THE THIRD TIME IS THE CHARM

Southern Association of Colleges and Schools Commission on Colleges

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Lessons Learned From Reaffirmation

THE THIRD TIME IS THE CHARM

- There are numerous ways to plan for fifth year interim report and the decennial Compliance Certification.
- The need for careful development of a structured plan to guide the project is essential.

Why is Advance Planning Important?

- The plan includes multiple timelines and spans years.
- The project involves a variety of constituents from multiple divisions who are involved in the project at varying levels.

What is Required for Good Planning?

- An objective view
- Flexibility
- The ability to realize when a plan is not working

FOR DISCUSSION TODAY



What Actually Happened

What We Learned

TOPICS FOR DISCUSSION

- Creating a Timeline
- Coordinating Narrative
- Creating Documentation
- Managing Edits
- Producing the Report
- Monitoring between Reports

CREATING A TIMELINE

What We Planned

Developed a ambitious timeline

INITIAL TIMELINE

Draft Timeline for SACS

Updated 1/20/10

Phase I = Due August 2010 Phase II = Due January 2011 Phase III = Complete report (Phases I & II with edits) Phase IV = Complete report with final evidence

	2011
January	10 – Receive Phase II
	31 - Complete Phase II first level edits (KS)
February	1 – Begin Phase II review by Herb & Ann
	15 – Complete Herb & Ann edits to Phase II (KS)
March	10 – Deliver reports to Dr. Rose
April	(Faculty credentials committee to review fall 2010 faculty rosters)
May	23 – Final revisions to Phase I complete (exported from Xitracs)
	23 – Receive faculty review summary from committee
June	27 – Receive comments from Dr. Rose on Phase II
July	
August	
September	
October	10 – Final revisions to Phase II complete (exported from Xitracs)
November	17 – Review of Phase III by all
	(Faculty credentials committee to review fall2011 faculty rosters)
December	12 – Receive faculty review summary from committee

CREATING A TIMELINE

What Happened

- Did not meet all early deadlines
- Did not adjust remaining deliverables accordingly

CREATING A TIMELINE

What We Learned

- Communicate deadlines early and often
- Have a single master timeline
- When adjusting the timeline, use past experiences

COORDINATING NARRATIVE

What We Planned

- Assign standards to administrators with expectations that they would delegate writing responsibilities and review content
- Provide general guidelines for content, including examples from other schools
- Repurpose prior (approved) narrative

James Madison University SACS Reaffirmation Compliance Certification Guidelines

The narrative you're writing for the SACS Reaffirmation Compliance Certification Report will be combined with sections from other writers to create a single comprehensive report. At that time, the editors will ensure that the tone, style and formatting are consistent.

For this draft, focus on drafting a clear, concise narrative that illustrates how JMU is in compliance with the requirement you have been assigned. It is not enough to say that the university meets the requirement; your response must provide:

- details on how JMU meets the requirement
- examples of documentation showing that the requirements are met.
- when possible, documentation of the process being followed

For example, 4.5 states: The institution has adequate procedures for addressing written student complaints and is responsible for demonstrating that it follows those procedures when resolving student complaints. A response should include:

- Narrative stating that JMU meets this requirement
- The source where information on the policy is located, such as a specific page of the undergraduate catalog
- An example that the policy has been followed, such as an incident report or series of emails
- This level of detail is not required for all responses, but should be attempted for any response referencing JMU practices.

Focus on content and examples for this draft. Your text should be well written and free of errors in content – we'll clean up formatting and stylistic issues during a first review. Text submitted for this draft must:

- Be concise and accurate
- Be well-written, readable and understandable to a group of peers who may have no knowledge of the institution
- Be clear so that its analyses and conclusions are understandable to the institutional community and others.
- Provide ample description supported by relevant and recent documentation

Style Conventions:

- Write in the third person
- Use "the university," not "we"
- Use subheadings as appropriate, but no more than two levels
- Label all tables with a number and name (i.e., Table 2.8-1: Student Tutors).

Formatting Conventions:

- Do not use automatic hyphenation
- If you are including tables, format them simply in Word. Do not use shading or elaborate lines.
- Use a sans-serif font (Times New Roman) in 12 point for body copy.
- Use a sans-serif font (Times New Roman) in 18 point, bold for main headings.
- Single space all text.

