



Reviewing **THE** **ACADEMIC** **LIBRARY**

A GUIDE TO SELF-STUDY
AND EXTERNAL REVIEW

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Successful External Reviews: Process and Practicalities

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INTRODUCTION

This chapter complements others in this book about library review (see chapter 4, “‘Trust but Verify’: Nonmandated Reviews in Academic Libraries”) and library self-study (see chapter 5, “The Library Self-Study Process”). It guides both academic library leaders and external reviewers through the process of planning for and conducting an external review of the community college, college, or university library. There is a paucity of information on this topic in the published library literature and recent major conference sessions; therefore, this chapter makes a unique contribution to practice.

McCaffrey’s online presentation covered program review for academic libraries generally, but did not focus on external review from a variety of points of view as we do here.¹ Others have discussed external review in academic programs generally speaking, in specific departments—communication, nursing, mortuary science, and continuing studies—and in external reviews of nonacademic programs such as faculty development centers.²

The information presented in this chapter comes largely from our own experience conducting and leading various types of external reviews in our consulting practice for Association of College and Research Libraries (ACRL). We refer to other sources when they provide a unique insight or bolster an assertion.

When conducting external reviews, we rely on the *Standards for Libraries in Higher Education* because they “reflect the core roles and contributions of libraries and were distilled from relevant higher education, accreditation, and professional documents.”³ The nine principles are intended to be expectations (standards) that apply to all types of academic libraries. They are as follows:

1. **Institutional Effectiveness:** Libraries define, develop, and measure outcomes that contribute to institutional effectiveness and apply findings for purposes of continuous improvement.
2. **Professional Values:** Libraries advance professional values of intellectual freedom, intellectual property rights and values, user privacy and confidentiality, collaboration, and user-centered service.
3. **Educational Role:** Libraries partner in the educational mission of the institution to develop and support information-literate learners who can discover, access, and use information effectively for academic success, research, and lifelong learning.
4. **Discovery:** Libraries enable users to discover information in all formats through effective use of technology and organization of knowledge.
5. **Collections:** Libraries provide access to collections sufficient in quality, depth, diversity, format, and currency to support the research and teaching missions of the institution.
6. **Space:** Libraries are the intellectual commons where users interact with ideas in both physical and virtual environments to expand learning and facilitate the creation of new knowledge.
7. **Management/Administration:** Libraries engage in continuous planning and assessment to inform resource allocation and to meet their mission effectively and efficiently.
8. **Personnel:** Libraries provide sufficient number and quality of personnel to ensure excellence and to function successfully in an environment of continuous change.
9. **External Relations:** Libraries engage the campus and broader community through multiple strategies in order to advocate, educate, and promote their value.⁴

Library directors, university administrators, and other campus stakeholders can have more confidence in the external reviewers' evaluation if nationally recognized standards are used as a framework for structuring the review.

This chapter addresses the following issues: purpose and scope of the review, working with the review team, preparing for the review, hosting the site visit, and using the final report to plan for the future.

PURPOSE OF THE EXTERNAL REVIEW

There are many different reasons for conducting an external review. It may be undertaken as part of the institution's cyclical review of all programs, as part of an institution's preparation for accreditation self-study and review processes, or at critical junctures in the life of a library (e.g., changes in library leadership, changes in institutional leadership, extreme budgetary or other environmental factors). Bers identified additional motivations for conducting academic program reviews: to enhance a unit's knowledge of itself in order to both sustain areas of strength and plan for improvement, to meet external demands for accountability, to neutralize interference by higher-level administration within the institution (or by boards of trustees and state governing boards), to gather fodder for public relations efforts that promote the program to prospective students and others, and to provide legitimacy by pushing the agenda of individuals with authority.⁵

The external review may be informal, with few requirements placed on reviewers, or more formal with structure and specific deliverables.⁶ For academic libraries undertaking an internal self-study outside of any specific institutional impetus, "the opportunity to obtain additional benefit from the work already completed can make the external review a wise investment."⁷

External reviewers are generally regarded as impartial, objective outside experts. Pitter recommended the use of external experts "particularly at institutions where faculty may not have the opportunity to be engaged in their discipline at the national level; therefore lack perspective necessary to stay abreast of developments in the field."⁸

Because they lack the potential biases and political motivations of internal reviewers, their findings are perceived as having a higher degree of

validity and fairness. From the perspective of stakeholders within the library, having recommendations come from an external reviewer carries weight “because it is a respected member of their discipline, nominated by them, making the recommendations, rather than a university administrator. Administrators in turn, may place more credence in the recommendations of an outside evaluator than those of departmental faculty.”⁹

Reinhard detailed the strengths and weakness of using external evaluators. External teams bring a fresh perspective, seeing and noticing things that internal stakeholders do not. They raise new questions, “come up with novel ways of explaining things, or show things in a new light, break new ground with solution and act as a catalyst for change.”¹⁰ While external evaluators may increase the objectivity of the data collection, they may also have difficulty establishing trust with program stakeholders or fail to grasp the central issues. They may ask questions that are off the mark or report on things that are already known or not central. They may explain things in ways that make stakeholders “feel misunderstood, under-represented, or wronged.”¹¹

We believe that the positive aspects of bringing in an external perspective far outweigh the potential negative aspects. Furthermore, when hosts invest time in good preparation, communication, advance documents, and a clear charge with explicitly stated expectations, the possibility of truly helpful outcomes is all but assured.

Program review, with an external perspective, can help leaders outside the library but within the institution understand “what needs to be enriched, revised, improved, maintained, downsized, and even eliminated.”¹² The use of a program review for these latter purposes can be disconcerting—and even frightening—to those within an academic unit. We urge library leaders, then, to understand that “honest reviews can have negative consequences for those within the unit, especially if the unit’s performance is gauged to be inadequate or the expense of sustaining the unit is judged to outweigh the value of having it.”¹³

The reasons for conducting an external review and the scope will affect the preparation and management that we will address later on in this chapter. Dutton, Burgess, and Nesbit posed valuable questions:

Is the review meant to recommend large-scale changes that might question the very existence of the program area? Should the review compare the program area to similar programs at other institutions? What geographic range should be considered? Should opportunities for future growth be recommended, or is it more a matter of program retrenching?¹⁴

Additionally, you may be seeking “reinforcement by credible outside experts of opinions and advocacy that have not received proper attention.”¹⁵ In any case, sharing “specific pre-determined goals for a review with reviewers is not advisable due to its tendency to bias the review process.”¹⁶

Regardless of the purpose of the review, there should be very clear communication both internally and externally regarding goals, scope, processes, timelines, and target dates.

