Policy of Quebec Universities for the Periodic Evaluation of Current Academic Programmes

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# TABLE OF CONTENTS

Introduction to the documents.............................................................................................................. 5

Introduction....................................................................................................................................... 7

1 The Policy ..................................................................................................................................... 9

  1.1 Purpose of the evaluation......................................................................................................... 9
  1.2 Stages in the evaluation .......................................................................................................... 9
  1.3 Evaluation criteria .................................................................................................................. 9
  1.4 Evaluation procedures........................................................................................................... 10

2 Information to be forwarded to the Programme Evaluation Review Commission ............... 11

Related documents

  I Companion document to the *Policy of Quebec Universities for the Periodic Evaluation of
  Current Academic Programmes* .................................................................................................. 15

  II Review Procedure of the Programme Evaluation Review Commission .......................... 41
INTRODUCTION TO THE DOCUMENTS

The purpose of these three documents is to improve the quality and relevance of programmes offered in Quebec universities.

These texts are an update of previous documents of CREPUQ. They are designed to reflect the evolution of policies and practices for the periodic evaluation of programmes during the past decade and to clarify certain issues related to these activities.

The Policy of Quebec Universities for the Periodic Evaluation of Current Academic Programmes defines the minimum standards and conditions which the processes and criteria for determining the quality and relevance of programmes are expected to meet. This framework should guide universities in the development of their institutional policies.

The Companion Document seeks to clarify certain points of the policy for the guidance of those responsible for periodic evaluation. It may also help the institutions see how the principles and criteria adopted by CREPUQ can be applied in their particular situation.

The document entitled Review Procedure describes the specific method of operation of the Programme Evaluation Review Commission in the exercise of its mandate. It indicates the desire of the Commission to encourage dialogue with institutions in a perspective of improving programmes and ensuring a follow up to evaluations.
INTRODUCTION

Some years ago, Quebec universities established procedures for the evaluation of their academic programmes. In 1991, a survey of policies and practices for the evaluation of current programmes showed, however, that the evaluation processes were different from one institution to another and that the experience and expertise acquired by institutions varied as well. As a result, the universities agreed to establish a common frame of reference for assessment.

The Policy of Quebec Universities for the Periodic Evaluation of Current Academic Programmes (hereinafter referred to as the Policy) was adopted by the Conférence des recteurs et des principaux des universités du Québec (CREPUQ) in March 1991. Since that time, the Policy has made it possible to ensure that each institution has implemented an evaluation policy that meets minimum conditions and standards. These are recognized as appropriate and consistent with the requirements for quality and relevance which the Quebec society as a whole considers necessary for higher education. The Policy also was in response to the expectations of various educational, social and economic communities.

The Policy includes an external review procedure allowing for the review of all institutional policies and practices over a cycle of approximately seven years. This review procedure respects the flexibility required by a common framework of programme evaluation.

The implementation of this procedure is entrusted to the Programme Evaluation Review Commission (Commission de vérification de l'évaluation des programmes) whose mandate is to verify the appropriateness of institutional policies and practices with respect to the goal, stages, criteria and procedures established under the terms of the present Policy. Where necessary, the Commission will recommend that an institution take steps to improve its evaluation process.

The Commission is composed of five members who are appointed by the Board of Directors of CREPUQ for a three-year term, renewable once; where possible, the members will remain in office until such time as a replacement is appointed. The Commission members are to be respected persons who know the university environment well and who can perform their work without apparent conflict of interest.

In carrying out its mandate, the Commission is autonomous. The recommendations it makes are addressed to the institutions concerned and are not subject to the approval of any committee of CREPUQ. The timetable for its work sessions is established through consultation with the institutions.
1 THE POLICY

The universities are responsible for the planning and evaluation of their teaching and learning activities. They agree, however, that for purposes of accountability and openness, any institutional policy for the periodic evaluation of current programmes, in order to be credible, must meet the following requirements.