James Madison University SACS Style Guide

The following is a list of style conventions to use in writing the SACS self-study report. In most cases, the style guide follows the AP Style book and JMU editorial style guide. However, in some cases the style shown is different from AP and the established JMU style because it is either mandated or unique to the SACS report. If you have any questions not covered by the style guide, contact Kristi Shackelford at shackekl@jmu.edu.

Item	Style	Example
Abbreviations and Acronyms	Do not use abbreviations or acronyms the reader cannot recognize. Generally, abbreviate or use an acronym after first using the formal name. Do not include the abbreviation if it is not used later in the same statement. Omit periods unless the result would spell an unrelated word.	The College of Integrated Science and Technology (CISAT) is committed The CISAT campus is located
	Abbreviate junior or senior after an individual's full name but do not set it off with a comma; abbreviate company, corporation, incorporated and limited when used after the name of a corporate entity but do not set it off with a comma.	John J. Smith Jr.; Nabisco Brands Inc.; Upjohn Co.
	Abbreviate a year by using an apostrophe instead of the first two figures.	1976; '76
Academic Degrees	Use an apostrophe in bachelor's degree and master's degree.	Smith received his bachelor's degree from Harvard and master's degree from JMU.
	An academic abbreviation is set off by commas when used after a name; do not precede a name with a courtesy title for an academic degree and follow it with the abbreviation for the degree in the same reference.	Daniel Moynihan, Ph.D., spoke Dr. Pam Jones, a chemist, spoke
	When spelling out the degree title use uppercase for the degree title but not for the subject; abbreviations may also be used.	Sue has a Bachelor of Science degree in public administration. Sue has a B.S. degree in art.
		The College of Business offers a Bachelor of Business Administration degree in marketing.
	JMU offers the academic degrees listed to the right in alphabetical order with correct abbreviations.	 Undergraduate Degrees Bachelor of Arts (B.A.) Bachelor of Business Administration (B.B.A.)
		 Bachelor of Fine Arts (B.F.A.) Bachelor of Individualized Study (B.I.S.)

	Bachelor of Music (B.M.)
	 Bachelor Science (B.S.)
	 Bachelor of Science in Nursing (B.S.N.)
	 Bachelor of Social Work (B.S.W.)
	Graduate Degrees
	 Doctor of Audiology (Au.D.)
	 Doctor of Musical Arts (D.M.A.)
	 Doctor of Philosophy (Ph.D.)
	 Doctor of Psychology (Psy.D.)
	 Educational Specialist (Ed.S.)
	 Master of Arts (M.A.)
	 Master of Arts in Teaching (M.A.T.)
	 Master of Business Administration (M.B.A.)
	 Master of Education (M.Ed.)
	 Master of Fine Arts (M.F.A.)
	 Master of Music (M.M.)
	 Master of Occupational Therapy (M.O.T.)
	 Master of Public Administration (M.P.A.)
	 Master of Physician Assistant Studies (M.P.A.S.)
	 Master of Science (M.S.)
	 Master of Science in Education (M.S.Ed.)
	 Master of Science in Nursing (M.S.N.)
Listed to the right are JMU's academic divisions	College of Arts and Letters
	College of Business
	College of Education
	College of Integrated Science and Technology
	College of Science and Mathematics
	The Graduate School
	University Studies
Capitalize formal titles such as professor only	Professor Jan Jones has joined our faculty.
when they precede a name; lowercase elsewhere.	Our faculty welcomes Jan Jones as the
Do not use in second reference	professor of history.
	Jones formerly served as head
Use to refer collectively to departments, schools and degree-granting programs.	All academic units are required to
Use to refer collectively to department heads,	
	Capitalize formal titles such as professor only when they precede a name; lowercase elsewhere. Do not use in second reference Use to refer collectively to departments, schools and degree-granting programs.

James Madison University SACS Reaffirmation Compliance Certification Report Format Guide

The following is a list of format conventions to use in writing the SACS reaffirmation compliance certification report. These formats are either mandated by SACS or decided on by the Steering Committee for consistency. If you have any questions not covered by the format guide, contact Kristi Shackelford (shackekl@jmu.edu).