Not all external reviews need to include an on-site visit, although that is a common arrangement and much of our chapter will address the effective use of on-site time. When a review is sought primarily to help move along new programs that are already in place, reviewers could work remotely using self-study reports and supporting documents as the basis for their analysis and report.¹⁷

Benchmarking is a useful approach for compiling outside data or information. *Standards for Libraries in Higher Education* includes an excellent appendix on key ratios for peer comparison.¹⁸ (For more on benchmarking see this volume, chapter 2, “Thinking beyond the Library: Contributing to Institutional Value through Accreditation,” and chapter 5, “The Library Self-Study Process.”) Benchmarking can also be useful for institutions seeking an external perspective, without an external review at all.

In this section, we’ve highlighted approaches to an external review—formal, informal, site visit, or documentation only. We’ve also suggested that benchmarking exercises can also be used to provide an external perspective. Regardless of the kind of external review undertaken, research shows that external reviews are “rarely entered into in a completely open-minded way by the owners of the program under review”; therefore, stakeholders should be brought together to “reach consensus on the goals.”¹⁹

Clarity regarding scope and purpose are best agreed to jointly with other campus stakeholders, as we discuss next.

Enlisting Support from Senior Administrators

Some reviews are initiatives by the institution's academic leaders such as the provost. However, if the review is being generated from the library, library leaders should make certain that the process is supported by institutional leaders. Once it has been determined that an external review will be useful or that the library should undergo program review, library leaders should seek agreement on scope and purpose through dialogue with the senior administrators on campus, such as the provost or other high-level academic officers. It is crucial to secure their support because they will be involved in hosting and meeting with reviewers, providing information to the reviewers, and signaling to others on campus that their cooperation will be needed. Senior administrators will also be an important audience for the final report.

Bringing external reviewers to campus is a significant investment. To ensure that this is time and money well spent, all stakeholders need to understand the purpose and scope. If the review is being initiated by the library, prepare answers to these questions before meeting with your senior academic administrators to propose an external review:

- Why are you considering an external review?
- What issues are you hoping to address?
- What insights are you seeking?
- What elements of your program need to be reviewed?

By forming your own opinions about each of these questions and uncovering your assumptions, you will be able to have a more productive conversation with your chief academic officer. As additional preparation, prior to meeting with your chief academic officer, ascertain the level of institutional support that is typically available and determine if there are any standard expectations for all programs undergoing review (if the review is part of cyclical institutional program reviews). Ask others at your institution who have recently conducted external program reviews to share how

they managed the process and if there is guidance at the institutional level. Simon Fraser University, for example, has developed an overarching framework with general guidelines for establishing program reviews. It includes a set of guiding questions that can be modified by the dean or program office as appropriate.²⁰

Developing a Clear Charge

A successful external review is a learning experience and an extended conversation between the program and the review team.²¹ It is crucial that you be explicit about your expectations and hopes for the external review process. Having clear goals will “guide the evaluation process and ensure it stays on track, producing useful data.”²² Establishing a clear purpose and bounded scope is essential. It will help institutional stakeholders understand the process and bring focus to the work of the review team.

The group conducting the external review should have a clear charge that articulates explicit goals and areas of focus. Which programs, services, or structures are most important? Is the entire set of library operations and programs going to be addressed? The charge should indicate time span and use language that reflects priorities of your institution, whether on student learning and success, research productivity, or other areas.

Developing a charge will require negotiation with others on campus. Consider who needs to be involved and how you will build their engagement. As you develop the charge, you will need to check in again with senior administrators to be sure they remain in agreement with the direction you are giving to the group. If the review is part of a cyclical institutional review process, language regarding scope may be available for you to modify as needed. See appendix 7.1 for an example of a charge.

A successful review depends greatly on your clarity of purpose and how lucidly you communicate that scope to reviewers in advance, through the charge and other means. In Burns’s experience, the reviewers’ findings and recommendations were not surprising:

For the most part, the reviewers told us what we told them. They also told us what the administration told them. In a way the external reviewers are mediators between the department and university. They

mostly confirm and provide helpful external validation for what the department and university have already been saying to one another. It is therefore important for the department to agree in advance, if possible, about the points to be stressed to the reviewers.²³

Be clear that you are seeking a final report that uses the reviewers' interpretive lens and expert judgment about quality and impact, not a descriptive report. As Sides stated, "the purpose of a review is to provide analyses along with clear suggestions of how to translate those analyses into program administration and structure."²⁴

THE REVIEW TEAM

Appointing the Review Team

The type of review will affect how the review team is appointed. When a cyclical program review is taking place, the chief academic officer or office responsible for cyclical program reviews will typically ask the library director for a list of recommended external experts. These are usually, but not always, librarians from other institutions. The library director is being trusted to recommend people who can be relatively objective in looking at the library. Usually, a small review team is composed of two to three people, though some teams are larger depending on the number of libraries on campus and the extent of the review. If the external review is in preparation for accreditation, the library director may be asked to identify appropriate individuals to be reviewers and may even be asked to form the review team without much vetting from other campus offices or individuals. Finally, if the review is being conducted at a critical juncture, the library director or interim director will put together a review team that will be vetted by the chief academic officer.

Some universities use one external reviewer,²⁵ while others use a minimum of two and as many as four.²⁶ In our experience with external library reviews, some teams include one or two disciplinary faculty members and one or two graduate and undergraduate students from the institution in addition to the external library experts identified. Including others from the institution provides external reviewers with context: these others will understand what is simmering on campus, and they can help find language

so that the recommendations will be heard.²⁷ Regardless of team composition, it is important to develop a clear charge for the review team (again, see appendix 7.1 for an example) and for the chair to provide an orientation to the nonlibrarian members of the team.

