WASC | Senior College and University Commission

Methods for Gathering Information and Evidence during Institutional Visits Guide

revised July 2023

When serving on a team, you will meet with administrators, faculty, staff, students, and other institutional constituents. During the visit, these meetings are crucial for gathering information, answering questions, and understanding institutional contexts or nuances to inform the team's report. During the visit, you will not have a lot of time to meet with everyone, so getting the most out of each meeting is essential. This guide is intended to help your team prepare for these meetings and ask questions that will result in useful information.

Some Methods for Gathering Information and Evidence in Meetings

Interviews

The team will convene as a whole to meet with specific individuals and groups, such as the governing board, and will also break into pairs or small groups to meet with various institutional stakeholders concurrently. To ensure maximum productivity during these interviews, consider implementing the following strategies:

1. Together with your team, plan what you would like to get out of the interview.
2. Prepare a set of questions. (See "Sample Questions" below.)
3. Start with the easier questions to break the ice; work up to more challenging, uncomfortable ones.
4. Questions can be:
    - Broad: "What happened when the president abruptly resigned?"
    - Narrow: "How did you manage the capital campaign after the president's sudden departure?"

5. Formulate questions that elicit information (descriptive questions), stimulate analysis (cause-and-effect questions), or require evaluative judgments (normative questions). For example:
    - Descriptive questions: "How do transfer students fulfill their general education requirements?"
    - Cause-and-effect: "Why do some transfer students do so well and others have such problems with general education outcomes?"
    - Normative questions: "How well do transfer students meet your expectations for general education outcomes?"

6. Beware the typical pitfalls of interviewing
    - Avoid binary, yes/no questions when possible.
    - Avoid "all" or "none" questions: Instead of "Are all your students exposed to diversity through the curriculum?" it's more informative to ask: "What percentage of your students takes courses with diversity content?"
    - Avoid leading questions: "So when did your faculty finally get on board with assessment?"

- Avoid putting words in the interviewee's mouth: "Introducing assessment was a nightmare, wasn't it?"
- Avoid double-barreled questions; they produce one answer to two questions: "Did your students participate in service-learning projects and become much more committed to civic values?"
- Avoid language that suggests a socially acceptable answer: "Just about every institution is doing assessment now. How about you?"
- Avoid loaded words: "dead wood," "mindless bureaucrats," "stupid turf wars," and the like.

7. Follow the plan for the interview, however – if the question isn't understood, paraphrase; if a new topic comes up that may be relevant, pursue it.
8. Let the interviewee do the talking; don't interrupt except for quick clarifications.
9. Feel free to steer the conversation back to the topic if the interviewee is wandering.
10. Avoid the temptation to act as a consultant and give advice.
11. Engage in active listening by paying full attention to the participants, their comments and suggestions.
12. Do ask the "debriefing" question at the end: "Is there anything else you'd like to say?"
13. Remain friendly and attentive but neutral.
14. Be aware of your own body language and the participants'.
15. Manage the time effectively to stay within the allotted schedule, allowing the team to transition promptly to the next meeting.
16. Take good notes.

Tips for Effective Interview Questions

- **Open, not closed**: Open questions are designed to encourage narrative on the part of the interviewee and conversation. Closed questions typically result in a precise answer, such as "Yes" or "No."
  - *Example*: (to students) "What are the qualities of your school that you like best and why?" versus "Do you like your school?"
- **Phrased to understand, not to judge**: Most often you will be seeking to learn more about the institution so that later – when you write the team report – you may make informed judgments. Questions phrased to illicit explanation versus those that hint, or state pre-conceived judgments may result in more useful and meaningful information.
  - *Example*: (to a faculty committee) "Tell us how the committee went about formulating this policy. What were the important considerations and decisions you made?" versus "What were you thinking when you included the phrase about compensation in the policy? It doesn't seem relevant."
- **Focused and rigorous, versus "beating around the bush":** If there is specific information you are seeking, be focused in your questions versus hoping that participants can guess what you're trying to learn.
  - *Example*: "Please explain how you selected the members of your advisory boards – what kinds of people were you seeking and why?" versus "Tell me about your advisory boards."
- **Ask for concrete examples**: Concrete examples will provide you with a glimpse into the specific practices of the institution (what they do, which may be different from what they say they do).
  - Example: (to students) "What are some specific experiences you have had with your advisor that have helped you succeed here?" and "Please walk us through the orientation you had as a new student here."
  - Example: (to faculty) "What are some specific learning assessment activities that you've participated in? What did you do?" and "Tell us about the last three issues that the faculty senate has acted on recently – what were they, and how did the decision-making process work?"

Large Group Meetings

Open meetings are scheduled so that the team can interact with faculty, students, staff, and other constituencies. These meetings can be useful, but they also entail risks: the audience may be unrepresentative, discussion may be dominated by a few strong personalities, the range of topics may end up very narrow, and team members may not be able to steer discussion toward the issues they most want to hear about. Be aware of these risks as you lead large group meetings. Also, be sure to let the participants know about the confidential email account where they can submit their written comments to the team if they are uncomfortable sharing information in a large group setting or if they have additional thoughts after the session concludes.

