

SELF-STUDY HANDBOOK

CHAPTER THREE

*Guidelines for Institutions Receiving
Accreditation Evaluation Committees*

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Guidelines for Institutions Receiving Commission Accreditation Evaluation Committees

In addition to conducting the self-study and writing the report of this major effort, the school's other major task in the accreditation process involves the preparation and support necessary for the visit of an accreditation evaluation committee and attention to several details following the comprehensive evaluation. This chapter of the *Self-Study Handbook* describes the activities that the school should undertake prior to, during, and following the comprehensive evaluation. It also describes Commission procedures related to accreditation evaluations. The Guidelines Regarding Comprehensive Evaluation Logistics appended to this section of the *Handbook* provide more details on aspects of this section, including format and delivery of the self-study, transportation and accommodations of the evaluation committee, documents related to the self-study, and the time line of the action on the committee's recommendations by the Board of Commissioners ("Board").

Preparing for and Supporting the Work of the Accreditation Evaluation Committee

Several tasks should be completed before the comprehensive evaluation, many of them involving interactions among the school, accrediting staff, and the chair of the accreditation evaluation committee. These tasks include identification of evaluation dates, appointment of the committee, making local arrangements, preparation of a comprehensive evaluation schedule, distribution of self-study reports and related material, and preparation of additional materials to be available for the committee while on campus. In addition, the school needs to provide hospitality and support for the committee during the comprehensive evaluation.

Identification of Comprehensive Evaluation Dates

Approximately a year before the comprehensive evaluation, the accrediting staff will initiate a dialogue with the school's chief administrative officer or accreditation liaison officer about possible dates for the comprehensive evaluation. Comprehensive evaluations last from the afternoon of the first day to the morning of the fourth day, often Monday afternoon through Thursday morning. Additional time will be required to accommodate the on-site review of certain extension sites. Because accrediting staff should be present for some part of each comprehensive evaluation, dates will be negotiated that fit both school and accrediting staff calendars. In the case of joint or concurrent evaluations with regional agencies, the scheduling will be coordinated with the regional agency.

Appointment of the Committee

Approximately six to nine months before the evaluation, the accrediting staff will begin the work of appointing members of the accreditation evaluation committee. Committees for evaluations conducted by the Commission alone typically have three to five members. Joint Commission-regional committees are generally larger. While the selection of committee members is primarily a function of the Board through its staff, schools will be consulted frequently regarding the kinds of expertise most needed by committee members, the number of committee members, and identification of candidates for appointment. A school may object to the appointment of a committee member on the basis of a potential conflict of interest, which is defined in the Board's *Policy Manual*. The appointment of committee members is, finally, the prerogative of the Board.

Individuals are appointed to Commission evaluation committees on the basis of their expertise, general knowledge of theological education, and capacity to evaluate an institution in terms of its own mission and the accrediting standards. Evaluation committees will include a ministry practitioner and, for schools with comprehensive distance education programs, a member with expertise in the area of distance education. To the extent possible, committee appointments reflect the diversity of denominations, racial/ethnic character, national context, and gender present among Commission member schools. The final roster of evaluators is sent to the school approximately three months prior to the evaluation.

Making Local Arrangements

Institutions are responsible for making the local arrangements for the committee's visit as described in the Guidelines Regarding Comprehensive Evaluation Logistics.

In making arrangements for lodging, schools should be mindful that committee members have a great deal of work to accomplish in a very short period of time. The school's efforts to provide gracious hosting and comfortable housing will facilitate this work. Well in advance of the evaluation, the school should arrange for single room accommodations for committee members and staff at a comfortable, nearby hotel. Hotel rooms should have desks and adequate space for the committee

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

The school should arrange meeting spaces for the committee, both at the hotel and on campus. The hotel meeting room could be the sitting area of a suite, if it is of sufficient size to provide comfortable work space for the committee, or a separate meeting room in the hotel. Committees will typically use the hotel meeting space several hours on the opening day of the evaluation, and late afternoons and evenings each of the two full days of the evaluation. The school should also provide an office or room on the campus for the exclusive use of the committee. This room should be large enough to accommodate both full committee meetings and individual work space. It should also contain the documents, records, exhibits, and supporting material referenced in the self-study. (See a fuller description of these resources below.) The school should consult the Guidelines Regarding Comprehensive Evaluation Logistics and accrediting staff for details on the specific technological resources required.