The Important Role of Review Team Chair

While the composition of the review team may incorporate a variety of roles and stakeholders, the chair of the review team should have a deep knowledge and understanding of the academic or research library world appropriate to the specific institution. The chair is typically an external reviewer but less commonly could be internal to the library, and each approach has strengths and limitations. Regardless, this person has power in influencing the review process by how she or he selects the reviewers, plans the site visit itinerary, provides advance information to the reviewers, and stresses certain points during conversations. Even at institutions that have standard guidelines for external review, “the format may be malleable to a surprising extent, and the chair should be as thoughtful and intentional as possible in shaping the process to the benefit of the department.”²⁸

Wawrzynski and Davidhizar offered extensive advice on how to serve effectively as the chair of an external review team, addressing standard leadership skills (communication, motivation, and direction setting) as well as “e-leadership” (communicating via e-mail with “sensitivity to how messages are worded and responded to”).²⁹ Tact and sensitivity are essential when there is an absence of nonverbal cues. “An expert chairperson compensates for this through special care in wording of responses as well as the timeliness of his/her responses to the team.”³⁰ These considerations extend to conference calls, which are frequently employed to plan the site visit and to discuss team member observations.

Identifying Reviewers and Negotiating Expectations

As described above under “Appointing the Review Team,” choosing the appropriate size and composition of the team is important—and size and composition can vary widely from institution to institution. To find librarians from other institutions who could serve as external reviewers, it is useful

to look at both peer institutions and also aspirational peers. When looking within the library profession, consider the following questions. Who have you heard present or whose writing have you read that you admired? Who seems to “get” where academic libraries are going and understands the changing higher education landscape? Appropriate nonlibrarians might also be appointed as noted above; you might appoint one or two more stakeholders such as faculty members or students.

With respect to compensation, some institutions offer no honoraria and reciprocate with each other by trading external reviewers, while others offer only a few hundred dollars as a standard token.³¹ Other more experienced reviewers will have established their own minimum rate of up to \$3,000 per person plus travel expenses.³²

ACRL offers consulting services,³³ including external reviews that include a review of background materials by two consultants who also conduct a one-day site visit (or longer if desired), provide benchmarking against peers on key data points, analyze findings, and deliver a report of about twenty pages that focuses on areas of strength, areas for growth and improvement, and specific recommendations using *Standards for Libraries in Higher Education* as a framework. A project with this scope and number of reviewers would cost approximately \$9,500.³³

PREPARING FOR THE REVIEW

Self-Study and Ancillary Materials

Once the purpose of an external review is conveyed to library staff and to relevant constituents, the library typically prepares a self-study that, for most reviews, is an analysis (not a description) of the library’s programs and services (see also chapter 5, “The Library Self-Study Process,” in this volume). The self-study usually includes data gathered via surveys, focus groups, and any other data sources. The self-study is a critical instrument for the review team in understanding the library and its own assessment of strengths, areas for improvement, goals, and impediments to achieving those goals.

The self-study is ideally developed using a participatory process, with librarians and staff contributing content, data, and its analysis. This report

should be concise but thorough, covering all programmatic areas, including services, collections, administration, facilities, partnerships, and so on.

In addition to the self-study, the review team may request many other materials and relevant documents including the following:

- library's operating budget
- lists of peer institutions and aspirational peers
- strategic plans (of the library and of the university)
- position descriptions
- departmental annual reports
- instruction assessments
- collection development policies

The review team will review the library's Web presence, discovery platforms, social media channels, and the like. Even though many documents have been made available to the review team, once they are conducting the review on site, the review team may request additional documents.

Preparing Staff for External Review

If the external review is to be effective, it is very important to spend time preparing the staff for the review process. They should understand as much as possible about the purpose, preparations, and use of the results. Such knowledge will enable the staff to comfortably engage with the external review committee and lead to recommendations and observations that staff members can take to heart and act upon.

Since external reviews are not common occurrences, staff may not realize the positive purpose of such processes. Indeed, some staff may be nervous about outsiders looking closely at their work and at the library in general. Take the time to describe how the external review fits into other activities within the library such as gathering user input and strategic planning. Explain the full extent and positive nature of the process while being clear that the final recommendations may call for change. Be sure to cover the following:

- *The site visit.* Prepare staff for engagement with the external review team during the site visit.

- *The external review report.* Prepare staff for understanding the ways in which you intend to make use of the external review report.
- *The connection between review and the future.* Explain the future direction of the library and how the report plays a role in this. (See the sections “The Site Visit” and “Using Report Results for Future Planning” later in this chapter.)

While it is important to tap the thinking of all staff members in preparing for the external review team’s site visit, it is particularly important to engage the professional staff in preparing for conversations with reviewers. They should think carefully about how to best frame issues from the self-study and not let their own personal hobbyhorses take center stage. Professional staff should develop a cohesive and strategic approach to their part in the external review in order to yield more powerful recommendations from the reviewers.

THE SITE VISIT

One of the most important parts of an external review is the site visit. This visit is a one- to three-day event during which the review team has the opportunity to explore and investigate the library through individual and group interviews, formal focus groups, tours, in-depth meetings with specially identified staff members, and so on. In order to maximize the productivity of the time the reviewers will be on campus and in the library, it is absolutely essential that their time be planned well in advance.

Communication by the library director to the reviewers—and, in particular, with the chair of the review team—is crucial to a successful site visit. Wawrzynski and Davidhizar emphasized the importance of “setting a collegial tone, establishing e-mail communication, obtaining information on areas of expertise, discussing travel plans, dividing responsibilities for the standards in the site visit report, and soliciting input into the agenda.”³⁴ Much of this responsibility for setting the tone and putting members at ease—by being both professional and collegial—lies with the chair. “Setting the tone begins with the first contact. In spite of the availability of e-mail a personal phone call is more likely to set a positive tone and should be used for the first contact.”³⁵

The agenda should be developed by the external reviewers led by the chair of the review team. The chair of the review team should be in touch with the library director on an ongoing basis to share iterations of the agenda for planning reasons and to solicit input regarding meetings with appropriate individuals or groups. Review teams will have very specific ideas about individuals and groups they may want to interview as well as locations in the library and on campus that they may want to spend time visiting. On larger campuses with multiple libraries, time must be allotted for visits to branch or disciplinary libraries. It is very important to begin planning the schedule for the on-site visit early on to accommodate interviews with staff, faculty, students, and other departmental staff (such as IT, writing centers, and centers for teaching and learning).

As mentioned earlier, the review committee chair's role becomes more important during the site visit to frame, set the tone, and introduce the review team and the process to participating individuals or groups.