1.1 Purpose of the evaluation

The primary purpose of the periodic evaluation process is to improve the quality and relevance of academic programmes offered by the universities at all levels and in all academic areas, with a view to fostering their further development.

The present Policy deals with all degree programmes (bachelor’s, master’s and doctoral degrees). Provided that appropriate adjustments are made, it can be applied to certificate and diploma programmes, and to the concurrent evaluation of several related programmes. It can also be applied to the evaluation of teaching and research units (departments, schools, faculties, institutes, etc.) provided that the focus remains on the programmes.

Moreover, it is understood that the reports submitted in the context of seeking accreditation of a programme by an authority other than the university may be used as part of the periodic evaluation.

1.2 Stages in the evaluation

The institutional policy for the periodic evaluation of academic programmes must consist of three distinct stages, as follows:

a) Self-evaluation by the faculty members and students involved in the appraised programme, based on the record compiled during the previous periodic evaluation, the follow-up on recommendations and the results of continuing evaluation.

b) Opinion of at least two external experts who are specialists in the discipline, and, if need be, the opinion of those who are in charge of professional internships or of representatives from the socio-economic sectors concerned.

c) Final evaluation report by an institutional committee composed of faculty members who are not involved in the programme being evaluated and, depending on the institutional policy, academic administrators.

1.3 Evaluation criteria

The institutional policy for periodic evaluations must specify that the evaluation of a programme should be based, as a minimum, on the following criteria:

a) clarity and validity of the programme’s learning objectives;

b) compliance of the programme’s objectives with the institution’s mission and development plans;
c) appropriateness of admission criteria for the programme with respect to the learning objectives;

d) appropriateness of the programme’s structure with respect to learning objectives;

e) consistency between the content of learning activities and the development of the discipline or field of study;

f) appropriateness of teaching, learning and assessment strategies with respect to the programme’s objectives;

g) appropriateness of human resources, including part-time faculty members and instructors, with respect to the training provided, considering especially the professorial resources required to ensure adequate supervision of students, and, in the case of graduate programmes, to constitute a critical mass of active researchers;

h) appropriateness of physical and financial resources with respect to the programme’s objectives;

i) relevance of the programme under three aspects: institutional relevance (status of the programme within the institution), inter-university relevance (status of the programme within the Quebec university system), social relevance (with respect to society’s expectations and needs regarding the education provided by the programme).

The institutional policy for periodic evaluations must also provide for indicators that reflect the evolution of the academic staff (degrees obtained, universities where degrees were obtained, teaching loads, research performance, major publications, amounts of the grants received, granting organizations, etc.) as well as the evolution of the student clientele (applications and registrations, graduation rates, length of studies, etc.).

### 1.4 Evaluation procedures

The institutional policy for periodic evaluations must:

a) designate an authority to be in charge of its implementation;

b) provide for the preparation of an institutional manual for periodic evaluations;

c) determine the frequency of evaluations, which must not exceed a ten-year cycle for an institution’s entire range of programmes;

d) provide, in the case of programmes offered through the cooperation of several units or several institutions, that the procedures for periodic evaluations will be determined in the agreement protocols or other relevant documents;

e) determine who will be in charge and what procedure will be followed in order to implement the recommendations set out in the evaluation reports, and to establish an action plan;

f) provide for the dissemination, both internally and externally, of the evaluation results (strengths and weaknesses, major recommendations, etc.).
2 INFORMATION TO BE FORWARDED TO THE PROGRAMME EVALUATION REVIEW COMMISSION

In order for the Commission to carry out its mandate, it must be well informed as to the evolution of periodic evaluation policies and practices and their consequences within the universities. To this end, each institution shall forward to the Commission:

- its institutional policy, together with manuals for periodic evaluations and other tools that might be developed for its implementation; it is understood that the Commission shall be notified as soon as possible as to any update of these documents;
- copy of the text to be used for the publication of the results of completed evaluations.
RELATED DOCUMENTS
# TABLE OF CONTENTS