Our goal is to format the documents as simply as possible. Standard formatting will be applied when the individual portions are combined into a single report.

Item	Format	Example
Automatic Hyphenation	Do not use	
Bullets	Use square bullets	Example:
	Any level of indention is fine	BulletBullet
Citations	For this version, do not follow a specific style guide for citing sources. Use brackets within text to document sources Include all information necessary to reference the source: complete URL; publication title and page; specific table or figure number, etc. If you are referencing a portion of a larger document – such as one paragraph from a long Web page – indicate the section with	Students on academic probation must submit their re-entry applications to the director of Academic Student Services [http://www.jmu.edu/catalog/10/genera l/policies.html#reentry; "Students on Academic Probation].
Figure and Table	the appropriate heading or opening text.	Table 34.3-1
Titles	Label figures/tables as section number - order of image	Board of Visitors Program Review
	Name all figures/tables clearly	
	Should be bold, 11pt. Times, centered over the figure or table.	
	Put figure and table number on a separate line.	
 Formatting 	Create all tables in Word (not Excel)	
	Format tables as simply as possible – do not use shading or elaborate lines	
	Use page breaks to force figures/tables to single pages, even if this leaves excessive space on previous pages	

Item	Format	Example		
Font and Type	Font and Type The font used throughout the report is Times or Times New Roman. The size and style (bold, italics, etc.) change depending on	Headers: Times New Roman 10		
		Headings 1: Times 14 Bold		
	the section and level of text (body copy,	Centered, All Caps		
	titles, headings, headers, etc.)	titles, neadings, neaders, etc.)	titles, neadings, neaders, etc.)	Headings 2: Times 12 Bold
		Left, Sentence style		
		Headings 3: Times 11 Bold		
		Left		
		Body text: Times 11, left justified with ragged right margin		
		Table & Figure titles: Times 11 bold, centered		
		Footers: Times 10		
Headers/Footers	Do not use headers	3.4.3 7/30/10 1		
	In the footer, include:			
	Section Number			
	Date of submission			
	 Numeral page number 			

COORDINATING NARRATIVE

What Happened

- Examples and reference guide we provided were out of date/in flux
- Narrative received needed more information than generally provided
- Had to go directly to content experts for details and examples

COORDINATING NARRATIVE

What We Learned

- Start with the subject matter experts (SMEs), regardless of their level, when possible
- Provide writers with examples from other universities with caveats
- Provide writers with detailed outlines based on an updated reference guide

REVIEWER TEMPLATE -NARRATIVE

2.5 The institution engages in ongoing, integrated and institution-wide research-based planning and evaluation processes that (1) incorporate a systematic review of institutional mission, goals and outcomes; (2) result in continuing improvement in institutional quality and (3) demonstrate the institution is effectively accomplishing its mission. (Institutional Effectiveness)

The institution engages in

- ____ongoing,
- _____integrated and
- _____institution-wide
- _____research-based
- ____planning and
 - _____evaluation processes that
 - ____(1) incorporate a systematic review of institutional mission, goals and outcomes;
 - (2) result in continuing improvement in institutional quality; and
 - _____(3) demonstrate the institution is effectively accomplishing its mission.

Relevant Questions for Consideration:

How are the institution's systematic, ongoing, integrated and research-based (data-based) reviews
conducted?

_____How does the institution describe its planning and evaluation process?

_____What evidence exists that the institution-wide planning and evaluation processes incorporate a systematic review of institutional mission, goals and outcomes?

_____What evidence exists that the institution-wide planning and evaluation processes demonstrate that the institution is effectively accomplishing its mission?

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The institution engages in

_____ongoing,

_____integrated and

_____institution-wide

_____research-based

_____planning and

_____evaluation processes that

(1) incorporate a systematic review of institutional mission, goals and outcomes;

_____(2) result in continuing improvement in institutional quality; and

(3) demonstrate the institution is effectively accomplishing its mission.