Schedules should allow time for the review team members to travel from one place to another and take short breaks. Most importantly, the schedule should include a considerable block of uninterrupted time at the end of each day for the review team to collect and share thoughts with one another. This time to reflect and capture initial thinking is critical for preparing an accurate report.

After the review team has had this chance to discuss observations, it is appropriate to ask the team (or the chair) to spend twenty minutes sharing first impressions with the library director, and on occasion with the senior academic officer, before leaving campus. Some institutions conclude the site visit by scheduling an hour or two for the team to plan next steps and identify a process for writing the final report.

Developing a Site Visit Guide

Some chairs may wish to develop a site visit guide that orients the team and provides guidance for meetings with specific individuals and groups. This type of orienting document may be particularly important and useful to the members of the external review team who have either never served on an external review or have no knowledge of the library world.

The site visit guide can provide team members with opening comments for each interview with groups or individuals. This can help with messaging consistency regarding the purpose of the review and the ways in which it is being conducted and even could extend to how the results will be disseminated. The guide can also include the questions and probes that the review team develops. Another option is to provide the review team with a shell guide that can be fleshed out with the questions on site. (See appendix 7.2 for examples of a site visit guide and an annotated reviewer's agenda).

While some hosts may wish to provide examples of the general guiding questions that would be appropriate for one group or another, we advise against scripting specific questions for reviewers to use in their interviews and focus groups. Instead, explain to reviewers that they should use open-ended interviews with a conversational mode. Because your reviewers have expertise and deep knowledge of the subject, you should have confidence in them and grant them autonomy to exercise their professional judgment.

A seasoned site visitor chairperson will have a personal repertoire of questions for individuals and groups who are routinely on a site visit agenda so that collecting the necessary data to address the criteria and standards can be done efficiently. Thus the chairperson's generic list of questions can be tailored to the questions generated by the program's self-study to meet the needs of the site visitors' report which is being drafted.³⁶

As stated earlier in this chapter, having someone from your institution on your team will help the external reviewers as they develop the site visit guide, during the visit, and while preparing the report. This internal person can assist in finding appropriate language to use in questions and the report, demystifying jargon, and translating any institution-specific contextual remarks.

Logistics

Selecting and Inviting Participants

It is the responsibility of the library to issue invitations to campus constituents to attend focus groups or individual interviews. The text of the

invitation should be developed by the library director with the chair of the review team to ensure that the intention of the particular meeting is being expressed correctly. The library director should also communicate the intention of the review to all staff and include information about what staff will be involved and what their responsibilities will be. To ensure the time of the review team is well spent, consider having groups come to a central location rather than asking reviewers to move from building to building. In the case of libraries on multiple campuses or branch libraries, going to each site will be essential. However, for general interviews and focus groups, it will be a better use of time to arrange for on-campus individuals and groups to come to the reviewers. You, as host, should designate an escort for reviewers who need to change locations (more than down the hall or up a floor). This person can both ensure reviewers reach their destination and set the stage for the next meeting.

With a packed schedule, it will be important to prepare reviewers and remind them of whom they will visit next and why; this is particularly important if the review team is not using a site visit guide of their own. Give reviewers as much insight into the perspective of senior administrators with whom they will meet and likely questions those individuals might ask of reviewers. Try to uncover and make clear any agendas, whether spoken or hidden, so that the reviewers aren't unnecessarily surprised. Provide table tents or name badges for any faculty, students, or staff. Include photos and a sentence or two for key people (i.e., senior academic administrators) on the schedule.

Group interviews with disciplinary faculty, undergraduates, and graduate students are usually part of the site visit. Other commonly included people and groups include the dean of students and the leaders of IT, the writing center, and the teaching and learning center. The library should invite more people than necessary to allow for the problem of no-shows. External review committees prefer to interview undergraduate students who do not work in the library. Library student workers are seen to have an inside edge and understanding that the non-library worker does not. Try to secure a broad representation of the student body.

Disciplinary faculty may be divided into separate groups, such as social sciences and humanities, sciences, professional schools, and so on. The

library director and professional librarians should use their considerable campus networks to generate faculty interest in attending the external review meetings. To identify nonparticipants, that is, people who do not use the library, in a way that is not insulting, consider approaching early career faculty who are new to the institution. You may have to go through several lists to find enough people to make a focus group.

It is crucial to designate someone to track the RSVPs, send reminders to participants, and create rosters for the review team so that the group interviews or focus groups are successful.

Consider the political undertones in the decisions you make about who is interviewed and how, particularly within the library. Are supervisors and rank staff in the room together? Are librarians interviewed with other library staff or separately? As a group or independently? Is there a librarians' council or other professional group outside of the administrative chart?

Meeting Space and Setup

A room set aside exclusively for the use of the review team is useful for a number of reasons: interviews may be held there, review team members can hold their own debriefing meetings there, and the space can also accommodate all the documentation and review materials that the library wishes to make available to the team. Copies of documents previously shared with the review team should be on hand in case a review team member is missing a document.

It is customary to provide refreshments—coffee, tea, and snacks—for both the review team members and for the interviewees throughout every day the team is on site. There are many ways to handle lunch. Having a student focus group over the lunch hour and offering pizza can be a draw for participants. If reviewers are working with participants over lunch, ensure they have substantial breaks to process what they have heard before they head to the next meeting.

Some libraries provide time for the review team to meet alone over a catered lunch; others make reservations at a campus restaurant for the review team to get away for lunch for just this purpose. These choices are very much up to the library and the chair of the review team. The library should be highly sensitive to the constrained time frame within which the

review team is working. Keeping interviews, breaks, visits, and tours on schedule helps the reviewers make the most from time on campus.

In some cases—depending on the number of days allotted to the site visit—the external review team may need to run concurrent meetings. Make certain that the space is available to hold two concurrent focus groups or interviews. When such concurrent sessions are being held, appoint someone to make certain all necessary supplies, refreshments, seating, and so on are in place in each of the rooms.

