consensus on the PLOs, they engage in curriculum mapping. Courses for the program will be distributed to faculty members for review. 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 develop Competency in relation to the PLO? (3) Which assessment techniques are used to evaluate achievement of the PLO?
How to Interpret the Curriculum Map	1 hour	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. The assessment patterns become apparent, opening discussions about best assessment practices, consistency between sections of the same course, and variety across the program.

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.

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 is to provide a way for faculty to collegially engage in thinking about, and identifying the strengths and opportunities for program improvement using a structure that is adaptable, responsive, and delivers measurable results.



Photo by Mark Olsen on Unsplash

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 CELT 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 face to face 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.
- 5. Make edits to the SOAR Summary Report and upload using the assignment drop box in Moodle.

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, and discuss whether or not the previous program review documents will be circulated.

At this time the facilitator will also seek to get 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, Photo by Mark Olsen on Unsplash 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 face-to-face, 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 (i.e., Google doc, shared document in Teams, etc.).

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 face-to-face we ask participants to capture their ideas on sticky notes, which we then sort into themes as a group. In online settings, depending on the size of the group and their familiarity with technology, shared documents and breakout rooms have proven very successful. 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).

The Curriculum Governance Officer, in the Office of Quality Assurance, builds and distributes program review surveys in consultation with the program review teams. *SurveyMonkey* is the survey platform used at our university; however, there are a variety of user-friendly platforms that can be used to create online surveys.



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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.
- 3. Review the survey templates, and consider if any new questions should be added.
 - Student Survey (PDF)
 - Faculty Survey (PDF)
 - Alumni Survey (PDF)
 - Employer Survey (PDF)
- 4. Contact the Curriculum Governance Officer to build surveys.
- 5. Determine distribution strategy and prepare contact lists in consultation with the Curriculum Governance Officer.
- 6. Review and analyze survey responses using the summary reports provided by the Curriculum Governance Officer.
- 7. Upload summary of survey results in the assignment drop boxes in Moodle.

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. The Office of Quality Assurance and Centre for Excellence in Learning and Teaching 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:

- The Curriculum Governance Officer 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 Quality Assurance Officer 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 Curriculum Governance Officer will share the survey results with the program review team in a Summary Report. The results are anonymized to ensure that the confidentiality of survey participants is maintained. 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 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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Wehipeihana, N. (2019). Increasing cultural competence in support of Indigenous-led evaluation: A necessary step toward Indigenous-led evaluation. *Canadian Journal of Program Evaluation*, 34(2), 368-384. https://doi.org/10.3138/cjpe.68444

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.





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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. Upload the completed self-study report using the assignment drop box in Moodle 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. This ensures that institutional research has sufficient time to gather the data and provide customized reports for each program.

Optional "By Request" Self-Study Workshop

The Office of Quality Assurance, in collaboration with the Centre for Excellence in Learning and Teaching, offers a three-hour Self-Study Workshop by request. 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)

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.



Photo by Yannick Pulver on Unsplash

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.

The Associate Vice President Academic and Quality Assurance Officer review a draft of the Self-Study Report and offer 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.

6. External Review

The insights and guidance of external reviewers play a fundamental role in action planning for program review. At our institution, university policy specifies that "the involvement of external, arm's-length consultants is also an essential part of the University's quality review and improvement process."

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.



Photo by Adam Winger on Unsplash

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. Upload the External Reviewer Nomination Form in the assignment drop box in Moodle. 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 TRU faculty members, former employees, or individuals who have applied for, or are likely to apply for, a position at TRU. "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, the Curriculum Governance Officer 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 Curriculum Governance Officer.
- 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 Curriculum Governance Officer 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



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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 will 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 Quality Assurance Officer 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).	ne

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

Photo by Jason Goodman on Unsplash

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 program Action Plan using the template provided 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. Upload the completed Action Plan in the assignment drop box in Moodle.

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 - 9:10	Welcome, introductions, and purpose of action planning
9:10 - 9:15	Overview of the Instructional Innovation Grant (IIG)*
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)

*The Centre for Excellence in Learning and Teaching offers an Instructional Innovation Grant (IIG). Proposals are invited from university Instructors, tenure-track, and tenured faculty who are interested in enhancing and building the classroom experience by adopting or experimenting with instructional approaches that challenge, support, and encourage students.

Workshop Facilitators

Office of Quality Assurance

- Associate Vice President Academic
- Quality Assurance Officer
- Curriculum Governance Officer

Centre for Excellence in Learning and Teaching

• Director

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

8. Report to University Community

In accordance with our university's policy, programs are required to report findings from cyclical reviews to the Academic Planning and Priorities Committee of Senate (APPC). The Report to APPC provides a summary of the cyclical review and identifies the strengths of the program, and details goals for improvement. A Cohort Report is also shared and is detailed further under the section titled "Institutional Planning"

The Program Report and Cohort Report are made available on a publicly accessible location on the university's internal website.

