The No-Stress Self Study

Information Management, Step by Step
About Today’s Speakers

• **Marty Rosen**  
  Director of Library Services  
  Self-Study Co-Chair

• **Jenny Johnson Wolf**  
  Director of University Communications  
  Self-Study Steering Committee

• **Gabrielle Carr**  
  Library Coordinator of Public Services  
  Self-Study Resource Room Committee
About IU Southeast

• Indiana University
• Master's I
• 7,200 students
• 450 faculty and staff
• Limited on-campus housing
Give Us 45 Minutes...

1. Gathering Evidence
2. Drafting, Review and Revisions
3. Finalizing the Self-Study Document
4. Creating the Physical and Digital Resource Rooms
In the end...
Keep the Goal in Mind

1. A successful conclusion.
   - A complete, competent report
   - An awe-inspiring physical resource room
   - A user-friendly virtual resource room

2. Faculty and staff who don’t quit or lose their minds.

3. A visiting team that finds everything they need.
From the Reviewers

"The team consulted a large number of documents, materials, and web pages – the list of documents we reviewed goes on for three-and-half page. You did a wonderful job of facilitating the report and organizing the resource room. The team would like to extend its appreciation.... The organization of the resource room and easy access we had to documents and information in the electronic version of the self-study made it very easy for us to do our work."

From Dr. Leslie Crall, Team Chair, IU Southeast Comprehensive Evaluation Visit; Exit Interview, March 3, 2010
Now, back to the beginning.
Develop a Structure

Steering Committee

Accreditation Co-Chair

Chair

Working Group

Criterion 1

Chair

Working Group

Criterion 2

Chair

Working Group

Criterion 3

Chair

Working Group

Criterion 4

Chair

Working Group

Criterion 5

Accreditation Co-Chair
Set Policies

1. Working groups determine what evidence they will need.
2. All requests go through a single office.
3. Duplication of evidence is OK. (many working groups will need the same document)
4. All resources must be stored centrally.
## Gathering Evidence: The Grid

### Criteria

* The organization realistically prepares for a future shaped by multiple societal and economic trends.

### Sources of Evidence

#### Documents

- Strategic Plan
- EM Plan
- Diversity Plan
- Mission
- Core Values
- Vision
- School Strategic Plans
- Diversity Report (SB)
- Graduate EM Plan ??
- Reciprocity agreement

#### Interviews

- IR Director; Chancellor;
- VC Community Engagement;
- VC Administrative Affairs
- VC Academic Affairs
- Director of OIRA
- Chair(s) of Strategic Planning Committee;
- Sander's Chair (SOB)

#### Data

- IT Investments; Technology training plans and funding (listing of training for fac and staff); Number of IT equipped labs and classrooms; map of wireless coverage; Job Market Data and trends; growing majors; historic and current enrollment per major per year since last accreditation; demographic data for area; Local high school enrollment;

#### Other

- Statmats Research
- Research Used in Creation of the Strategic Plan
- Documentation of the Strategic Plan Creation Process; budget matrix for strat plan

---

*The organization's resource base supports its educational programs and its plans for maintaining and strengthening their quality in the future.*

### Additional Sources

#### Annual Budget

- Annual Report
- Strategic Plan Development Plan
- Strategic Plan Progress Document

#### Contract and Grant activity

- IU Southeast Foundation activity
- Staffing Allocations (FT and PT, by school and/or area); Faculty Allocations (FT and PT, by school and program); Listing of new position by date since last NCA accreditation

---

**INDIANA UNIVERSITY SOUTHEAST SELF-STUDY REPORT 2009**
Track Evidence

1. Who asked?
2. Who has it?
3. What’s it called?
4. Has it arrived?
Share Evidence

1. Use what you have! (Course management system, anyone?)
2. Redundancy is OK for evidence storage
3. Make it easy on your working groups

INDIANA UNIVERSITY SOUTHEAST SELF-STUDY REPORT 2009
Tips: What Worked

1. Centralize requests and storage
2. Evidence begets new information needs
Alert: What We Learned

1. Working groups don’t always follow instructions.

2. Many requests require interpretation, explanation, and translation.

3. Use consistent, intuitive file names from the beginning!
Drafting begins.
The Steps

While the working teams wrote the drafts, the resource group:

1. Developed a naming and tracking convention.
2. Reviewed all drafts.
3. Developed a desiderata list.
Highlighting Convention

- The resource room committee developed a color-coded method to track evidence citations in the working group drafts.
Tips: What Worked

1. Look for buried references in the text of the drafts.
2. Check for broken links. (web sites change)
3. Check and double check citations through the last draft.
Table 1-2
Representative Versus Actual Enrollment by Ethnicity

<table>
<thead>
<tr>
<th>Ethnicity</th>
<th>2007 Proportion of Indiana Service Area</th>
<th>Fall 2009 Proportion of Student Population</th>
</tr>
</thead>
<tbody>
<tr>
<td>African American</td>
<td>3.7%</td>
<td>6.1%</td>
</tr>
<tr>
<td>Hispanic</td>
<td>2.3%</td>
<td>1.7%</td>
</tr>
<tr>
<td>Native American/Alaska</td>
<td>0.3%</td>
<td>0.4%</td>
</tr>
<tr>
<td>Native</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Asian</td>
<td>0.6%</td>
<td>1.6%</td>
</tr>
</tbody>
</table>