Not all of this work should fall on the library director or senior library administrators. Including newer, less experienced librarians builds their capacity as they help plan for the review process and the site visit. This service provides professional development and an opportunity to cultivate leadership in others, as team members handle new challenges in managing a site visit and preparing an external visitor.³⁷

THE EXTERNAL REVIEWERS' REPORT

The reviewers' report can serve different functions, depending on who is calling for the review and why. At the outset of the external review process, work with senior campus administrators to clarify desired dissemination of the report as this will ensure a smoother process once you have the report in hand. Be forthright early on with all stakeholders about whether you will share the report broadly or keep it in confidence with the review chair and senior library and academic administrators.

What do your various audiences need in a report? Some campuses negotiate with reviewers to write one short report that can be public and another, more comprehensive report that will be kept internal. Know what your audiences expect and to what they will respond best.

While you should not have to request it, remind the review team chair that you expect an executive summary, as senior academic officers will want a clear, succinct overview. For the same reason, ask for concise bulleted recommendations at the end of the report. Provide your review team with direction on the minimum elements required. Pitter included a useful template for a report format.³⁸

When you have identified your reviewers and are coming to an agreement with them, everyone involved should have a clear understanding

regarding the due date for delivery for the report (typically three to four weeks after the visit). Let the reviewers know you may be sending back edited copy to correct factual errors, request clarifications, and ask for more detailed explications of key recommendations. It is not reasonable to ask for complete rewrites or request that specific observations be expunged. Requested changes should relate only to factual errors and clarifications. You should request the changes by a firm deadline.

In a systematic assessment of program reviews, Harlan judged external reports by using the following criteria for standards of quality:

- Use of evidence
 - Relies extensively on the data provided in the self-study and during the site visit, and
 - Interprets it accurately to justify recommendations.
- Alignment with self-study
 - Directly responds to the program’s self-study, including goal achievement, curriculum, student experience, and resources.
- Relevance for program
 - Addresses all of the major issues raised in the self-study, as well as relevant issues in the professional and/or academic practice of the discipline
- Realistic and actionable
 - Makes appropriate recommendations for the college, and provides reasonable suggestions for moving them forward³⁹

Ask reviewers to make recommendations that suggest levels of change so the library may choose which pieces to implement, in phases, as time and budget allow.⁴⁰

Communicating the External Review Recommendations to Staff

The external review report should be seen—and used—as a springboard for rich communication and work within the library (and perhaps even between the library and important partners on campus). While some institutions may choose to keep the review report confidential within a small leadership

team, we firmly believe that the external review report should be made freely available to all members of the staff and that a meeting should be held with all staff to go over the report's recommendations in general. Smaller meetings with appropriate groups should be held to have discussions regarding the recommendations in specific terms and to plan next steps.

The report may contain some comments or recommendations that may seem (or actually be) sensitive in nature. It is a judgment call how to handle these. We believe in dealing directly with suggestions or comments that may seem challenging, but each library director must decide how to handle these issues for his or her own organization.

In spite of this confidence in the external opinions, once the report is delivered, the library director may still need to remind staff—and even administrators—of the purpose of the review as a context for the report. There may be push-back on the part of some staff. The report may suggest difficult or unexpected changes. The library director must manage the discussion of the report and recommendations in an immediate and coherent manner. At all times during the reading and discussion of the report, the staff should be reminded of the helpful and positive nature of these external points of view. When communicating the report, it is useful to remind all staff of the purpose and scope of the review and to frame the report in the context of developing plans for the future. A director might even develop a framing document to introduce the review team's report to the library staff. The director should remind staff that the report contains recommendations, not a mandate. While some recommendations may be acted upon, others may not; it is up to the library and institution to make those decisions.

Helping others to view the report as something that will inform the strategic decisions and choices the library makes in the future is a positive approach to the feedback and observations of the review team. This kind of work on the part of leadership can also allay defensive responses to the report. Staff may be tempted to explain away or rationalize why things are the way they are. While these responses may still be voiced, if the discourse focuses on how to use the feedback and commentary in a positive way, these defensive reactions will be less of a focus for the whole organization.

In some cases, the recommendations will reflect the desires of the library leadership and staff and support specific ideas and actions. In these fortuitous

cases, it is very important to begin acting upon the recommendations as soon as possible using the momentum of the review process as a source of energy and impetus.

Using Report Results for Future Planning

While chapter 5 of this book considers the institutional response to external reviews, we want to briefly contribute our thinking about how the library itself can use report results for future planning. But first a few words of caution. “A typical problem is that momentum often dissipates after the site visit, and by the time the external report arrives, it receives little attention. The process comes to a halt, and faculty are left wondering why they spent so much energy for so little return.”⁴¹ Because stakeholders often move on once the review team has left, reviews tend to have poor follow-through and reports languish. Pitter advised:

It takes considerable commitment, time and energy to ensure that a document such as a memorandum of understanding or action plan is developed and monitored after a specified interval of time. The document should include specific deadlines for addressing recommendations emanating from the review and individuals with primary responsibility for the action. Both faculty and administrators should come to agreement on the specifics delineated in the document.⁴²

Plan in advance for a follow-up phase so that all the effort of the self-study and external review does, in fact, become a catalyst for change. In an extensive review of literature about academic program review, Mets found that program review results are maximized when follow-up is included. The critical factors she identified for successful use of program review results are strong leadership; effective communication; integration of program review with budget, planning, and assessment processes; and building efficiency into future cycles.⁴³

CONCLUSION

Effective external reviews rely on clear communication with senior administrators on campus, clear understanding and continuous communication with the review team and the review team chair in particular, crisp planning

for the site visit, and a strategy for receiving and interpreting the external reviewers' report. Central to all those elements is effectiveness of communication. The library director must make certain that the review team and the library staff understand their roles and opportunities for engagement in the process. Likewise, clear and forthright communication from the onset with stakeholders within the library is crucial to how the report and recommendations are received and acted upon.

Taking charge of the external review process and appointing point people to manage the details and logistics (like the site visit and recruiting participants) will lead to a much more efficient and clear process. How you manage the process will speak volumes to the external review committee. The review committee's impression of the library begins with the first contact and continues with every contact, communication, and interaction thereafter. Aside from presenting the library in the best possible light, the library director should ensure that, right from the outset, there are no impediments to the work of the external review team. Participating in the facilitation of an external review can be a valuable professional development and leadership experience for librarians who are newer to the profession.

Perhaps the most important thing to remember is to use the opportunity of an external review to enhance the library's capacity to meet its mission.