The school will plan transportation in consultation with the chair of the committee and the accrediting staff member in accordance with the Guidelines Regarding Comprehensive Evaluation Logistics.

Preparation of Evaluation Schedule

Prior to the committee's arrival, the school and the chair of the committee with the assistance of the accrediting staff should together develop a schedule of activities. This schedule should be as complete as possible, even though changes may be needed during the evaluation. To expedite making these changes, the school should designate one individual to work with the committee to schedule new interviews, arrange schedule changes, or provide additional documentation.

Chapter Four of the *Self-Study Handbook* contains an outline of a typical schedule for a comprehensive evaluation. All comprehensive evaluations will require most of the activities outlined in that typical schedule, and the chair of the committee and the school may negotiate a different sequence of the various activities.

Commission evaluations typically begin with an afternoon committee meeting and an opening social function (typically a small reception or modest dinner) that provides an opportunity for the evaluation committee to meet the chief administrative officer and other appropriate members of the school community, to discuss the schedule, and to make any last-minute arrangements for the evaluation. The balance of the evening should be left free for the committee's working session. The first full day of the evaluation usually begins with an interview with the chief administrative officer. This interview is typically followed by individual interviews with other administrators (e.g., academic dean, business officer, student services administrator, director of the library, and chief development officer). During the two full days of a comprehensive evaluation, committee members will interview most or all full-time faculty members, representative part-time faculty members, representative groups of students enrolled in each of the degree programs, recent graduates, field placement supervisors, and members of the governing board. These interviews should ordinarily be conducted during the day, and evenings should be free for the committee to meet in executive sessions and for individual members to work on their sections of the report. On the morning of the final day of the evaluation, the committee will present to the chief administrative officer an oral report of its recommendations to the Board. It is Commission policy that this oral report be limited to reading the committee's formal recommendations. Representatives of the school may ask questions for clarification and may not otherwise engage committee members regarding their report. The chair or accrediting staff member will also review the procedures following the evaluation and preceding the Board action and remind the school representatives that this preliminary report should not be made public until the Board has acted.

While every effort should be made to have a complete schedule prepared in advance, the school should also anticipate that the evaluators may require changes in the advance schedule. The time constraints

of the evaluation may require the committee to adjust the schedule in order to gather the necessary information while on site, although meetings that have been scheduled with groups (students, graduates, trustees, field placement supervisors, etc.) will not be adjusted after the evaluation begins. Because the schedule may be changed during the evaluation, the school should alert its faculty and staff to be available on short notice during the two full days of the evaluation.

Distribution of Self-Study Reports and Related Material

The school is responsible for distributing copies of the self-study report, appendices, and all related material to the Commission office and members of the accreditation evaluation committee. Details regarding the format and distribution of the self-study are found in the Guidelines Regarding Comprehensive Evaluation Logistics. In addition to the self-study, evaluators typically receive additional supporting documentation including the current budget and the most recent audit and management letter, administrative and student handbooks, and summary assessment materials. Schools receiving joint Commission-regional evaluations are accountable to both the Commission deadlines and the deadlines of the regional agency, which may differ.

Additional Materials to Be Available during the Evaluation

Committee members should receive most of the materials they need for their work prior to the evaluation, and schools should gather supplemental reference materials for use by the committee during the evaluation. The Guidelines Regarding Comprehensive Evaluation Logistics includes a detailed list of these documents. Among these materials are copies of minutes of faculty meetings and trustee meetings (last five years), copies of prior audits and management letters (last three years), Annual Report Forms (last two years), current institutional planning documents, course syllabi, current faculty curricula vitae and samples of faculty publications, samples of students' theses and dissertations, and copies of promotional materials. This material should be available in the room set aside for committee work.

Support during the Evaluation

Most of the institution's work will be completed prior to the arrival of the accreditation evaluation committee. The institution's primary responsibilities during the evaluation itself include hosting committee

members, participating in interviews, and attending to the logistical details of the committee's stay.

The school should host the committee in ways that enable its members to remain focused on their tasks. Helpful forms of hospitality include simple amenities such as providing coffee, tea, juice, and snacks in the room used by the committee while it is on campus and placing a small hospitality basket in committee members' rooms at the hotel. Commission evaluators contribute approximately one week of time to the school on behalf of the Commission and serve without honorarium. Institutional attention to hosting committee members reflects the school's awareness of the effort these peers are making. While taking care to host the committee appropriately, schools should avoid giving gifts of value or treating evaluators in ways that could appear to be courting a positive evaluation.