Introduction ......................................................................................................................................................... 19

1 Approaches to periodic evaluation ................................................................................................................. 21

2 Responsibility for evaluating programmes that are offered through the cooperation of several institutions .................................................................................................................................................... 23

   a) Extension programmes
   b) Programmes offered through association or cooperation between institutions
   c) Joint programmes

3 Accreditation and the periodic evaluation of programmes ................................................................................. 25

4 Procedures for the periodic evaluation of programmes ..................................................................................... 27

   4.1 Self-evaluation ................................................................................................................................................ 27
       a) Cooperation of faculty members and participation of students
       b) Self-evaluation report

   4.2 Opinion of at least two experts in the discipline ............................................................................................ 28
       4.2.1 Selection and mandate of the experts
       4.2.2 Report by the experts

   4.3 Final evaluation report by an institutional committee ................................................................................... 29
       4.3.1 Role of the institutional committee

5 Criteria and tools of evaluation ......................................................................................................................... 31

6 Follow-up on periodic evaluations: decision-making and action plan .............................................................. 33

7 Dissemination of the results ............................................................................................................................... 35

Appendix

Table of analysis .................................................................................................................................................... 39
INTRODUCTION

The purpose of this CREPUQ Policy is to “improve the quality and relevance of academic programmes offered by the universities at all levels and in all academic sectors, with a view to fostering their further development”.

The present companion document aims at informing the authorities who are in charge of periodic evaluations concerning some of the terms of this general policy.
1 APPROACHES TO PERIODIC EVALUATION

The CREPUQ Policy deals essentially with the evaluation of degree programmes but it may be adapted to certificate and diploma programmes as well as to the concurrent evaluation of several related programmes (section 1.1, paragraph 2). However, institutions should clarify their expectations in regard to these types of programmes.

Periodical evaluations may be performed in accordance with either of the two approaches described below, with the understanding that an institution may choose the model that suits its particular conditions, or combine the two approaches, depending on the circumstances. It must, however, provide specific guidelines to ensure that no degree programme is overlooked.

The approach by programme allows for the detailed examination of the appraised programme, of the quality of content and of the integration of courses into a coherent structure that will foster the attainment of its learning objectives. In addition, this model facilitates the examination of the programme’s social and economic relevance, and it is mandatory in cases where several units or institutions are involved in the programme.

In order to simplify the process, the institution opting for this approach may find it useful to evaluate, at the same time, programmes that are part of a learning sequence, programmes in the same discipline, or those which are related in another way.

The approach by teaching and research unit emphasizes the connection between programme evaluation and the management and allotment of resources.

However, institutions adopting this model should ensure that the attention and interest of professors, of those in charge of the self-evaluation and of the external experts will focus on the evaluation of degree programmes as much it does on research activities. In this regard, a guide for the evaluation of programmes, appended to the institutional policy, would further this objective.

In carrying out its mandate, the Commission acknowledges that the implementation of the Policy may sometimes require that the universities adapt the policy’s requirements to their own particular circumstances, as long as they respect the intent and purposes of the Policy.
2 RESPONSIBILITY FOR EVALUATING PROGRAMMES THAT ARE OFFERED THROUGH THE COOPERATION OF SEVERAL INSTITUTIONS

There are three categories of programmes requiring the contribution of several institutions: extension programmes, programmes offered through association or cooperation between institutions, and joint programmes. For each category, responsibility for evaluation should be carried out in accordance with specific procedures, which ought to be clearly explained in the agreement protocols or other relevant documents, as prescribed by paragraph 1.4 d) of the Policy.

a) In the case of extension programmes [programmes offered by one institution at another institution or campus], the home institution will assume responsibility for periodic evaluation, it will entrust the evaluation to its designated authorities, and it will ensure follow-up.

b) In the case of programmes that are offered through association or cooperation, the institution taking on the primary academic responsibility will also be responsible for periodic evaluation, it will entrust the evaluation to its designated authorities, and it will ensure follow-up.

c) In the case of joint programmes, the participating institutions will designate an authority, other than the programme committee, that will be mandated to establish the periodic evaluation timetable, to receive various reports, to appoint the external experts, to select the members of the institutional committee, and to ensure follow-up, in accordance with paragraph 1.4 e) of the Policy.