NOTES

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 4. *Ibid.*, 9–14.
 5. Bers, "Program Review and Institutional Effectiveness," 64–66.
 6. Sides, "First-Person Perspective," 440.
 7. Burns, "Preparing for a Program Review," 12.
 8. Pitter, "Program Review," 3.
 9. *Ibid.*, 4.
 10. Reinhard, "Mortuary Science Programs," 33.
 11. *Ibid.*
 12. Bers, "Program Review and Institutional Effectiveness," 64.
 13. *Ibid.*
 14. Dutton, Burgess, and Nesbit, "Looking Forward by Looking Back," 9.
 15. Burns, "Preparing for a Program Review," 15.
 16. Sides, "First-Person Perspective," 444.
 17. Beach, Dezure, and Kalish, "External Program Reviews and Reviewers."
 18. ACRL, *Standards for Libraries in Higher Education*, 22–25.
 19. Sides, "First-Person Perspective," 444.
 20. Dutton, Burgess, and Nesbit, "Looking Forward by Looking Back," 4.
 21. Beach, Dezure, and Kalish, "External Program Reviews and Reviewers."

22. Dutton, Burgess, and Nesbit, "Looking Forward by Looking Back," 9.
23. Burns, "Preparing for a Program Review," 13, 15.
24. Sides, "First-Person Perspective," 444.
25. Dutton, Burgess, and Nesbit, "Looking Forward by Looking Back," 4.
26. Burns, "Preparing for a Program Review," 13.
27. Beach, Dezure, and Kalish, "External Program Reviews and Reviewers."
28. Burns, "Preparing for a Program Review," 15.
29. Wawrzynski and Davidhizar, "The Expert Site Visitor Chairperson," 123.
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32. Beach, Dezure, and Kalish, "External Program Reviews and Reviewers."
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35. Ibid.
36. Ibid., 125.
37. Ibid., 123.
38. Pitter, "Program Review," 8.
39. Harlan, "Meta-review," 747.
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41. Harlan, "Meta-review," 752.
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APPENDIX 7.1

Sample Charge for the External Review Committee

Western Michigan University, Office of Faculty Development

As part of the strategic plan laid out in 2008, an external review of the Office was planned for Spring 2011, to add to the assessment of the impact and effectiveness of the faculty development programming and to help the OFD plan for future growth.

Given that context, the goals of the review include to determine:

- Appropriateness and effectiveness of the mission of the OFD.
- Effectiveness of the organization in meeting its current mission.
- Effectiveness of the programming and identification of areas for future focus.
- Staffing and support levels in comparison to WMU's Carnegie peers.
- Work necessary to move the faculty of WMU to the cutting edge of teaching and learning, in line with the current national conversation about meeting student learning needs.*

* Andrea Beach, Deborah Dezure, and Alan Kalish, "External Program Reviews and Reviewers: A Comprehensive Planning Workshop" (presentation, Professional and Organizational Development Network in Higher Education Annual Conference, Pittsburgh, PA, November 7, 2013).

APPENDIX 7.2

Site Visit Guide Examples

Example One

NOTE: In this example, the guide was generated by the external review team chair for the purposes of helping the team members. The chair provided these questions and probes as a beginning, and team members refined them and added on to these.

External Periodic Review of the Library

University of xxx, [city, state]

Site Visit Guide

Introduction

At the beginning of each session, we need to introduce ourselves, have participants introduce themselves, and then provide a brief description of why we are there, the intention of the conversation, etc. It should be short and sweet! This can be something along these lines:

This session is part of the university's periodic review process. This process builds on campus unit annual assessments. The purpose of the periodic review is to provide the unit in question with data, observations, and recommendations from an external review team. This information is meant to build on identified strengths and to address areas for improvement. It is not a punitive process, but rather it is a helping process.

We are members of the external review committee, and we are interviewing different groups served by the library or collaborating with the library to get a complete picture of the library's strengths and areas for growth and development.

This conversation is completely confidential. We will use data gathered from these interviews to write a report for the provost and dean of libraries. That report will also include our direct observations of the strengths and growth areas of the library. However, we will not be using any personal names or making specific attributions to individuals in the content of the report.

Questions for Specific Groups

NOTE: The questions below are meant to get us started thinking. Feel free to suggest other questions. Having one or two questions and a few probes is often all that is needed to get started, but we should have some extra questions at the ready in case the conversation runs dry. Note that I suggest a few probes under a few of the questions below—feel free to add other probes and certainly other questions!

Tuesday, <Date>

9:00–9:30 <Name>, Provost

This conversation will likely be more of an introduction of us to Dr. X and also an opportunity for us to get a sense of his thinking about the library as well as the value of the periodic review process. We know that Dr. X has been in this role since <Date>.

9:30–10:15 <Name>, Dean of Libraries

This is an opportunity to hear from the library dean what he'd like to have the library accomplish. We can ask specific questions of him such as (but not limited to!):

- What specific strengths do you perceive the library to have?
- How do the strengths match up to the strategic goals you have set out in the *strategic plan*?
- What do you feel needs to happen in order for you to accomplish your strategic goals?
- What are significant issues in the field of libraries in higher education? [We may not have time for this!]
- Any other questions you all are interested in asking the dean of libraries?

10:15–10:30 Break for Team

10:30–11:30 Library Staff

This group is paraprofessional (so all the staff without *librarian* in their title). Some of these people do very repetitive tasks, while others some may do work that some would consider close to professional work (such as responding to reference inquiries via chat). We may encounter a wide range

of experience with where the library is going—or it may be quite limited. There is no way to tell, and we must be prepared to follow answers that look like they might reveal important information.

- From your perspective, how well is the library functioning?
- What do you think are the strengths of the library?
- What would you change?

11:30–12:30 Lunch Break for Team

12:30–1:15 TWO CONCURRENT SESSIONS

12:30–1:15 Group I: Institutional Planning Office <insert URL for office, building & room>

This group will be a few people from this office. Their work provides ongoing support for institutional planning and decision making.

- From your perspective, how aligned are the library's goals with those of the university?

12:30–1:15 Group II: Office of Research <insert URL for office, building & room>

This group will be a few people from this office. Their work provides support to the scholarly investigation efforts of the academy. They are also responsible for ensuring research integrity, ethics, etc.