Relevant Questions for Consideration:

_____How are the institution's systematic, ongoing, integrated and research-based (data-based) reviews conducted?

____How does the institution describe its planning and evaluation process?

_____What evidence exists that the institution-wide planning and evaluation processes incorporate a systematic review of institutional mission, goals and outcomes?

_____What evidence exists that the institution-wide planning and evaluation processes demonstrate that the institution is effectively accomplishing its mission?

_____How does the institution demonstrate a sustained, documented history of planning evaluation cycles, including the use of results for improvement to accomplish the institution's mission?

_____Is there appropriate institutional research and budgetary support for assessment programs through the institution?

_____What is the evidence that data from various sources concerning the effectiveness of programs and services are being used to make decisions for improvement?

—How is the institutional effectiveness process related to the budget?

_____Are appropriate internal and external constituents and stakeholders involved in the planning and assessment process?

Required Documentation:
Description of the institutional effectiveness process
Documentation that shows that the process includes a systematic review that results in continuing
improvement and demonstrates the extent to which an institution accomplishes its goals.
Other Types of Documentation:
Evidence of linkage of institutional effectiveness to institutional mission
Documentation that the institution has a systematic, ongoing, integrated and research-based process
Institutional plans and budgets that demonstrate the linkage of assessment findings to planning at all
levels
Strategic institution-wide plans (or similar) that drive the mission
Minutes from appropriate units, committees or task forces charged with coordination of institutional
effectiveness and evidence of broad-based involvement of faculty, staff, students and other stakeholders in the
institutional effectiveness process
Documentation that relates to institutional effectiveness, such as budget preparation instructions,
minutes of budget presentation meetings, annual reports, annual assessment updates, institutional
effectiveness reports
Recent examples of how institution-wide planning/effectiveness have affected the institution

2.5 Compliance

____Compliant

_____Partially Compliant

_____Noncompliant

CREATING DOCUMENTATION

What We Planned

- Ask writers to provide evidence/ supporting documentation for the narrative they wrote
- Give detailed instructions on how to prepare evidence

LESSONS Learned From Reaffirmation

Suggested Resources

The items listed below are a partial list of documents that you may want to use in creating your SACS response. It is not a complete list – please use any resources that you think are best to support your narrative. Use the most recent version of all documents.

- Institutional documents such as:
 - Undergraduate and graduate catalogs
 - Institutional and programmatic academic policies such as admissions and completion requirements
 - · Policies related to employment, supervision, orientation and evaluation of part-time faculty
 - Bylaws and minutes of faculty and staff assemblies, senates or other representative bodies
 - Governance documents: charters, bylaws, minutes, reports, membership and policies
 - Files containing documentation of academic preparation, such as official transcripts, for all full-time and part-time faculty
 - · A completed faculty roster for a full-time and part-time faculty teaching coursework during the current academic term
 - Course syllabi
 - Minutes of institutional, divisional and departmental standing committee meetings
 - Formal agreements of all cooperative relationships among libraries
 - Student Services policies related to student governance, rights and responsibilities, residence halls, financial aid, student records, and health services
 - · Audits, board rosters, charters and bylaws of separately incorporated entities
 - Any reports from the athletics certification program of the NCAA (for Division I institutions)
 - Reports from other agencies and accrediting bodies
- Compliance certification report documents such as:
 - Survey instruments and results.
 - Minutes of the compliance certification committees.
 - Unit-level reports.
 - Compliance certification operational manuals and proposals.
- Institutional planning documents such as:
 - Policies and procedures related to implementation, review and evaluation of the curriculum
 - Library policies such as the development and evaluation of its mission statement, materials acquisitions and disposal policies
 - Policies for allocation of computer resources
 - Interim budget reports for all units
 - Maintenance and safety plans.
- Previous reports such as:
 - Copy of the previous institutional self-study
 - Visiting committee report from the previous institutional self-study
 - Institutional response to that report
 - Follow-up reports requested by the commission
- Special reports such as:
 - Copies of reports of any special committee or substantive change committees which have visited the institution
 - Responses to those reports
 - Follow-up reports requested by the commission

Providing Documentation for the SACS Reaffirmation Compliance Certification

A crucial component of the SACS reaffirmation narrative is providing appropriate documentation for the university's compliance status. It is not enough to state that JMU has a policy or practice in support of a requirement; the report must provide a link to that published policy.

