**Evaluation Form**

**Site Visit**

**Instructions For Site Team**

Evaluations are to be approached from the institution’s perspective and alignment with IACBE expectations, not from the reviewer’s perspective or what is done at the reviewer’s institution. Evaluation of each area requiring review is to be based on the extent to which compliance with IACBE’s expectations has been demonstrated. Final evaluations are assigned one of three assessment levels, with consideration given to the information provided in the Self-Study materials and additional information and insight gained during the site visit. Additional instructions are provided throughout in red.

* Please also complete the OAP Evaluation Form.
* Be sure to upload all documentation provided by the business unit during the site visit in the ReceivedDuringVisit folder.
* Use the spaces provided at the end of this form to document your notes from meetings, discussions, coaching sessions.

The following rubric is provided to ensure inter-rater reliability and consistency in the application of each evaluation level. Recommendations for general improvement are to be discussed during the site visit during one of the peer mentoring opportunities (OAP discussion, meetings with primary representative and designees, end of day exits, etc). Mark an X in the column for the team’s final evaluation level.

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| **Yes** | **Limited** | **No** |
| Compliance with IACBE’s expectations has been satisfactorily demonstrated with no deficiencies to any degree. There are no areas in need of improvement in the demonstration of compliance. | Compliance with IACBE’s expectations has been demonstrated – but in a limited capacity that risks a future evaluation of non-compliance. Recommendations for improvement are provided. | Compliance with IACBE’s expectations has not been demonstrated. |

* An indication of “Yes” means all programs meet the expectation. No further action on your part is needed.
* An indication of “Limited” means that while all programs meet compliance, the team has recommendations for improving demonstration of compliance. In other words, compliance = yes, but with Recommendation(s) to be included in the Report of Findings. Indicate the line-item number and details of your suggestion for improving demonstration of compliance with the Principle. These will be included in the Report of Findings as Recommendations.
  + This is also where you will indicate missing documentation relevant to the Principle that needs to be provided.
* An indication of “No” means the program(s) and/or business unit do not meet compliance.
  + For each item marked “No”, in the Team Summary for that section indicate the line-item number and details of the deficiency(ies) that needs to be addressed to demonstrate compliance with IACBE expectation. These will be included in the Report of Findings as Action Findings.
* When making the determination of Action Finding (“NO”) vs. Recommendation (“Limited”) consider whether it is materially impactful on compliance versus a helpful recommendation. Does the deficiency indicate that the business unit is out of compliance with the Principle or is it something that, if addressed, will improve the business unit’s demonstration of its compliance?
  + If your recommendation is for continuous improvement, it is part of your Peer Coaching/Mentoring role and should be discussed in any or all of the coaching sessions throughout the visit. These are also to be documented at the end of this report box “Notes From Your Peer Coaching/Mentoring Sessions”
* In the General Comments box provided for each Principle, include any comments, observations or information gained during the site visit relevant to the Principle. This is information any future reviewers should be aware of: remember – you are the eyes and ears for IACBE staff and the Board of Commissioners, so it is important you document what you learned so future reviewers have the benefit of that additional knowledge to make informed decisions.

EXAMPLES:

| **Team Summary: Principle 4**  **Excellence in business education is demonstrated by business programs that prepare students to be competent business professionals. This includes processes for program development and design, curricular content and learning opportunities, and curriculum review, renewal, and improvement.** | |
| --- | --- |
|  | **NO: Explain deficiency to be addressed (Action Finding)** |
| 3. It was not clearly demonstrated through the narrative or in conversations with faculty and the advisory board that the business unit involves external communities of interest into its curriculum management process.  10. The business unit was not able to explain why Data Analytics is not covered in its Bachelor of Marketing program. | |
|  | **LIMITED: Provide Recommendations for improvement** |
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| **RECOGNITIONS: Provide areas that correspond to Principle 4 for which the business unit should be recognized (no line item # needed)** | |
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| **Team Summary: Principle 5**  **Excellence in business education is demonstrated by highly-qualified faculty who are current in their professions. This includes processes and procedures to manage and develop faculty and that creates a climate that promotes excellence in teaching and learning.** | |
|  | **NO: Explain deficiency to be addressed (Action Finding)** |
| 7. The business unit was not able to demonstrate that its faculty review/evaluation process takes into consideration teaching effectiveness. | |
|  | **LIMITED: Provide Recommendations for improvement** |
| A2: CVs for the following were not provided:   * S. Snowflake * M. Nature | |
| **RECOGNITIONS: Provide areas that correspond to Principle 5 for which the business unit should be recognized (no line item # needed)** | |
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**SUMMARY INFORMATION**