- How can the library, as a research partner to faculty and students, best work with your office?
- What is the current relationship between your office and the library?
 - Probe: What are possibilities for the future of this partnership?

1:15–1:30 Break for Team/Walk back to Library

1:15–2:15 Librarians' Council

The Librarians' Council is the professional group within the library, members of which have advanced degrees in librarianship and in subject specializations. Note that there may be professionals working at the library with degrees other than library degrees, and they are not part of this council.

(We have an hour with this group, but we really need to consider what questions will generate the most information. The ones below are ideas,

but we can certainly change these! They will bring up things that lead us in directions that may obviate some of our planned questions; this will be true of all the groups with whom we talk.)

- What are the two or three most important efforts you are currently engaged in? [Each of them can address this question.]
- When you think about the library's *strategic plan*, what strengths do you see in the library that will help you achieve the strategic goals laid out in that document?
- With what groups external to the library do you most frequently work?

2:15–2:30 Break for Team

2:30–3:00 University IT

This unit is responsible for information technology for the campus.

- How does your unit support the library?
- What IT issues are on the horizon that will affect the library?

3:00–4:00 TWO CONCURRENT SESSIONS

3:00–4:00 Group I: Graduate Students

This will be a mixed group from different disciplines.

- What are the challenges you face in doing your research?
- What is your perception of the library's role in supporting graduate study?
- What are your main uses of the library and its services?
- Are there services you would like the library to offer that it doesn't?

3:00–4:00 Group II: Lecturers

This group of lecturers may have very different perceptions and needs from full-time faculty when it comes to the library. We need to try to find out from them what these are. By the time of the site visit, we will have the percentage of lecturers to permanent FTE faculty.

- Tell us how you use the library and its resources in your teaching and assignments?

- What do you wish you could get from the library?
 - Probe: Why is that important to you?

4:00–5:00 University Faculty Group I: Humanities and Social Sciences

This will be an interesting conversation that may range from faculty's own needs to their views of the future of scholarly communication, teaching, and student preparedness. The writing program people should be a part of this as well.

- What are research trends in your particular field? [The purpose of a question like this is to discover where they think their field is going and to then discover how the library might support them.]
 - Probe: What do you depend on to do your best research?
 - Probe: What changes are you seeing in how your field manages scholarship?
- Are there changes in the scholarly communication structures of your field? [This is meant to get at the changes in how scholarship gets out into the world: journals, books, etc.]
- What is the level of information literacy among your students, and how can the library help?
- How have you worked or partnered with the library?
- How does the library fit into your teaching responsibilities?
 - Probe: Does the library function differently in teaching undergraduates vs. graduate students? In what ways?

Wednesday, <Date>

8:30–9:25 University Faculty Group II: Natural Sciences and Engineering

This will be an interesting conversation that may range from faculty's own needs to their views of the future of scholarly communication, teaching, and student preparedness.

- What are research trends in your particular field? [The purpose of a question like this is to discover where they think their field is going and to then discover how the library might support them.]

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- Probe: What do you depend on to do your best research?
- Probe: What changes are you seeing in how your field manages scholarship?
- Are there changes in the scholarly communication structures of your field? [This is meant to get at the changes in how scholarship gets out into the world: journals, books, etc.]
 - Probe: How has the changing nature of scientific publishing changed how you use resources, keep track of your own intellectual property, etc.?
- How have you worked or partnered with the library?
- How does the library fit into your teaching responsibilities?
 - Probe: Does the library function differently in teaching undergraduates vs graduate students? In what ways?

9:30–10:25 Undergraduate Students

This will be a mixed group of students from different disciplines.

- What is the first thing you do when you get an assignment from a professor?
 - Probe: Why do you do that? Go there? Etc.
- What is the instruction from the library like?
 - Probe: How do you use information you learn from library staff?
- What are your main uses of the library and its services?
- Are there services you would like the library to offer that it currently doesn't?

10:25–10:45 Break for Team

10:45–11:30 TWO CONCURRENT SESSIONS

10:45–11:30 Group I: Campus Planning <insert URL for office, building & room>

This office is responsible for prioritizing and allocating capital resources. I do not know who will meet with us, but the conversation could range from the library's building needs (if any) to possible future space enhancement needs (such as additional seating space or even a new wing—see library's

strategic agenda). One thing we need to find out before this conversation is how directly related this office is to the budget process for the library.

- How does the library fit into the current capital plan?
- What is your perception of the future of the library's capital needs?

10:45–11:30 Group II: Center for Excellence in Teaching and Research <insert URL for office, building & room>

This center supports teaching and learning at the university. It provides professional development, workshops in emerging pedagogical methods, etc. [University members of the review team: we could really use your local knowledge of this group to frame some questions.]

- How do you partner with the library to deliver services to faculty?
 - Probe: If there is not much in the way of partnering, we can ask “How might you partner with the library?” or “What might be some powerful areas of mutual advantage?”
 - Probe: How do these collaborations come about? (Extension from above question)
 - Probe: How have you used library resources to conduct workshops, to house digital projects, or to conduct activities that focus on your mission regarding teaching excellence?
- How do other centers on campus and this center work together? On what projects? In what ways?

11:30–noon Team confers to capture initial thinking, share observations

noon–1:00 Working lunch for Full Team with Provost to share initial impressions

1:00–2:30 Team meets to plan next steps and report writing process

Example Two

NOTE: In this example, the agenda was generated by the external reviewers in consultation with an academic officer and reviewers added annotations for guiding questions.

Site visit to X University**Tuesday, <Date>–Wednesday, <Date>***Intended Outcomes*

The site visit will allow ACRL consultants <names> to understand the X University context and will afford time to talk with people both within and outside of the libraries about their views of the strengths and challenges facing the libraries and, in particular, the library at the Y campus, given the impending retirement of the chief librarian of that campus.

Following the site visit, the consultants will provide a written report to help X University administrators and key library personnel ensure they are providing sufficient number and quality of personnel to ensure excellence and to function successfully in an environment of continuous change. During this site visit consultants will seek information to inform their recommendations about

- What to look for in a new campus librarian for Y campus.
- Sharing resources between Y campus and Z campus libraries.
- General development/training needs for current librarians and staff.
- Qualifications for future librarians and staff members to be hired.