When the compliance certification report is submitted, it will include an electronic document library of all documentation cited. This allows our off-campus reviewers to verify the information as they review. These links cannot be to live Web sites as the reviewers may not be able to access the Internet when they are reviewing. As a result, any links to Web sites must be reformatted as PDFs.

All documentation must be provided electronically through Xitracs.

In many cases, the source will be a Web site. For those documents, convert or print the page/site to a pdf and use the citation guidelines below. You can also include the full URL in your narrative for this draft.

If the source is not on a published Web site, you must provide an electronic copy of the document. A pdf file is preferred. These documents should be referenced in the narrative according to the citation guidelines below.

Capturing documentation for each compliance statement is essential. There are suggestions of sources to use in the Committee Resources section of Xitracs.

Examples

Because you are directly linking your sources through Xitracs, we can identify the document or portion of a document you think best supports your narrative. The reference will be shortened to increase the readability of the report.

The citation you submit may look like this:

Students on academic probation must submit their re-entry applications to the director of Academic Student Services [2010-11 Undergraduate Catalog, p. 28, Students on Academic Probation].

The mission of O&E is consistent with and integral to the university's mission and strategic planning:

Outreach & Engagement extends the resources of JMU's campus by encouraging the creation and implementation of innovative educational opportunities. We foster partnerships while encouraging and engaging individuals and communities to reach and exceed their personal and professional goals [Outreach and Engagement Web site Opening Page (jmu.edu/outreach)].

In the final version, the citation will look like this:

Students on academic probation must submit their re-entry applications to the director of Academic Student Services [Undergraduate Catalog].

The mission of O&E is consistent with and integral to the university's mission and strategic planning: Outreach & Engagement extends the resources of JMU's campus by encouraging the creation and implementation of innovative educational opportunities. We foster partnerships while encouraging and engaging individuals and communities to reach and exceed their personal and professional goals [Outreach].

Citation Guidelines

- For this version, do not follow a specific style guide for citing sources.
- Use brackets within text to document sources at the end of your sentence. If there are multiple citations in a sentence, group them in order at the end of the sentence.

The office will assist with local and statewide workforce and economic development and initiate relationships with business and industry to better understand how JMU can meet the workforce and economic development needs of our constituents [JMU Strategic Plan, 0&E Strategic Plans and Outcomes].

- If you are referencing a portion of a larger document such as one paragraph from a long Web page indicate the section with the appropriate heading or opening text.
- If you are referencing a portion of a larger print document such as the Honor Code section of the Judicial Handbook – indicate the section with the appropriate page number and heading.
- Include as much information as necessary to identify the source material. In some cases, this may be an entire document (i.e., a single Web page). In others, you need only cite the relevant page or pages (i.e., "Undergraduate Programs" in the current undergraduate catalog).

It is crucial that you provide all the information necessary to support the narrative you develop. If you need assistance in accessing a document or converting your document to an electronic file, contact Tina Grace (gracetm@jmu.edu) or Kristi Shackelford (shackekl@jmu.edu).

CREATING DOCUMENTATION

What Happened

- Created or re-created about 80% of evidence
- Reformatted most of the evidence more than half way through the process
- Allowed viewing, but didn't verify final documentation with SMEs

CREATING DOCUMENTATION

What We Learned

- Determine final format of evidence in advance
- Collect major documents for working team's reference (i.e., APR)
- Ask for specific documents as part of the outline provided to writers

Reviewer Template -Documentation

Required Documentation:
Description of the institutional effectiveness process
Documentation that shows that the process includes a systematic review that results in continuing
improvement and demonstrates the extent to which an institution accomplishes its goals.
Other Types of Documentation:
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Documentation that the institution has a systematic, ongoing, integrated and research-based process
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2.5 Compliance

___Compliant

__Partially Compliant

___Noncompliant

Managing Edits

What We Planned

- Working group would provide direct feedback to writers, who would make revisions
- We would conduct several rounds of edits
- We would edit in our content management system (CMS)