Please complete the following summary table. The items in red indicate where the information can be found: please delete and replace with the actual information.

|  |  |
| --- | --- |
| Institution | |
| Self-Study | |
| Location | |
| Self-Study | |
| Academic Business Unit(s) | |
| Self-Study | |
| Site-Visit Chair: |  |
| Team Member(s): |  |
| Self-Study Year: | Self-Study |
| Visit Dates: | Site Visit Evaluation Form |
| Total Institutional Enrollment: | In Profile Folder “Enrollment Profile Form” |
| Total Enrollment in Programs Seeking Specialized Accreditation: | In Profile Folder “Enrollment Profile Form” |
| Total Full-Time Faculty: | In Principle 5 folder: “Number of Faculty” |
| Total Part-Time/Adjunct Faculty: | In Principle 5 folder: “Number of Faculty” |

From the Business Programs and Locations Form:

Programs Seeking Specialized Accreditation:

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| **Business Program(s)** |
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Locations that Offer any of the above programs:

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| **Locations** | |
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| **Principle 1: Ethics** | | **Yes** | **Limited** | **No** |
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| 1 | The business unit provides a clear description of how it actively promotes ethical behavior of faculty and students.  CONSIDERATIONS:   * Are diversity, equity, and inclusion included in their practices? |  |  |  |
| 2 | The business unit demonstrates integration of ethical behaviors and practices in its activities both in and out of the classroom.  CONSIDERATIONS:   * Is it incorporated into the curriculum? * Do faculty model ethical behaviors? |  |  |  |
| 3 | The business unit has a process in place for ensuring responsible behavior of all stakeholders. |  |  |  |
| 4 | The business unit has a system in place for reporting and detecting breaches of ethical behavior, and demonstrates it addresses these breaches in a way that includes implementation of action plans to mitigate repeat occurrences. |  |  |  |
| A1 | The business unit has provided clear written policies and procedures regarding ethical behaviors that are available to all stakeholders. |  |  |  |

- Did information gained during conversations with various constituents align with what was written?

- Be sure to evaluate from the perspective of the environment in which the business unit operates: what is their culture?

In the table below, review the Principle statement and consider whether overall compliance with IACBE’s expectation has been demonstrated (refer to the rubric in the instructions as well as the statement of expectation in the Self-Study manual). Place an “X” to the left of your overall assessment (NO or LIMITED)

If an Action Finding or Recommendation is to be assigned, indicate the line-item number from above (if applicable), followed by the corresponding comment.

