**Administration & Finance Program Reviews**

**Full Program Review Self-study Checklist**

**(Updated Summer 2023)**

The following material should be included in the self-study that is completed by the unit head/director 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 materials should be submitted electronically to the appropriate SharePoint site as provided by the Program Review Coordinator.

The materials *must* include:

* Unit mission, vision, and values
* Goals and objectives including current status and next steps
	+ By status we mean 1) completed, 2) in process, 3) no longer relevant
	+ By next steps, please describe the steps you will take to complete the objective
	+ All units should include its list of key ongoing goals/objectives/initiatives.
* An update on the previous program review’s recommendations including status and next steps
	+ The self-study must contain a report on the status of all recommendations that were approved as part of the unit’s previous program review including next steps.
	+ This section should be completed as described for the goals and objectives noted above including status and next steps
* Policies & Procedures manual - OPTIONAL
	+ All units may 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 - OPTIONAL
	+ All units may 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
* SWOT 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?
		- The unit head/director should recommend at least two new Star Tool objectives based on the SWOT results that would need to be completed during the subsequent planning cycle.
* 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.
* A recommended External Reviewer from another university who can visit the unit, research findings and make recommendations to assist the committee

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 including survey results
* Survey data from any other previous surveys conducted by the unit
* Recommendations for questions to be asked as part of customer survey or employee survey and focus groups

Program Review Committee chairs are free to require whatever additional self-study information is needed 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.***