Managing Edits

What Happened

- Limited revisions by original writers majority re-written by working group
- Many more rounds of edits than planned
- Conducted external reviews late in the process
- Kept documents in Word for revisions

Managing Edits

What We Learned

- Develop a more realistic editing schedule that allows for multiple reviews of some standards
- Use Word for most drafts (not the CMS)
- Conduct external reviews earlier
- In reviews, group content by category rather than standard

Academics

2.7.1	3.4.7	3.6.1
2.7.2	3.4.8	3.6.2
2.7.3	3.4.9	3.6.3
2.7.4	3.4.10	3.6.4
3.4.1	3.4.11	4.2
3.4.2	3.4.12	4.3
3.4.3	3.5.1	4.4
3.4.4	3.5.2	4.9
3.4.5	3.5.3	
3.4.6	3.5.4	

Faculty

2.8	3.7.2	3.7.4
3.7.1	3.7.3	3.7.5

Facilities

2.11.2	3.11.2
3.11.1	3.11.3

Finance

3.10.1	3.10.3	4.7
3.10.2	3.10.4	

Governance

2.1	3.2.2.3	3.2.9
2.2	3.2.3	3.2.10
2.3	3.2.4	3.2.11
2.6	3.2.5	3.2.12
3.2.1	3.2.6	3.2.13
3.2.2.1	3.2.7	3.2.14
3.2.2.2	3.2.8	

Institutional Effectiveness

2.4	3.3.1.1	3.3.1.4
2.5	3.3.1.2	3.3.1.5
3.1.1	3.3.1.3	4.1

Libraries

2.9	3.8.2
3.8.1	3.8.3

Student Services

2.10	3.9.2	4.5
3.9.1	3.9.3	4.6

Other

- 3.12.1 Substantive Change
- 3.13.1 Accrediting Decisions of Other Agencies
- 3.13.2 Collaborative Academic Arrangements
- 3.13.3 Complaint Procedures
- 1.13.4a Reaffirmation of Accreditation Distance and Correspondence Education
- 3.14.1 Publication of Accreditation Status
- 4.8.1 Distance and Correspondence Education
- 4.8.2 Distance and Correspondence Education
- 4.8.3 Distance and Correspondence Education

PRODUCING THE REPORT

What We Planned

- Simple!
- One day for generation, assembly and mailing

PRODUCING THE REPORT

What Happened

- Not so simple
- Needed to establish and adhere to a final date for content and evidence

PRODUCING THE REPORT

What We Learned

- Allow more time than you think you need for final preparation. Double that time.
- Schedule an early review in the final format for timing and testing

Monitoring Between Reports

What We Planned

- Started two years in advance to conduct a pre-audit— plenty of time!
- Anticipated continuity and similar approaches to standards as in previous reports
- Expected to finish some sections early

Monitoring Between Reports

What Happened

- Spent a year conducting an internal audit to determine compliance
- Strengthened policies and procedures
- Needed to significantly revise sections written early

Monitoring Between Reports

What We Learned

- Develop a targeted list of priorities immediately after submission
- Establish a high-level, university wide maintenance group to keep SACSCOC on the university radar

Roster of SACSCOC Advisory Committee

(by position)

- Vice President for University Planning & Analysis, Chair
- Chair of the 2013 SACSCOC Steering Committee
- Vice Provost for Academic Programs
- Director of Center for Assessment and Research Studies
- Director of Outreach and Engagement
- Director of Academic Policy & Curriculum Development (served on SACSCOC Working Group)
- Policy Planning Analyst (served on SACSCOC Working Group)
- University Planning Coordinator (served on SACSCOC Working Group)

- Facilities Representative
- Finance Representative
- Governance Representative
- Libraries Representative
- Student Affairs Representative
- Dean
- Academic Unit Heads (two)
- Faculty representative involved in SACSCOC (reviewer)

CONTACT US!

Tina Grace, James Madison University, gracetm@jmu.edu Kristi Shackelford, James Madison University, shackekl@jmu.edu www.jmu.edu/sacscoc/downloads

Download a copy of our sample materials including: Sample timelines, editing materials, style guide, writing and editing guidelines and checklists, flowcharts for narrative review,