| **Team Summary: Principle 1**  **Excellence in business education is demonstrated when the business unit acts ethically, responsibly, and with integrity in all interactions with its stakeholders and has established systems for encouraging and upholding ethical and responsible behavior.** | |
| --- | --- |
|  | **NO: Explain deficiency to be addressed (Action Finding)** |
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|  | **LIMITED: Provide Recommendations for improvement** |
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| **RECOGNITIONS: Provide areas that correspond to Principle 1 for which the business unit should be recognized (no line item # needed)** | |
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| **GENERAL NOTES – PRINCIPLE 1** |
| **Please include notes and comments on your observations, information gained and important take-aways from the site visit** |
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| LIAISON NOTES |
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| **Principle 2: Assessment and Advancement** | | **Yes** | **Limited** | **No** |
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| 1 | There is a clear description of the process employed by the business unit for the development, periodic review, and renewal of its Outcomes Assessment Plan (OAP).   * Were ~~there~~ areas of opportunity identified for improvement of the *business unit’s assessment process*? If so, has an action plan for improvement been provided? |  |  |  |
| 2 | There is a sound analysis of the student learning results for each Intended Student Learning Outcome (ISLO) assessed during the Self-Study year.   * For each ISLO that was Not Met, there is a reasonable analysis of why, or an action plan for improvement. |  |  |  |
| 3 | There is an action plan presented for each area of opportunity identified for improving *student achievement of the ISLOs*.  CONSIDERATIONS:   * Did these action plans include changes to performance targets, ISLOs to be assessed, assessment measures being used? If so, are these changes reflected in the forward-looking OAP? |  |  |  |
| 4 | There is a sound analysis of the operational outcomes results for each Intended Operational Outcome (IOO) assessed during the Self-Study year.   * For each IOO that was Not Met, there is a reasonable analysis of why, or an action plan for improvement. |  |  |  |
| 5 | There is an action plan presented for each area of opportunity identified for improving *operational outcomes.*  CONSIDERATIONS:   * Did these action plans include changes to performance targets, IOOs to be assessed, assessment measures being used? If so, are these changes reflected in the forward-looking OAP? |  |  |  |
| A1 | Student Learning Assessment Results for each ISLO evaluated during the Self-Study year were provided |  |  |  |
| A2 | Operational Assessment Results for each ISLO evaluated during the Self-Study year were provided |  |  |  |
| A3 | A forward-looking OAP was provided |  | | |
| A3 | The forward-looking OAP meets IACBE expectations. ***If “No” or “Limited” refer to the OAP Review Form for the evaluation of the OAP*** |  |  |  |

In the table below, review the Principle statement and consider whether overall compliance with IACBE’s expectation has been demonstrated (refer to the rubric in the instructions as well as the statement of expectation in the Self-Study manual). Place an “X” to the left of your overall assessment (NO or LIMITED)

If an Action Finding or Recommendation is to be assigned, indicate the line-item number from above (if applicable), followed by the corresponding comment.

| **Team Summary: Principle 2**  **Excellence in business education is demonstrated when the business unit is engaged in a process of continuous improvement in its programs and operations. This process includes assessment planning, collection and analysis of assessment data, and development and execution of action plans for improvements.** | |
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|  | **NO: Explain deficiency to be addressed (Action Finding)** |
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|  | **LIMITED: Provide Recommendations for improvement** |
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| **RECOGNITIONS: Provide areas that correspond to Principle 2 for which the business unit should be recognized (no line item # needed)** | |
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| **GENERAL NOTES – PRINCIPLE 2** |
| **Please include notes and comments on your observations, information gained and important take-aways from the site visit** |
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| LIAISON NOTES |
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| **Principle 3: Strategic Planning** | | **Yes** | **Limited** | **No** |
| --- | --- | --- | --- | --- |
| 1 | There is a sound explanation as to how the business unit’s mission guides and contributes to improving quality in business education. |  |  |  |
| 2 | The business unit’s mission statement is readily available to the general public. |  |  |  |
| 3 | The business unit employs a process of strategic planning. |  |  |  |
| A1 | Documentation that supports/demonstrates the business unit’s employment of a strategic planning process were provided. |  |  |  |

In the table below, review the Principle statement and consider whether overall compliance with IACBE’s expectation has been demonstrated (refer to the rubric in the instructions as well as the statement of expectation in the Self-Study manual). Place an “X” to the left of your overall assessment (NO or LIMITED)

If an Action Finding or Recommendation is to be assigned, indicate the line-item number from above (if applicable), followed by the corresponding comment.

