**Administration & Finance Program Reviews**

**Full Program Review Self-study Checklist**

**(Updated Spring 2017)**

The following material should be included in the self-study that is completed by the unit head and presented to the committee chairs and members at least two-weeks prior to the first program review committee meeting.

**Most importantly, the materials should reflect the results of the unit’s self-study including its strengths, weaknesses, and future improvement plans.** The binder may either be in hard copy form (an actual binder) or, preferably, a collection of electronic documents presented to the committee on CD.

The materials *must* include:

* Unit mission, vision, and values.
* Goals and objectives
  + All units should include its list of key ongoing goals/objectives/initiatives.
* An update on the previous program review’s recommendation
  + The self-study binder must contain a report on the status of all recommendations that were approved as part of the unit’s previous program review.
* Policies & Procedures manual
  + All units should provide an *up to date*, complete policies and procedures manual. This consists of unit policies and step-by-step procedures for *all* critical unit functions. Detail is important.
* Up to date organizational chart
* Position descriptions and EWP’s
  + All units should provide up to date position descriptions for every position in the unit. For classified employees, these will be EWP’s, for A&P faculty they will be job descriptions
* S.W.O.T. Analysis**\***
  + All units should provide the results of a unit-wide SWOT analysis. Members of the unit should join together to create the SWOT analysis.
    - **S**trengths: What are the unit’s top 5-7 strengths?
    - **W**eaknesses: What are the unit’s most significant 5-7 weaknesses? (This would include such issues as being under-staffed, under-budgeted, insufficiently trained, etc.)
    - **O**pportunities: What problems, challenges, changes, external forces exist now or will exist that will provide opportunities to meet new needs, develop new services, etc.
    - **T**hreats: What issues threaten the unit’s ability to succeed now and in the future?
* Key customers, customer groups, constituents
  + All units should provide a list of key customers and constituents. This should include both key units and key individuals. This is to help the committee conduct its own research.
* Key peer groups and contact information
  + There should be a listing of key peer groups (at other institutions) with contact information. These may be key Virginia institutions, or, may expand to the university’s recognized peer groups of institutions outside the state.

Depending on the unit, the self-study materials may also include:

* Relevant budget Information – this is particularly important if the unit head believes the unit is under-funded.
* Accomplishments – including measurable data
* Internal audit reports (if appropriate)
* Samples of customer interaction activities including any past customer research
* Survey data from previous surveys conducted by the unit
* Recommendations for questions to be asked as part of customer surveys and focus groups

Program Review Committee chairs are free to require whatever additional self-study information is needed, in their view, to provide the most helpful data for making the strongest recommendations for quality improvement, whether they are listed above or not.

***\*NOTE: if the unit prefers to obtain a facilitator to conduct a SWOT analysis, the unit head may contact Talent Development to arrange a meeting to complete the SWOT analysis.***