Whatever the category, in all cases, there is only one programme to be evaluated. The periodic evaluation thus only requires a single expert team and a single institutional committee whose members do not necessarily have the same home institution. In addition, the participation of faculty members and students in the process should be provided for in the agreement protocol.
3 ACCREDITATION AND THE PERIODIC EVALUATION OF PROGRAMMES

As stipulated in the Policy (section 1.1, third paragraph), the reports submitted in the context of seeking the accreditation of a programme by an authority external to the university may be used as part of the periodic evaluation. It is therefore advisable that the operations for the accreditation and those for the periodic evaluation of a professional training programme be performed at about the same time. This simplifies the collection and analysis of data for the basic file; it also makes it possible for the institution to take advantage of the involvement of the professors.

Nevertheless, the objectives of the two operations should not be confused, and all the requirements for periodic evaluation must be met. For example, even though the accreditation process includes a critical analysis of the programme, it is not sufficient to consider the social relevance of a professional training programme during the self-evaluation process; its institutional and inter-university relevance must also be examined, in accordance with paragraph 1.3 i) of the Policy.
4 PROCEDURES FOR THE PERIODIC EVALUATION OF PROGRAMMES

The procedure for periodic evaluation integrates three perspectives: 1) the internal view of the programme as perceived by the professors and students directly involved; 2) the external view of experts who give their opinion on the quality and relevance of the programme, taking into account the development of the field of study and university programmes offered elsewhere; 3) the view of colleagues who give a synthesis of the opinions expressed, and the related comments, and make an overall judgment about the programme.

Section 1.2 of the Policy sets out three distinct stages in the periodic evaluation process. Each of these stages is meant to achieve a precise objective.

4.1 Self-evaluation

Self-evaluation (paragraph 1.2 a) is the cornerstone of the periodic evaluation process; the value of subsequent evaluation activities depends upon it.

By using the results of continuing evaluation and those of the previous periodic evaluation, it is possible to ensure that the programme is evolving in a coherent way, and that this evolution is related to the progress of the discipline.

The institutional policy should specify the self-evaluation objectives and set forth precise guidelines for the composition of the self-evaluation committee, and for the various activities and consultations which the committee will undertake to carry out its mandate.

a) At this stage, the cooperation of the academic staff is essential. It is part of the responsibility of faculty members to examine critically the quality and relevance of the training given to the students, as well as to evaluate the contribution made by regular and part-time faculty members, teaching assistants and instructors towards meeting the programme objectives.

The subsequent implementation of the results of the evaluation will be facilitated if, in addition, the faculty members involved in the programme take part with the programme director in preparing the self-evaluation report and if they are in agreement with its recommendations.

Student participation is equally necessary. To meet this Policy requirement, it is suggested that student representation be ensured on the self-evaluation committee as full-fledged members. Similarly, the contribution of recent graduates may be particularly informative, whether they have now joined the job market or are pursuing further studies.

b) The self-evaluation report should include a description of the programme, its operation since the last evaluation or during the past five or six years, its strengths and weaknesses, the opportunities available and the problems to be overcome in order to ensure its future development. The contents are outlined in the Policy document (section 1.3). The report should also include proposed solutions to the problems that have been identified and set out recommendations or suggest a development plan. No more than six months should be required for the preparation of the self-evaluation report.
4.2 Opinion of at least two experts in the discipline

At the second stage, the opinion of at least two external experts who are specialists in the discipline (paragraph 1.2 b)) must be obtained in order to ensure the legitimacy and objectivity of the periodic evaluation process, as well as its public credibility.