| **Team Summary: Principle 3**  **Excellence in business education is demonstrated by an informed, effective strategic planning process that focuses the business unit’s decision making toward defined goals, is linked to the unit’s outcomes assessment process, and provides an overall strategic direction for guiding the unit into the future.** | |
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|  | **NO: Explain deficiency to be addressed (Action Finding)** |
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|  | **LIMITED: Provide Recommendations for improvement** |
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| **RECOGNITIONS: Provide areas that correspond to Principle 3 for which the business unit should be recognized (no line item # needed)** | |
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| **GENERAL NOTES – PRINCIPLE 3** |
| **Please include notes and comments on your observations, information gained and important take-aways from the site visit** |
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| LIAISON NOTES |
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| **Principle 4: Business Curricula and Learning Opportunities** | | **Yes** | **Limited** | **No** |
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| 1 | The curriculum requirements for each program seeking accreditation are readily available to the general public. |  |  |  |
| 2 | The credit/clock hour definition is provided. |  |  |  |
| 3 | It was demonstrated that there is a curriculum management process employed by the business unit that:   * Involves faculty and external communities of interest * Incorporates the results from implementation of the Outcomes Assessment Plan |  |  |  |
| 4 | An example demonstrating implementation of the curriculum management process was provided. |  |  |  |
| 5 | If applicable: the business unit has processes in place that ensure equivalent quality in delivery of education across all delivery modes. |  |  |  |
| 6 | If applicable: the business unit has processes in place that ensure equivalent quality in delivery of education across all locations all locations offering part or all of program(s) seeking accreditation.  CONSIDERATIONS:   * Refer to Appendix B in the Profile section – Business Programs and Locations Form |  |  |  |
| 7 | If applicable: the business unit has processes in place that ensure equivalent quality in delivery of education of any component delivered by a partner institution. |  |  |  |
| 8 | The business unit has processes in place that ensure content being delivered, and available experiential opportunities, are relevant to the current business environment. |  |  |  |
| 9 | Each program seeking accreditation includes learning opportunities that prepare students to function effectively in culturally diverse environments. |  |  |  |
| 10 | If applicable: the business unit provides its rationale for not including (a) Foundational Body of Knowledge subject area(s). |  |  |  |
| 11 | The business unit has processes in place for its undergraduate programs that evaluate student learning outcomes specific to each disciplinary component of its programs, and processes that ensure academic quality in those components. (“components” = majors, specializations, concentrations, etc.) |  |  |  |
| 12 | There is a clear description of the high impact practices within the undergraduate programs. |  |  |  |
| 13 | The business unit has processes in place for its master’s-level programs that evaluate student learning outcomes specific to each disciplinary component of its programs, and processes that ensure academic quality in those components. (“components” = majors, specializations, concentrations, etc.) |  |  |  |
| 14 | There is a clear description of the high impact practices within the master’s-level programs. |  |  |  |
| 15 | There is a clear explanation of how research directed toward challenges facing business professionals is integrated into each master’s-level program. |  |  |  |
| 16 | The business unit has processes in place that ensure student achievement of advanced disciplinary knowledge in the Foundational Body of Knowledge content areas relevant to their master’s program. |  |  |  |
| 17 | It was demonstrated that each doctoral-level program develops students into individuals capable of contributing to the academy or professional practice in at least the following areas:   * advanced knowledge in areas of business specialization * advanced research skills * dissertation or other research or practice-focused component * development of a sophisticated understanding of the importance of professional ethics, values, and integrity in support of business’s broad societal and economic purposes |  |  |  |
| 18 | The business unit has processes in place for its doctoral-level programs that evaluate student learning outcomes specific to each disciplinary component of its programs, and processes that ensure academic quality in those components. (“components” = majors, specializations, concentrations, etc.) |  |  |  |
| 19 | The business unit has processes in place that ensure doctoral students master the disciplinary knowledge in their areas of business specialization and acquire the advanced research skills necessary for contributing to the theoretical or practical body of knowledge in business. |  |  |  |
| A1 | The Program Design table is complete and accurate |  |  |  |
| A2 | Documentation demonstrating implementation of the curriculum development process |  |  |  |
| A3 | A foundational Body of Knowledge table for each undergraduate program was submitted, is complete, and accurately demonstrates the level to which each subject area is covered |  |  |  |
| A4 | If applicable: the table listing Student Doctoral Research is provided |  |  |  |
| A5 | Course syllabi for each undergraduate program support the level of coverage of each subject area as indicated in the Foundational Body of Knowledge table |  |  |  |
| A6 | Sample doctoral dissertations were provided. |  |  |  |

- In your conversations with faculty, did they confirm whether they actively participate in curriculum process?

- In your conversations with administration: could they speak to the curriculum process? And is their explanation consistent with what was written?