Minority and female representation among faculty has increased as well. The proportion of women rose from 42.4 percent to 48 percent between 1999 and 2009, while the members of minorities increased from 9.9 percent to 14.9 percent. As Table 1-3 indicates, the sharpest increase in minority faculty occurred among Asians, while the percentage of African Americans remained stable and the percentage for Hispanics increased. The data indicate that the campus has made progress in diversifying its faculty in the face of continuing strong national competition for highly qualified faculty members from under-represented groups.

Table 1-3
Faculty Composition by Ethnicity and Gender

<table>
<thead>
<tr>
<th>Ethnic Group</th>
<th>1999-2000</th>
<th>2009-10</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Number</td>
<td>Percent</td>
</tr>
<tr>
<td>African American</td>
<td>6</td>
<td>3.9</td>
</tr>
<tr>
<td>Hispanic</td>
<td>1</td>
<td>0.7</td>
</tr>
<tr>
<td>Asian</td>
<td>8</td>
<td>5.3</td>
</tr>
<tr>
<td>American Indian</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>All Others</td>
<td>136</td>
<td>90.1</td>
</tr>
<tr>
<td>Total Faculty</td>
<td>151</td>
<td>42.4</td>
</tr>
<tr>
<td>Total Female</td>
<td>64</td>
<td>42.4</td>
</tr>
</tbody>
</table>

Source: 2009 Fact Book and Human Resources Data

The Last Draft
Alert: What We Learned

1. Don’t start with the first draft.
2. Vague descriptions of documents in the drafts will be a problem.
3. Consistency is key!
A written report.
The Steps

After the drafts have been completed by the working groups, the document is:

1. Edited for voice and copy errors.
2. Formatted into a final document. (PDF)
3. Linked to pieces of evidence.
Keep it Simple

- Table of Content
- Each chapter paginated independently
- Color coded
CRITERION ONE: MISSION AND INTEGRITY
Then by Core Components

- Each Component change is noted in the margin.
- Lots of “white” space with room for notes.
- Clear pagination.
- Obvious links to evidence.
Tips: What Worked

1. Use visual cues for your readers:
   – Color-coded sections & tabs
   – Icons for the different types of evidence

2. This takes a lot of time, and it will be a big document.
Alert: What We Learned

1. There will be errors in the copy. Proof. Proof. Proof.

2. Work with your resource room committee to ensure consistent naming of evidence (documents, web sites, reports)
Physical resource room.
1. Review the drafts
2. Track the items cited
3. Finalize a naming and organization structure
Tips: What Worked

- Color-coded system.
- Consistent titling.
- ALL documents retrieved during the two-year process were included in the physical resource room.
- Have a binder with a complete list of all documents.
<table>
<thead>
<tr>
<th>DOCUMENT</th>
<th>CRITERION</th>
<th>REFERENCED</th>
<th>SOURCE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Initial Commission on Higher Education</td>
<td>D</td>
<td>CAPR</td>
<td>A</td>
</tr>
<tr>
<td>Indiana Public School Enrollment</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Indiana’s Framework for Policy &amp; Planning Development in Higher Education</td>
<td>A</td>
<td>CAPR</td>
<td>A</td>
</tr>
<tr>
<td>Information Technology - Campus Computing Project</td>
<td>C</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Information Technology - Computer Services - Computer Labs &amp; Classrooms</td>
<td>B</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Information Technology - Computer Services Laboratory Data</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Information Technology - Computer Services Laboratory Data</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Information Technology - Computer Services Training Classes Statistics</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Information Technology - Computer Services Training Classes Statistics</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Information Technology - Media &amp; Web Services Report</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Information Technology - Mission Statement</td>
<td>D</td>
<td>CAPR</td>
<td>A</td>
</tr>
<tr>
<td>Information Technology - Mission Statements</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Information Technology - Mission Statements</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Information Technology - Mission Statements</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Initial Report of Diversity Assessment Plan</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Initial Report of Diversity Assessment Plan</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Initial Report of Diversity Assessment Plan</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Initial Report of Diversity Assessment Plan</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Initial Report of Diversity Assessment Plan</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Initial Report of Diversity Assessment Plan</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Initial Report of Diversity Assessment Plan</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Initial Report of Diversity Assessment Plan</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Initial Report of Diversity Assessment Plan</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Initial Report of Diversity Assessment Plan</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Initial Report of Diversity Assessment Plan</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Initial Report of Diversity Assessment Plan</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Initial Report of Diversity Assessment Plan</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Initial Report of Diversity Assessment Plan</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Initial Report of Diversity Assessment Plan</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Initial Report of Diversity Assessment Plan</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Initial Report of Diversity Assessment Plan</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Initial Report of Diversity Assessment Plan</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Initial Report of Diversity Assessment Plan</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Initial Report of Diversity Assessment Plan</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Initial Report of Diversity Assessment Plan</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Initial Report of Diversity Assessment Plan</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Initial Report of Diversity Assessment Plan</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Initial Report of Diversity Assessment Plan</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Initial Report of Diversity Assessment Plan</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Initial Report of Diversity Assessment Plan</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Initial Report of Diversity Assessment Plan</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Initial Report of Diversity Assessment Plan</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Initial Report of Diversity Assessment Plan</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Initial Report of Diversity Assessment Plan</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Initial Report of Diversity Assessment Plan</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Initial Report of Diversity Assessment Plan</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Initial Report of Diversity Assessment Plan</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Initial Report of Diversity Assessment Plan</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Initial Report of Diversity Assessment Plan</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Initial Report of Diversity Assessment Plan</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Initial Report of Diversity Assessment Plan</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Initial Report of Diversity Assessment Plan</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Initial Report of Diversity Assessment Plan</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Initial Report of Diversity Assessment Plan</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Initial Report of Diversity Assessment Plan</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Initial Report of Diversity Assessment Plan</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Initial Report of Diversity Assessment Plan</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Initial Report of Diversity Assessment Plan</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Initial Report of Diversity Assessment Plan</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Initial Report of Diversity Assessment Plan</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Initial Report of Diversity Assessment Plan</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Initial Report of Diversity Assessment Plan</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Initial Report of Diversity Assessment Plan</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Initial Report of Diversity Assessment Plan</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Initial Report of Diversity Assessment Plan</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Initial Report of Diversity Assessment Plan</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Initial Report of Diversity Assessment Plan</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Alert: What We Learned

