Practical considerations for an external review and site visit of a doctoral program

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Purpose of your external review

• Marlo Welshons’s slides say “why” with eloquence
• Provides a baseline for new a program director or dean
• Also consider tertiary and strategic reasons
  – Internal and external politics
  – Transitions in leadership
  – Faculty shifts
  – Curricular shifts
  – Self promotion for internal and national rankings
  – More …
At the planning stages

• Review previous external reviews on file
• Review Welshon’s slides from GADE, 2017
• Proceed only with administration support
• Get funding for travel, meals, and honorarium
• Buy-in from faculty and students
• Develop short list of potential site visitors
• Strategize about who and when to do review
• Ask constituencies about preferred choices
Preparing the invitation

• Consider them an honored guest, plan dates and accommodations accordingly
• Do some research about the person
• Determine costs to bring person to campus
• Develop a scope of work for the site visit
  – What you will provide, what they will do
• Select dates to optimize opportunities to meet faculty, students, and programs
• Develop some preliminary questions
Advance material for reviewer

• Prepare a comprehensive briefing book in both electronic and hard copy (good prep for them and your team)
Some potential briefing book content

- Statement of intent or Program’s mission
- Admissions process and forms
- Handbook/policies for students and faculty
- Syllabi for required and elective courses
- Special programs (joint programs)
- Marketing material
- Financials (budget, reports, financial aid)
- Student census
- Student biosketches, completed dissertation abstracts, achievements and external pre-dissertation and postdoctoral awards
- Mentorship plans
- Meeting minutes
The invitation

• Determine best person to call or send the invite
  – Doc Program Director, Dean, who else?
• Explain why you are asking them to review
• State what you’ll provide, what is expected of them
• Offer advance material including some preliminary questions to frame the program review
• Offer some dates or potential windows for the review
• If you get turned down, the invitation may have as much value to your school as an actual site visit
• Be timely in your correspondence
Some questions that we had in 2014

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The site visit

- Create a tight, realistic schedule
- Designate a team of committee to host reviewer
- Provide your contact information as contact person, be “on call” should anything occur
- Plan all transportation
- Schedule key individuals and constituencies
- Plan dinners and lunch receptions with faculty staff and students
- Show your strengths, be candid about concerns
- Get adequate face-time with team or Doc Committee
Develop an easy to read schedule

<table>
<thead>
<tr>
<th>Time</th>
<th>Activity</th>
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<tbody>
<tr>
<td>4:00 – 4:45</td>
<td>Interdisciplinary opportunity with Harvard School of Public Health</td>
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<tr>
<td>4:45 – 5:00</td>
<td>Marie C. McCormick (MD, ScD; Harvard faculty), Peter Maramaldi</td>
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<tr>
<td>5:00 – 5:45</td>
<td>Interdisciplinary student research</td>
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<tr>
<td>5:45 – 6:00</td>
<td>Shuei Kozu (Neurology) Dana Prescott (Law), Erina White (epigenetics)</td>
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<tr>
<td>6:00 – 6:45</td>
<td>Local alumnus</td>
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<tr>
<td>6:45 – 7:00</td>
<td>Elizabeth Warf</td>
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Peter Maramaldi, GADE, 2017
Simons School of Social Work
Debriefing with external reviewer

• Allow time for them to meet with dean
• Schedule formal debrief with team/committee
• Ask lots of questions, keep notes
• If there is anything you want highlighted in written report, ask for it to be included
• Remember that the report of the external review will live beyond your tenure in the program; Shape it to be helpful
After the external review

• Make sure reimbursements and honorarium are processed and sent out
• Send any follow up communication, questions, or exculpations in a timely manner
• When the report comes in release it according to prearranged plan
• Leverage the findings to move your program. Faculty, and students forward
Please remember that program reviews can help cut through all the ...