- Compare information gathered in conversation with syllabi with tables. Is there consistency?

- Review syllabi: for undergrad programs: do they demonstrate that each Foundational Areas of Business is covered at the learning level indicated on the table?

- Review dissertations: helps to give insight into quality of research

In the table below, review the Principle statement and consider whether overall compliance with IACBE’s expectation has been demonstrated (refer to the rubric in the instructions as well as the statement of expectation in the Self-Study manual). Place an “X” to the left of your overall assessment (NO or LIMITED)

If an Action Finding or Recommendation is to be assigned, indicate the line-item number from above (if applicable), followed by the corresponding comment.

| **Team Summary: Principle 4**  **Excellence in business education is demonstrated by business programs that prepare students to be competent business professionals. This includes processes for program development and design, curricular content and learning opportunities, and curriculum review, renewal, and improvement.** | |
| --- | --- |
|  | **NO: Explain deficiency to be addressed (Action Finding)** |
|  | |
|  | **LIMITED: Provide Recommendations for improvement** |
|  | |
| **RECOGNITIONS: Provide areas that correspond to Principle 4 for which the business unit should be recognized (no line item # needed)** | |
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| **GENERAL NOTES – PRINCIPLE 4** |
| **Please include notes and comments on your observations, information gained and important take-aways from the site visit** |
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| LIAISON NOTES |
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| **Principle 5: Business Faculty Characteristics, Activities, and Processes** | | **Yes** | **Limited** | **No** |
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| 1 | The business unit employs a policy for hiring faculty that includes qualification review in addition to other criteria. |  |  |  |
| 2 | If applicable, the business unit provides their justification for not having all faculty teaching in doctoral level programs fall into the Academic category of faculty qualification. |  |  |  |
| 3 | There is an appropriate faculty member identified as the subject matter expert for each major, specialization, concentration, etc. subject area. |  |  |  |
| 4 | There is a faculty development program in place that requires faculty to participate in scholarly activities, professional development activities, and to remain current in their fields. |  |  |  |
| 5 | It is demonstrated that the knowledge and skills gained through faculty development activities is integrated into the classroom. |  |  |  |
| 6 | The business unit fosters and rewards faculty participation in development activities. If such promotion is supported financially, there is an explanation of how funding amounts are determined and how they are accessed by faculty. |  |  |  |
| 7 | The business unit employs a faculty performance review/evaluation process that incorporates some measure of teaching effectiveness. |  |  |  |
| 8 | The business unit employs a faculty performance review/evaluation process that requires faculty to participate in scholarly activities, professional development activities, and to remain current in their fields. |  |  |  |
| A1 | The Faculty Qualifications table demonstrates all faculty who taught during the self-study year are qualified to teach the subject areas they delivered. |  |  |  |
| A2 | If the information (degree, certifications, etc) indicated on the table does not support teaching in the assigned subject area, does the CV and/or justification form provide additional education or other activities that do?  NOTE: if any CVs are missing, indicate “Limited” then in the summary table list which ones need to be provided. If the individual no longer is employed – do not request a CV. |  |  |  |
| A3 | The summary of Faculty Qualifications table is provided. |  |  |  |
| A4 | The Summary of Faculty Development Activities is provided. |  |  |  |
| A5 | Clear policies for hiring faculty, evaluating faculty, and faculty scholarly and development activities are provided. |  |  |  |
| A6 | The business unit provides its faculty evaluation instruments (forms, observation rubrics, etc.) |  |  |  |
| A7 | (Redacted) Samples of actual faculty evaluations complete during the Self-Study year are provided. |  |  |  |

- Are there internal practices that support faculty development?

- How are lower performing faculty identified?

- Is there a process for addressing improvement?

In the table below, review the Principle statement and consider whether overall compliance with IACBE’s expectation has been demonstrated (refer to the rubric in the instructions as well as the statement of expectation in the Self-Study manual). Place an “X” to the left of your overall assessment (NO or LIMITED)

If an Action Finding or Recommendation is to be assigned, indicate the line-item number from above (if applicable), followed by the corresponding comment.