A designated contact person from the school should be available to the committee chair at all times during the evaluation. The chair will depend on this person, during the day or evening, to arrange changes in the interview schedule, answer questions, secure additional documentation, etc. The school should be prepared, on short notice, to accommodate requests for changes in the schedule or for additional information. Commission committee members are judicious in their requests, but their task requires them to assess all appropriate information carefully, and they frequently discover they need information that neither they nor the school anticipated in advance.

All faculty and senior administrators, except those on leave at the time of the evaluation, should be available during the evaluation. Persons who are on leave who carry significant institutional roles (e.g., department head or program director) should be prepared to be available by Internet conferencing or conference call. If the evaluation occurs on a day when classes are not usually scheduled, faculty should be asked to be on campus or otherwise available to the committee. While the school should prepare for this availability, it should also caution individuals that the committee may not interview all of them. In the limited time of the evaluation, the committee can focus on only some of the many important issues and typically cannot meet individually with all stakeholders.

Activities Following the Evaluation

By Board policy, the chief administrative officer and others of his or her choosing will receive an oral statement of the committee's recommendations to the Board at the exit conference. After the committee leaves, the school has several remaining activities in the accreditation evaluation process, including identification of factual errors in the draft of the committee's report, preparing a response to the final report for the Board, paying the Commission invoice for costs associated with the evaluation, and completing the comprehensive evaluation of the Commission accrediting process.

Responding to the Draft Report

Following the evaluation, the chair will prepare a draft of the committee's report that includes the committee's findings, its narrative evaluation of the institution, and its recommendations to the Board. *The school should not publish any part of the draft committee report, including its recommendations to the Board.* Even the committee's final report is a communication to the Board, which the Board shares with the school, not an official action. The official action is the form of the committee's recommendation adopted by the Board.

As soon as possible after the evaluation, the chair will complete a draft of the committee's report and then send this draft to the chief administrative officer of the school for review and preliminary response. This response is limited to corrections of factual errors and should be returned to the chair of the committee. After carefully considering the school's response, the chair, in consultation with other committee members, will prepare and submit the final report to the Board. Accrediting staff will send the final report to the school with an invitation to respond. In joint evaluations with regional associations, the agent named in the joint agreement will take responsibility for sending the report to the regional agency's offices as required.

Responding to the Final Report

When the school receives the final report from the Board, there are two options for responding. One is to prepare a written response to the report and recommendations for consideration by the Board. This response, typically in the form of a letter from the school's chief administrative officer, may state the school's concurrence with the

committee's findings and recommendations, or it may challenge the committee's report and recommendations, in whole or in part. This response to the committee report is the proper forum for expressing any disagreement with the judgments of the committee or for challenging its recommendations.

The other means of response available to the school is to appear before the Board at the meeting during which the committee report and recommendations are being considered. By Commission policy, any school that has received an evaluation committee evaluation may present their concerns in person at the meeting of the Board in which the report of that evaluation is being considered for action. The school will meet with the Board workgroup considering the Board's response or with the whole Board, depending upon the nature of the school's concerns. (See *Policy Manual* [II.B.11] for further details.) The accrediting staff liaison is prepared to provide counsel to schools regarding preparation of a letter of response or scheduling a meeting with the Board.

Invoice for Evaluation-Related Expenses

Dues paid by member schools support most of the ongoing costs of Commission accreditation. In accordance with Commission policy, all travel costs directly related to an accrediting evaluation are charged to the school being evaluated, together with an assessment fee. The school will be billed for average travel costs for evaluators and staff and the assessment fee as determined by the Board and posted on the ATS website and published in the *Bulletin*. The assessment fee covers Commission costs associated with preparation for accrediting evaluations, committee expenses, and other costs related to the accreditation evaluation process. Invoices are mailed at the end of the semester in which the evaluation occurs and are payable upon receipt.

Board Consideration of Committee Reports

The Board meets in February and June. The Board typically considers reports from fall evaluations in February, and reports from spring evaluations in June. For comprehensive evaluations, the Board's decision-making process includes consideration of the self-study report, the evaluation committee report, the institutional response, and the counsel of staff present for the evaluation. The Board will take action according to formally adopted procedures and based on the

committee's report, the standards of accreditation, and actions taken with respect to other member institutions in similar circumstances.