1. Color code your color coding.
   (Ensure the physical resource room matches the document and digital resource room)
2. Documents arrive at the last possible minute
3. LOTS of paper and toner
4. This takes longer than you think.
Digital resource room.
Using Technology

1. Online resource room
   - Password protected
   - Available least six weeks prior to the visit
   - Easy to use links to evidence

2. Portable resource room
   1. On a thumbdrive
   2. Mailed with the document
SELF-STUDY REPORT FOR CONTINUED ACCREDITATION
SITE VISIT MARCH 2010

Online Self-Study and Resource Room Login

This website is password protected. The login information is included in your Self-Study information packet. Please input the following information:

Username: 
Password: 

Login For Your Site Visit Now

Login Assistance

Should you have difficulty accessing the electronic resource room, you can contact the IU Southeast Help Desk at (812) 941-2447.
SELF-STUDY REPORT FOR CONTINUED ACCREDITATION

SITE VISIT MARCH 2010

Criterion Two: Preparing for the Future

The Commission on Institutions of Higher Learning team that reviewed IU Southeast in 1999 observed that IU Southeast’s planning process had evolved significantly since 1989, but it added that the “process across the institution is not clearly integrated and systematic, ...or tied to a systematic assessment program.” In the decade since, IU Southeast has launched a comprehensive strategic planning process which is aligned with its mission and which guides unit-level planning and goal setting as well as the allocation of human and financial resources. During the same period, IU Southeast has strengthened the leadership, authority, and human, physical, and technological resources necessary to prepare students to meet professional, educational, state, and institutional standards established by units in their respective disciplines.

You may download Criterion Two of the Self-Study Report here:

Criterion Two
60.3MB - Zip Format
Online Self-Study Home

Welcome to the Online Self-Study and Resource Room. Please use the links on the left to browse the Self-Study Report. You may download the entire Self-Study Report below.

Self-Study Report Download

For Windows

Self-Study Report
91.2MB - SXF EXE Format
(Self-Extracting Zip)

For Mac

Self-Study Report
117.2MB - Zip Format
The Steps

2. During design, links are highlighted.
3. All pieces of evidence (webpages, documents, videos, etc.) are collected and stored centrally.
4. In the final stage, links are made live and all evidence is copied to the thumbdrives.
Tips: What Worked

1. The thumbdrive was a hit with the visiting team.
   – Easy to use
   – Portable
   – No internet or download delay

2. Link directly to the SECTION of a document you’re referencing.
Alert: What We Learned

1. The designers have NO idea what many of the documents are or why they are important.
2. This requires much back and forth between the designers, IT, and the resource committee.
Time and people
Who Was Involved?

Approximately 65 campus staff and faculty were directly involved in researching, organizing, storing, and sharing evidence, and in creating the print and online published self-study.

- Steering Committee
- Working Groups
- Marketing and Public Relations
- Information Technology Staff and Administration
- Library Staff and Faculty
How Big?

1. Final document: 261 pages
2. Final resource rooms: X documents
Tips: What Worked

1. Well begun is half-done. Save the peer reviewers’ time.
2. The job is not done until every question raised by peer reviewers has been answered to his/her satisfaction.
Alert: What We Learned

Snow days? Holidays? Missed deadlines?

Surely you jest!
Questions?

You can download the entire presentation at ius.edu/HLC_Public