Tuesday, <Date>

11:40 a.m.	Flight arrives, secure rental car, transit, lunch
12:30 p.m.	Arrive Y campus
1–1:45 p.m.	Meet provost <i>Purpose:</i> Review intended outcomes, discuss X University context. <ul style="list-style-type: none"> • What are institutional priorities here? • How do the libraries fit into the overall vision of the future of the university? • If you could change anything about the way the two campus library systems work together, what would it be?
1:45–2 p.m.	Walk to library
2–3 p.m.	Meet Y Campus Chief Librarian <i>Purpose:</i> Discuss library strengths and needs, hopes for successor and challenges of position. <ul style="list-style-type: none"> • How do the libraries fit into the overall vision of the future of the university? • How are the librarians involved in campus decision making?

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2–3 p.m., cont.	<ul style="list-style-type: none">• What is working well here now? What are the strengths of this library?• What are programs and initiatives that you hope your successor will carry forward?• What are challenges?• If you could change anything about the way the two campus library systems work together, what would it be?
3–3:45 p.m.	Meet Librarians of Y Campus <i>Purpose:</i> Discuss library strengths and needs, hopes for successor and challenges of position. <ul style="list-style-type: none">• Take a minute to write down what you think are strengths of the Y Library—be specific, report out.• What are some of the challenges of working in a distributed university system?• Talk to us about how you maintain and enhance your knowledge and skills for yourselves and your coworkers. What support do you get from institution?• If you were to ask the new librarian of this campus to change something on day one, what would it be?
3:45 p.m.	Break and prepare
4–4:45 p.m.	Faculty focus group 8–10 people. Mix of humanities, sciences, social sciences, professional schools. Recruit from faculty department chairs/liaisons, library advisory committee, friends group, etc. <i>Purpose:</i> Better understand faculty perceptions of the library and teaching and research needs relative to information resources. <ul style="list-style-type: none">• How do you use the Y Library for your research and teaching?• How do you prepare students to do research?• How do the librarians help your students be more successful in class?
4:45–5:30 p.m.	Tour of Y Campus Library
5:30 p.m.	Transit to hotel, working dinner to share initial observations, review/revise next day's agenda.

Wednesday, <Date>

8–8:45 a.m.	Meet Head of ←Discipline→Library, Z Campus <i>Purpose:</i> Better understand relationship between campus libraries and shared services. <ul style="list-style-type: none">• What is your perception of the relationships between the campuses and between the campus libraries?• You are working to deliver services to all campuses; how difficult is it to do that? What gets in the way? How do you overcome the separation and differences in the campuses?• If you could change anything about the way the two campus libraries work together, what would it be?
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8:45–9 a.m.	Walk to administration building
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9–9:30 a.m.	Meet Chief Academic Administrator of Z Campus <i>Purpose:</i> Discuss Z campus context, relationship with Y campus. <ul style="list-style-type: none">• What are institutional priorities here?• How do the libraries fit into the overall vision of the future of X University?• If you could change anything about the way the two campus libraries work together what would it be?
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9:30–10:15 a.m.	Meet Z Campus Chief Librarian <i>Purpose:</i> Gain insight on relationship between campus libraries and resource sharing, discuss hopes for future with new Y campus colleague. <ul style="list-style-type: none">• How do the libraries fit into the overall vision of the future of the university?• How are the librarians involved in campus decision making?• What is the relationship between the two campus library systems like?• What does each campus library rely on the other for?• If you could change anything about the way the two campus library systems work together, what would it be?
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10:15–10:45 a.m.	Meet Librarians of Z Campus <i>Purpose:</i> Better understand relationship between campus libraries and resource sharing. <ul style="list-style-type: none">• What do you rely on the Y campus library for? What do they rely on you for?• What are three words to describe the relationship between the two campus libraries? [silent writing, then report out]• What are some of the challenges of working in a distributed university system?• If you could change anything about the way the two campus libraries work together what would it be?• Talk to us about how you maintain and enhance your knowledge and skills for yourselves and your co-workers. What support do you get from institution?
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10:45–11:30 a.m.	Transit to Y Campus
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11:30 a.m.– Noon	Arrive and prepare
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Noon–12:45 p.m.	Student focus group, with pizza 8–10 people. Mix of humanities, sciences, social sciences, professional schools. Recruit both undergraduate and graduate students and preferably not student employees of the library. <i>Purpose:</i> Better understand student perceptions of the library. <ul style="list-style-type: none">• What do you think the library is for?• What is the first thing you do when a professor assigns you a paper?• Do the librarians ever come to your classes? If yes, what is that like? What are you able to do because of that?• When you need help, can you find it?
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Successful External Reviews: Process and Practicalities

Noon–12:45 p.m., cont.	<ul style="list-style-type: none">• When you need materials for your research, does the library have what you need or can they get it quickly?• If you could wave a magic wand and change anything in the library what would it be?
12:45–1 p.m.	Break and walk to meeting room in adjacent wing.
1–1:45 p.m.	Meet with department heads for Library Technical Services, Systems, and IT support <i>Purpose:</i> Better understand how these departments support both campus libraries, challenges of joint purchasing and sustaining joint databases, context of shared resources and support they require. <ul style="list-style-type: none">• Tell us about your roles here; with both campus libraries; with IT.• What are some of the challenges of working in a distributed university system?• What are the strengths of each library?• Are there IT infrastructure or training needs that are not being met or enacted?• Talk to us about how you maintain and enhance your knowledge and skills for yourselves and your coworkers. What support do you get from institution?• If you were to ask the new chief librarian of this campus to change something on day one, what would it be?
1:45–2:30 p.m.	Meet paraprofessional library staff at Y Campus Library. <i>Purpose:</i> Better understand their perspective on staffing needs, development and training needs. <ul style="list-style-type: none">• Take a minute to write down what you think are strengths of the library—be specific, report out.• What are some of the challenges of working in a distributed university system?• Talk to us about how you maintain and enhance your knowledge and skills for yourselves and your coworkers. What support do you get from institution?• If you were to ask the new librarian of this campus to change something on day one, what would it be?
2:30–2:45 p.m.	Break to confer and prepare for final meeting.
2:45–3:30 p.m.	Meet Provost <i>Purpose:</i> Share initial impressions, ensure clarity on next steps, overview of timeline.
3:30–5 p.m.	Transit to airport, return rental car, and check in for flight.
6 p.m.	Flight departs.