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



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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.
 - Final Report Template (PDF)
- 3. Append the Action Plan to the Final Report.
- 4. Seek Dean approval of the Final Report.
- 5. Upload the completed report to the assignment drop box in Moodle.
- 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 upload the report to the assignment drop box in the Program Review Moodle course.
Quality Assurance Officer Review	The Quality Assurance Officer receives the report via Moodle and reviews it to ensure all of the components are met. Once the review is completed, the Quality Assurance Officer forwards the Action Plan and Final Report 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 TRU'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 Quality Assurance Officer.
APPC Review	The Quality Assurance Officer submits the Final Report to APPC. The Dean and relevant members of the program review team attend APPC to present the report and answer any questions that may arise. In addition, the Quality Assurance Officer attends to answer any questions about program review processes and procedures.
Senate Review	Following the APPC meeting, the Final Report goes forward to Senate. The Provost presents the report to Senate for information purposes only.
Public Posting	The Quality Assurance Officer uploads the Final Report to an internal university website.

PART II PROGRESS REPORT

9. Mid-Cycle Update

A challenge we often face in higher education is, once reporting is complete, faculty and administrators often resume their routine work without reflecting on results (Kim, 2018). To address this gap, at our university, policy states that programs are required to provide a Mid-Cycle Update to the Academic Planning and Priorities Committee of Senate (APPC) 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



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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 Quality Assurance Officer 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 Quality Assurance Officer by October 1.
Quality Assurance Officer	Quality Assurance Officer receives the Mid-Cycle Update and checks it for completion. Once the review is completed, the Quality Assurance Officer forwards the Mid-Cycle Update 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 Quality Assurance Officer.
Quality Assurance Officer	Quality Assurance Officer submits the Mid-Cycle Update to APPC.
Dean	Dean attends APPC to answer any questions that may arise.

References

Kim, G. (2018). An exploratory case study of a quality assurance process at an Ontariouniversity. University of Western Ontario, Electronic Thesis and Dissertation Repository. 5857. https://ir.lib.uwo.ca/etd/5857

PART III INSTITUTIONAL PLANNING

10. Cohort Report

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 (Hoare et al., under review).

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)



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Therefore, to support institutional planning, the Office of

Quality Assurance develops a Cohort Report- an aggregate report summarizing themes that emerged from the departments participating in the Program Review Course- that reflects both an internal and external lens. The Cohort Report is presented to APPC and Senate to inform strategic academic planning every time a Program Review Course is delivered.

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

- · An 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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Hoare, A., Dishke Hondzel, C., Wagner, S., & Church, S. (under review). A program review course for facilitating academic program review.

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 is used at Thompson Rivers University as part of a Program Review Learning Community, and the resources are embedded within a learning management system (Moodle) so that faculty can track their progress and download and upload documents on demand, while receiving direct messages and communication from the Quality Assurance Officer. Though this approach is briefly documented here, it has been a



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fundamental shift in our approach, and has 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 2022
Module 1: Orientation	Fillable Program Review Timeline (PDF)
Module 2: Curriculum Mapping	• n/a
Module 3: SOAR Analysis Activity	 SOAR Agenda and Questions (PDF) SOAR Overview Presentation (PDF) SOAR Report Template (PDF)
Module 4: Surveys	Student Survey (PDF) Faculty Survey (PDF) Alumni Survey (PDF) Employer Survey (PDF)
Module 5: Self-Study	 Self-Study Report Template (PDF) Self-Study 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) Framework for Implementing Goals Worksheet (PDF)
Module 8: Reporting	Final Report Template (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:

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

Authors

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



Alana

Alana Hoare is Thompson Rivers University's Quality Assurance and Accreditation Liaison Officer in the Office of Quality Assurance. She holds an EdD from Western University, and a MEd, BEd, and post-baccalaureate certificate in Teaching English as an Additional Language (TRU). Alana's research projects have examined culturally responsive postsecondary performance measurement, the use of qualitative evaluation methodologies for student success, academics' and administrators' perceptions of accreditation, and EAL students' academic preparedness. As a quality assurance practitioner, Alana is responsible for leading and managing institutional accreditation with the Northwest Commission on Colleges and Universities, general education and strategic assessment of institutional learning, mission fulfilment planning and evaluation, and cyclical program review. Alana can be reached at ahoare@tru.ca



Catharine

Catharine Dishke Hondzel was appointed as the Director of the Centre for Excellence in Learning and Teaching at Thompson Rivers University in 2017. She holds a PhD in educational psychology (Western University) and an MA in applied social psychology (Windsor). Her work as an educational developer centres on appreciative faculty development, undergraduate research, experiential learning and the scholarship of teaching and learning. Her teaching experience has been in the discipline of social and educational psychology, including personality, health, adult education and research methods. Catharine's research projects have examined the role of teaching and the environment in fostering creativity; retention, completion and well-being in academic and trades students; and faculty and student perceptions of teaching cultures at research-intensive universities. Catharine can be reached at cdishke@tru.ca



Shannon

Shannon Wagner recently joined Thompson Rivers University (TRU) as Associate Vice President Academic, coming to TRU from the University of Northern British Columbia where she previously served as Dean Faculty of Human and Health Sciences, and Interim Dean College of Arts, Social and Health Sciences. Shannon holds a strong commitment to building excellence in academic teaching, research and service and has been involved in major initiatives such as institutional academic visioning and restructuring, and has led program planning, renewal and quality assurance

activities across a wide range of initiatives. Shannon's teaching has focused on occupational health, psychological assessment, statistics, epidemiology and health promotion and her research interests include quality assurance, organizational interventions, occupational mental health and diverse abilities in the workplace. She is also a registered clinical psychologist with a primary focus on psychological assessment for the workplace. Shannon can be reached at swagner@tru.ca

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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
1.1	22.04.11	Revised Orientation agenda