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| **Team Summary: Principle 5**  **Excellence in business education is demonstrated by highly-qualified faculty who are current in their professions. This includes processes and procedures to manage and develop faculty and that creates a climate that promotes excellence in teaching and learning.** | |
|  | **NO: Explain deficiency to be addressed (Action Finding)** |
|  | |
|  | **LIMITED: Provide Recommendations for improvement** |
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| **RECOGNITIONS: Provide areas that correspond to Principle 5 for which the business unit should be recognized (no line item # needed)** | |
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| **GENERAL NOTES – PRINCIPLE 5** |
| **Please include notes and comments on your observations, information gained and important take-aways from the site visit** |
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| LIAISON NOTES |
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| **Principle 6: Polices, Procedures, and Processes** | | **Yes** | **Limited** | **No** |
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| 1 | There are clear admissions policies that include procedures that:   * ensure students a reasonable chance to succeed in their chosen program * are appropriate to the degree level of the program * are available to the general public |  |  |  |
| 2 | The business unit has procedures in place to ensure students who are admitted to graduate programs have the foundational knowledge and skills that prepare them with a reasonable chance to succeed |  |  |  |
| 3 | There are clear policies regarding transfer of credit that:   * ensure comparable quality to those of the business unit’s own programs * ensure that the institution(s) where the credits were conferred have institutional accreditation or approval from an agency appropriate to its geographic location * are made readily available to the general public |  |  |  |
| 4 | There are clear policies regarding evaluation of credit granted for work or life experience, and/or other prior non-academic learning that:   * ensure the knowledge/skills gained from these experiences is comparable in quality to the learning/skills to be gained in the business unit’s own programs * are made readily available to the general public |  |  |  |
| 5 | If applicable, there is a reasonable explanation for any exceptions made to the admissions policies during the Self-Study year. |  |  |  |
| 6 | There are clear policies covering the standards for:   * academic performance of students * identifying retention issues and at-risk students * providing academic counseling and support services * placing of students on academic sanction (e.g., warning, probation, suspension, etc.) * student dismissals |  |  |  |
| 7 | The business unit employs a process for ensuring student progress towards degree completion. |  |  |  |
| 8 | The business unit demonstrates that the policies/procedures for student academic performance and progress are effective. |  |  |  |
| 9 | If applicable, there is a reasonable explanation for any exceptions made to academic policies during the Self-Study year. |  |  |  |
| 10-11 | There is a system of support services available for business students that includes:   * career planning * interview preparation * employment search / placement assistance * career development |  |  |  |
| 12 | The business unit demonstrated that the systems of career development support are effective. |  |  |  |
| A1 | The business unit provided data in the table of Students Subject to Academic Sanctions |  |  |  |
| A2 | Clear policies/procedures were provided that govern:   * admissions to the programs seeking accreditation * granting academic credit for prior non-academic learning experience * academic performance and student progress |  |  |  |

In the table below, review the Principle statement and consider whether overall compliance with IACBE’s expectation has been demonstrated (refer to the rubric in the instructions as well as the statement of expectation in the Self-Study manual). Place an “X” to the left of your overall assessment (NO or LIMITED)

If an Action Finding or Recommendation is to be assigned, indicate the line-item number from above(if applicable), followed by the corresponding comment.

