Offsite Review (OSR) Summary of Lines of Inquiry Guide

Standards:  2013  2023

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| **Directions:** This form is to be completed by the team at the conclusion of its daylong Offsite Review of the institutional report and supporting materials. The form will be sent to the institution within one week by the WSCUC liaison, and a response to section IV will be sent back from the institution eight weeks in advance of the Accreditation Visit. This form can be in a bulleted list, outline or narrative format. Please do not delete this first page, i.e., this cover page. Instead, complete information as requested and submit it with the Lines of Inquiry. |

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| Offsite Review (OSR) |
| Institution under Review: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Date of Offsite Review: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Team Chair: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

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| The Offsite Review team recommends the following actions be taken:  \_\_\_ Proceed with the Accreditation Visit scheduled in: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_ Reschedule the Accreditation Visit to: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_    The reason(s) the Team recommends rescheduling the visit is/are: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  ­­­­­­­ |
| **Due date for institutional response to Section IV (specify exact date):** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

# Sample Outline

1. Overview of the lines of inquiry. Please include the following language in this section:

This document identifies [X] lines of inquiry for the Accreditation Visit (AV) that are derived from the institution’s report. In addition, this document includes questions or issues the team discussed during the Offsite Review (OSR) that may be pursued during the visit. The team does not expect or invite a written response to these questions before the Accreditation Visit. The only written materials that the team expects from the institution before the visit are those listed in Section IV: “The team requests that the institution supply the following additional documents and information before the Accreditation Visit.”

1. Commendations. The team commends the institution for the following accomplishments and practices:
   1. [Commendations can be in a bulleted list, outline or narrative format.]
2. Lines of inquiry. The team has identified the following lines of inquiry for the Accreditation Visit:
   1. [Include the lines of inquiry here in a bulleted list, outline or narrative format.]
   2. [For each line of inquiry, describe the specific aspects that will be pursued during the visit.]
3. Request for additional documents and information. The team requests that the institution supply the following additional documents and information before the Accreditation Visit:

Please include the following language in this section:

“The only written documents and information the team expects before the visit are listed in this section. The team does not expect or invite a written response to any of the questions posed or issues raised in other sections of this form.”

* 1. [Include the requested documents or information in a bulleted list, outline or narrative format.]

1. Individuals and groups to meet during the visit. The team requests that the following groups and individuals holding the specified positions be included on the schedule for the Accreditation Visit.
   1. [Include the requested individuals or groups in a bulleted list, outline or narrative format.]
   2. [Include this sentence: “In developing the schedule for the visit, the team may identify additional individuals or groups with whom they wish to speak.”

# Guidelines

## **For Teams**

By the end of the Offsite Review (OSR) evaluation team members will have begun plans for the Accreditation Visit (AV). A resource to help the team with the planning process is the *Summary of Lines of Inquiry: Offsite Review*. This form reflects issues for follow-up and questions to pursue during the AV, and requests additional information or documentation before the visit.

Teams are asked to:

1. Review the form at the start of the Offsite Review to be reminded about the expected outcome for the day.
2. Avoid preparing a Summary of Lines of Inquiry that could trigger a narrative response, particularly anything lengthy, or other kind of extensive report from the institution.
3. Use the process of completing the form to make sure that the requested information and/or documentation are not already addressed in the institutional report and supporting materials.
4. Record the lines of inquiry for the Accreditation Visit that surfaced during the Offsite Review in section III of the form. Describe each area and the specific aspects that will be pursued during the visit. If helpful and relevant, the team may want to organize the lines of inquiry by the institutional report sections (though, this is not required). The lines of inquiry can be in a bulleted list, outline or narrative format.
5. Reinforce with the institution, during the OSR video conference and on the form, that while institutions may be tempted to address the lines of inquiry from section III in an institutional response, they should not do so (typically the chair fulfills this role).
6. Use section IV of the form to request that the institution supply additional documents or information. If helpful and relevant, the team may want to organize these requests by the institutional report sections (though, this is not required). The form should clarify which documents and information will be needed in advance of the visit and which may be made available when the team is onsite.

* Request information directly (e.g., ”Please provide the process and timeline for developing the new Strategic Plan”) or use a question to solicit the information from an institutional response (e.g., “What was the process you used to develop your new Strategic Plan and what was your timeline?”).
* Keep in mind that this process should not invite a narrative, particularly anything lengthy, or other kind of extensive report from the institution.

1. Use section V of the form to request the groups and individuals holding the specified positions be included on the schedule for the Accreditation Visit. This will likely be a bulleted list but can include a brief explanation, i.e., one or two sentences describing the reason(s) for wanting to meet with those listed. If helpful and relevant, the team may want to organize this section by the institutional report sections (though, this is not required).
2. Complete the form no later than one week following the Offsite Review. It is most useful if the form can be completed at the end of the daylong Offsite Review. Please submit the completed form to the WSCUC liaison who will distribute it to the institution.

In Summary:

* 1. The team will send the *Summary of Lines of Inquiry: Offsite Review* form to the WSCUC liaison preferably at the end of day of the Offsite Review, but no later than one week following the Offsite Review;
  2. The form should not trigger any kind of lengthy narrative or report by the institution;
  3. The form will include:
     1. Commendations;
     2. Lines of Inquiry for the AV;
     3. Requested additional documentation and information, clarifying which is due in advance of the AV and which may be made available during the AV;
     4. Requested groups and individuals to be included in the schedule for the AV.
  4. The only written documents and information the team expects before the visit is listed in section IV. The institution should not provide a written response to any of the questions posed or issues raised in other sections of the form;
  5. Documents and information required in advance are submitted through box.com eight weeks before the start of the AV.

## **For Institutions**

1. The Lines of Inquiry form can serve as a planning tool for the institution as they prepare for the Accreditation Visit.
2. The only written documents and information that the team expects in response to the Lines of Inquiry are listed in section IV. The team does not expect or invite a written response to any of the questions posed or issues raised in other sections of the form, even though institutions may be tempted to do so.
3. The institutional response is due eight weeks before the start of the Accreditation Visit.
4. Institutional responses are submitted through box.com. About ten to twelve weeks before the visit, the institution will be provided with a link to a folder on box.com. The institution’s response to the Summary of Lines of Inquiry can be uploaded to the folder. Once the response has been uploaded, WSCUC staff will share the materials with team members.

*Revised, July 2023*