The action of the Board, following the format of the recommendation in evaluation committee reports, will have four basic parts. The first part is an action on initial or reaffirmation of accreditation, including the length of the grant of accreditation. Second, the Board will formally act on the approval of each degree program offered by the institution, with separate actions for a distance education program and any extension site at which an approved degree can be earned. Third, the Board's action will describe areas of distinctive strength in the institution that should be sustained. Finally, the action will cite any areas where one or more elements of the standards require further attention by the school. With regard to these latter areas, the Board may impose notations or probation or require follow-up activities such as reports and focused evaluations, as appropriate.

A letter reporting the Board action will be mailed no later than 30 days from the date of the Board meeting. Actions related to accredited status, approval of degree programs, and imposition of notations and probation are published annually in the *Membership List* and on the website.

Appeal Procedures

An institution has thirty days following receipt of the Board action letter to appeal a decision. Actions under appeal are not published in the *Membership List* or on the website until the appeal is resolved. Appeal procedures vary according to the action under appeal and are fully described in the ATS Commission *Policies and Procedures*, Section XI: Appeals of Actions by the Board of Commissioners.

Evaluation of Commission Accreditation Process

After all activities related to the accreditation evaluation process have been completed, concluding with delivery of the letter reporting the Board action, the Commission invites schools to complete an evaluation of the accreditation process—from the initial staff contact through the evaluation to the Board action. Completion of this evaluation is an important contribution to the Board's own evaluative efforts to monitor its processes and procedures in service to improving the contribution of this process to the overall purpose of the Commission and the Association—the improvement of theological schools.

Checklist of Activities for Receiving a Commission Evaluation Committee

The following checklist is a summary guide for schools preparing for a Commission accreditation evaluation. It should be supplemented, as appropriate, to reflect the school's individual plans and to incorporate activities required by regional accrediting agencies, in the case of a joint or concurrent Commission-regional evaluation.

Before the Evaluation

- Prepare and distribute copies of the completed self-study report and supporting materials as directed in the Guidelines Regarding Comprehensive Evaluation Logistics.
- Contact the chair about schedule of interviews and administrative details of the evaluation.
- Confirm hotel arrangements, including single room accommodations for each committee member and a space at the hotel for committee working sessions.
- After the tentative schedule has been negotiated with the committee chair, distribute it in advance to administrative staff, faculty, governing board members, and other persons involved, with a caveat about changes.
- Plan a modest opening social event and determine the institutional representatives who will participate.

During the Evaluation

- Designate a contact person for the committee to arrange schedule changes, provide additional documentation, etc.
- Provide such transportation for the committee related to the evaluation as arranged prior to the evaluation with the chair of the committee.
- Assure availability of persons scheduled for interviews.
- Check occasionally with the committee members to be certain that they have everything they need for their work.

After the Evaluation

- Examine the draft of the committee's report carefully and send corrections of factual errors (inaccuracies or misrepresentations) to the committee chair within the time frame set out in the Guidelines Regarding Comprehensive Evaluation Logistics.

- Send a response directly to the Board following receipt of the final report. This response is the proper forum for expressing agreement or disagreement with the interpretations, judgments, or recommendations of the evaluation committee and for raising issues that the school would like the Board to be aware of when it considers the committee's report. Schools are not required to respond, but some response is desirable.
- If preferred, arrange to send a representative to the Board's meeting at which the evaluation committee's report and recommendation will be considered. Schools wishing to have representation at the Board meeting should make the request directly to the accrediting staff, who will schedule a time during the Board meeting for the institutional representatives.
- Complete the evaluation survey form that will be sent by accrediting staff after the school has been notified of the Board's formal action.

Guidelines Regarding Comprehensive Evaluation Logistics

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

Self-Study Report

Length

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

Line Spacing and Format

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

Distribution

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

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

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

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

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

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

The Evaluation Committee

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

Transportation

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

Accommodations

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

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

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

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

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

Documentation

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

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

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

Materials to Accompany the Self-Study

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

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

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

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

Items to Provide in the Documents Room

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

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

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

Time Lines

Before the Evaluation

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

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

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

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

After the Evaluation

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

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

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

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

After the Meeting of the Board of Commissioners

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

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

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

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