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| **Team Summary: Principle 6**  **Excellence in business education is demonstrated by clear, transparent, and effective policies, procedures, and processes related to admissions, academic performance, and career development that are implemented in a fair and consistent manner and are aligned with the business unit’s mission.** | |
|  | **NO: Explain deficiency to be addressed (Action Finding)** |
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|  | **LIMITED: Provide Recommendations for improvement** |
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| **RECOGNITIONS: Provide areas that correspond to Principle 6 for which the business unit should be recognized (no line item # needed)** | |
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| **GENERAL NOTES – PRINCIPLE 6** |
| **Please include notes and comments on your observations, information gained and important take-aways from the site visit** |
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| LIAISON NOTES |
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| **Principle 7: Resources Supporting Business Programs** | | **Yes** | **Limited** | **No** |
| 1 | There is a clearly defined process for budgeting that includes identifying needed resources, and the process for securing the necessary funding. |  |  |  |
| 2 | The budgeting process supports the needs of the business unit’s achievement of its mission and delivery of quality education. |  |  |  |
| 3 | The business unit demonstrated how expenditures in the following areas are sufficient to support quality delivery of education:   * Faculty * Faculty development activities * Technology * Classroom resources * Learning resources (incl. library) * Overall educational & general expenditures |  |  |  |
| 4 | The business unit has facilitated improvement in student learning. |  |  |  |
| 5 | There is a clear explanation of how the available physical resources support a high-quality learning environment. |  |  |  |
| 6 | There is a clear explanation of how the available technological resources support a high-quality learning environment. |  |  |  |
| 7 | It was demonstrated that recent (< 3 years) resource acquisitions improved the quality of business education. |  |  |  |
| 8 | If applicable: it was demonstrated that other locations that deliver any component of business education or the programs seeking accreditation employ resources that are at least equivalent. |  |  |  |
| A1 | Faculty Salary Information form was provided and is complete. |  |  |  |
| A2 | A list of relevant databases and learning resources was provided. |  |  |  |

In the table below, review the Principle statement and consider whether overall compliance with IACBE’s expectation has been demonstrated (refer to the rubric in the instructions as well as the statement of expectation in the Self-Study manual). Place an “X” to the left of your overall assessment (NO or LIMITED)

If an Action Finding or Recommendation is to be assigned, indicate the line-item number from above (if applicable), followed by the corresponding comment.

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| **Team Summary: Principle 7**  **Excellence in business education is demonstrated by resources that are sufficient to support a high-quality learning environment in the business unit and to accomplish its mission and broad-based goals.** | |
|  | **NO: Explain deficiency to be addressed (Action Finding)** |
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|  | **LIMITED: Provide Recommendations for improvement** |
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| **RECOGNITIONS: Provide areas that correspond to Principle 7 for which the business unit should be recognized (no line item # needed)** | |
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| **GENERAL NOTES – PRINCIPLE 7** |
| **Please include notes and comments on your observations, information gained and important take-aways from the site visit** |
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| **Principle 8: External Relationships** | | **Yes** | **Limited** | **No** |
| 1 | The business unit demonstrated that its linkages with relevant external constituents benefit its ongoing quality improvement of delivery of business education and achievement of its mission. |  |  |  |
| A1 | The webpaths to the Public Disclosure of Student Achievement (PDSA) and statement of IACBE accreditation are accurate.  CONSIDERATONS:   * Is the statement regarding IACBE accreditation accurate and current? Refer to the “Public Statements of IACBE Membership” found on the IACBE website under Accreditation > Compliance: <https://iacbe.org/accreditation/compliance/> * Does the PDSA report an achievement metric for each IACBE-accredited program? * Does the PDSA indicate the business unit’s target for each metric disclosed? * Are they meeting those intended targets? * Would the definition(s) of each metric disclosed make sense to the general public? |  |  |  |

In the table below, review the Principle statement and consider whether overall compliance with IACBE’s expectation has been demonstrated (refer to the rubric in the instructions as well as the statement of expectation in the Self-Study manual). Place an “X” to the left of your overall assessment (NO or LIMITED)

If an Action Finding or Recommendation is to be assigned, indicate the line-item number from above (if applicable), followed by the corresponding comment.

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| **Team Summary: Principle 8**  **Excellence in business education is demonstrated when the business unit maintains current linkages with external stakeholders that are consistent with the unit’s mission and broad-based goals.** | |
|  | **NO: Explain deficiency to be addressed (Action Finding)** |
|  | |
|  | **LIMITED: Provide Recommendations for improvement** |
|  | |
| **RECOGNITIONS: Provide areas that correspond to Principle 8 for which the business unit should be recognized (no line item # needed)** | |
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| **GENERAL NOTES – PRINCIPLE 8** |
| **Please include notes and comments on your observations, information gained and important take-aways from the site visit** |
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| LIAISON NOTES |
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| **Principle 9: Innovation in Business Education** | | **Yes** | **Limited** | **No** |
| 1 | The business unit employs practices that support and encourage innovation and creativity in the delivery of business education. |  |  |  |
| 2 | It was demonstrated that educational innovation is accomplished. |  |  |  |

- May be observed during the campus tour

- Consider the environment in which the business unit operates: what do they do that could be considered innovative within that framework?