Planning for and Facilitating Meetings

Prior to the Meetings

- Have clarity about what you are seeking to learn or understand as a result of each meeting. You may want to confirm or clarify information presented in the institutional report; or understand internal procedures, or how decisions are made, or how people experience certain aspects of the institution; or you may want to investigate a particular set of practices more deeply. Begin with the end in mind: When the meeting is over, what will you want to have learned?
- Identify a method or strategy to best meet your needs. (See "Methods" below.)
- Develop questions and possible follow-up questions accordingly in advance of the meeting. If you have 3-5 key questions prepared, you can use them to help guide the conversation to ensure that you leave the meeting having learned what you wanted to learn. (See "Sample Questions" below.)
- Work as a team to identify key questions for the meeting, recognizing that time for each session is limited and not all questions can be addressed.
- Determine in advance which team member will take the lead for each meeting, facilitate the discussion, and manage the time.

During the Meetings

- Have the facilitator begin by asking for introductions, sharing the general purpose of the WSCUC visit and this specific meeting, and stating what the team is hoping to learn as a result. This will prepare participants for the nature of the meeting and will help prevent meeting hijackers (people who come to a meeting with their own agendas).
- Develop rapport with the people you are meeting with by exhibiting objectivity, fairness, courtesy, and respect for their time, expertise, and various points-of-view.
- Reference reports or documents the institution has submitted if helpful.
- In group meetings, manage participants who over- or –under-participate by asking a question such as: "We would love to hear some other voices on this topic – would someone else be willing to share their perspective or experience?"
- Prior to asking a question, you could informally poll participants to get a sense of participation or agreement with a statement.
    - *Example*: "How many of you have attended a faculty meeting in the last year?" prior to asking, "Can you tell us about how the agendas of these meetings are determined?"
- Listen carefully and confirm your understanding by paraphrasing back to participants what you think you heard.
- Take notes so you can refer to them when writing the team report.

- Conclude by giving the participants the opportunity to share anything else (positive or negative) that may be relevant.
    - *Example*: "Is there anything else you think would be helpful for our team to know about your institution?" or more specifically, "Is there anything else about how your institution works to retain your students that you think would be helpful for us to know about?"
- Identify any high-priority follow-up questions you may have for particular individuals and groups; you may be able to find time during the visit for additional meetings if the team deems it necessary.

Some Audience- Specific Sample Questions

Possible Questions for Faculty

1. What do you see as this institution's greatest strengths? Greatest challenges?
2. How would you describe the current climate at this institution?
3. Do you feel supported as members of the faculty in terms of your research, teaching, service and professional development?
4. How would you characterize communication between the administration and faculty? Between the senate and faculty?
5. What are some specific ways that the program you teach in has been improved? What has led to these improvements?
6. What kinds of professional development resources does the institution provide faculty?
7. What is the timeline, process, and criteria by which you are evaluated?
8. How do new programs or curricular changes come about? What are some specific examples?
9. How well are student services and academic support departments providing appropriate educational services for your students? What are some examples of effective programs?
10. How do you assure that students have achieved the desired learning outcomes you have set for them?
11. Is there anything you think we should know that we haven't asked?

Possible Questions for Students

1. Why did you choose to attend this institution? What made it feel like a place you wanted to be?
2. What are some specific experiences you have had here that have helped you succeed?
3. What are some experiences you have had here that have been problematic or challenging?
4. Do you feel supported as a student in terms of your academic program? In terms of services that the institution provides?
5. If you could provide one recommendation to the administration and faculty to improve the student experience, what would it be and who would be most helped by it?
6. What skills and knowledge are you expected to acquire as a student at this college/university?
7. Are you acquiring the skills and knowledge you are expected to acquire?
8. To what extent is the faculty available and helpful to you?
9. What do you like best about this college/university? What could be improved to provide a better educational experience?
10. Would you recommend this institution to a friend? Why or why not?
11. What, if anything, has been different from how the institution describes itself on its website and in its materials?

12. Either you or your family is paying for this education. Are you getting your money's worth? Why / why not?
13. Is there anything you think we should know that we haven't asked?

Possible Questions for the Governing Board

1. What about the institution are you most proud of as a board member?
2. As a board member, what keeps you up at night?
3. What significant changes have you seen in the past # years? Why were they made, and how effective have they been?
4. How has the board been involved in the self-study process for accreditation?
5. What is your vision for this institution? Where would you like to see it in five years?
6. How does the board ensure the long-term sustainability of the institution? How is the board addressing the changing ecology of higher education?
7. Tell us about the process you have in place to review the president's performance and discuss the effectiveness of the performance.
8. What are the biggest challenges facing the institution at this time? How will those challenges be addressed?
9. What are the biggest challenges facing the board at this time? How will those challenges be addressed?
10. What are the non-financial measures that this board is focused on?
11. How do you know if the board is being effective?
12. Is there anything you think we should know that we haven't asked?

Possible Questions for the CEO

1. What have been the most significant changes you have seen at the institution in your time as president?
2. What are some of the major themes and key priorities in the institution's future planning discussions?
3. How would you describe the current climate at the institution? Current morale among faculty and staff?
4. What is your assessment of the institution's finances?
5. What are the top three issues currently facing the institution?
6. How are the findings from the institutional report you submitted to WSCUC shaping or influencing the campus's planning?
7. Is there anything you think we should know that we haven't asked?

Rev. July 2023