In the table below, review the Principle statement and consider whether overall compliance with IACBE’s expectation has been demonstrated (refer to the rubric in the instructions as well as the statement of expectation in the Self-Study manual). Place an “X” to the left of your overall assessment (NO or LIMITED)

If an Action Finding or Recommendation is to be assigned, indicate the line-item number from above (if applicable), followed by the corresponding comment.

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| **Team Summary: Principle 9**  **Excellence in business education requires the business unit to adapt to changes in the business profession and society. Therefore, the business unit must provide an environment that encourages and recognizes innovation and creativity in the education of business students.** | |
|  | **NO: Explain deficiency to be addressed (Action Finding)** |
|  | |
|  | **LIMITED: Provide Recommendations for improvement** |
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| **RECOGNITIONS: Provide areas that correspond to Principle 9 for which the business unit should be recognized (no line item # needed)** | |
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| **GENERAL NOTES – PRINCIPLE 9** |
| **Please include notes and comments on your observations, information gained and important take-aways from the site visit** |
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| LIAISON NOTES |
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| **FINAL RECOMMENDATION** | |
| Based on the information provided in the above analysis, the evaluation provided in the additional Outcomes Assessment Plan Review Form, and information/insight gained during the site visit, the site team makes the following recommendation regarding accreditation of each of the programs seeking specialized accreditation: | |
|  | Approve: all programs and the business unit demonstrate compliance with IACBE expectations for all Principles.   * May be recommendations for improvement (refer to above) |
|  | Approve pending resolution of Action Findings: all programs and the business unit will demonstrate compliance with IACBE expectations for all Principles if they adequately address the Action Findings identified above.   * May also be recommendations for improvement (refer to above) |
|  | Identified areas to be resolved that warrant consideration for deferring accreditation of the following programs: (list the programs – if all, simply state “all”) |
|  | Identified areas to be resolved that warrant consideration for denying accreditation of the following programs: (list the programs – if all, simply state “all”) |

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| **PROFILE INFORMATION** | | **Yes** | **Not Provided/ Not Complete** |
| 1 | Academic Year definition |  |  |
| 2 | 12-month Self-Study year period |  |  |
| 3 | Relationship between business unit and institution |  |  |
| 4 | If applicable: special consideration requests |  |  |
| A | Business unit’s organizational chart |  |  |
| B | Business Programs and Locations Form |  |  |
| C | Copies of official program completion documents for each program seeking accreditation  CONSIDERATIONS:   * Do the program names match what is listed in the Business Programs and Locations Form? |  |  |
| D | Enrollment Profile Form (two tables) |  |  |
| E | TABLE: Degrees Conferred |  |  |
| F | TABLE: Number of Faculty |  |  |
| G | If applicable: proof of authorization to award degrees in non-home country (ies) |  |  |

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| **Team Summary: PROFILE INFORMATION** |
| **For each item marked “Not Provided/Not Complete” indicate the line-item number/letter and what deficiency needs to be resolved.** |
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| LIAISON NOTES |
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| **NOTES FROM MEETING WITH FACULTY** |
| **Please include notes and important take-aways from the meeting.** |
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| **NOTES FROM MEETING WITH CEO / CAO** |
| **Please include notes and important take-aways from the meeting.** |
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| **NOTES FROM MEETING WITH STUDENTS** |
| **Please include notes and important take-aways from the meeting.** |
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| **NOTES FROM MEETING WITH EXTERNAL CONSTITUENTS** |
| **Please include notes and important take-aways from the meeting.** |
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| **NOTES FROM YOUR PEER COACHING/MENTORING SESSIONS** |
| **Please include notes and important take-aways from the meeting. This includes the ideas for improvement that you recommended to the business unit: things like adding faculty, or ideas for engaging external stakeholders, or ways to better incorporate international dimensions into courses.** |
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| **IACBE STAFF LIAISON notes**: |
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