The experts should be university professors who are recognized specialists in the discipline of the programme; it may be advisable to call upon experts from outside Quebec. Researchers who are working for a public or private research organization may also act as experts, as long as the team of experts includes at least one university professor.

In the case of a professional programme, it may be helpful also to solicit the input of those who are in charge of internships and of practitioners from the field in question.

4.2.1 Selection and mandate of the experts

The opinion of these experts should make it possible to position the programme in the regional, national and international context. In order for their contribution to be fruitful, three conditions must be met.

a) The selection of experts must not be controversial, so that the judgments expressed by them can be seen as equitable and without conflict of interest. An expert should be neither a former colleague nor a graduate of the institution; in addition, care should be taken to avoid too close a relationship between the expert and the programme director and the faculty members involved in the programme; the expert’s department should not be in direct competition with the one whose programme is being evaluated.

b) The experts must be given enough information to support their judgment, which means that they should have received in advance the self-evaluation report and any other relevant document, including guidelines setting out the elements of their mandate.

c) The mandate entrusted to the experts must allow them to express their own judgment on the programme, that is, an opinion in which they will identify its strengths and weaknesses, based on the self-evaluation report and on all the information gathered at their visit; they will also recommend whatever actions they believe are likely to improve the programme’s quality and relevance.

4.2.2 Report by the experts

When they have finished gathering the necessary information through meetings with the faculty members and students involved in the programme being evaluated, the administrators, and any other person they may find it advisable to talk with, the experts will draft their report, either jointly or individually, depending on the institutional policy.

The people who were closely involved in the self-evaluation should be sent a copy of the experts’ report and be invited to forward their comments to the programme director.
4.3 Final evaluation report by an institutional committee

At the third stage, a final judgment on the programme is rendered by an institutional committee, based on the evaluation file, in order to ensure the credibility of the process within the institution. Under paragraph 1.2 c) of the Policy, the institutional committee should be composed of faculty members who are not involved in the evaluated programme, and it may also include academic administrators.

Various models can meet this requirement: an ad hoc committee for every evaluation, a committee for each teaching and research unit, or a central committee, responsible for all the periodic evaluations.

The institution is free to select the model that is the most suitable to its particular conditions.

4.3.1 Role of the institutional committee

The duty of the institutional committee is to perform a careful examination of the evaluation file, to prepare a synthesis by reconciling all its elements, and to draft a final evaluation report. In carrying out their mandate, the committee members should take into account the considerations and recommendations contained in the self-evaluation report, the opinions expressed by the external experts - taking advantage of the variety of opinions expressed - and the comments made by those in charge of the programme.
5 CRITERIA AND TOOLS OF EVALUATION

Periodic evaluation must address, as a minimum, the nine (9) criteria listed in the Policy (section 1.3) and specific attention should be paid to each of them.

In addition to treating the criteria concerning the philosophy and organization of the programme [paragraphs 1.3 a) to 1.3 e)] – clarity and validity of the programme objectives, link with the mission and development of the institution, admission criteria, programme structure and relation to the current state of the discipline – it is essential that evaluation committees try to understand how these are applied in practice, related to the teaching and learning services offered to students.

Accordingly, it is especially important to study the teaching strategies, the learning environment of students and the evaluation of learning [paragraph 1.3 f)], taking into account the level (undergraduate or graduate studies), the type of programme (professional or academic) and the system of teaching (on campus or distance education).

At the present time, universities are making greater use of information technologies, especially Internet and Intranet, as means of improving the quality of their programmes and the learning resources available to their students. This means that these strategies should also be examined in the framework of the periodic evaluation of the different programmes.

The information concerning regular faculty members and part-time instructors [paragraph 1.3 g)] should be sufficiently detailed in the self-evaluation report for the experts and the institutional committee to make a judgment about the competence of the academic staff and their areas of specialization in relation to the objectives of the programme. Accordingly, there should be attached to the report the c.v.’s or at least a substantial resumé of the qualifications of the academic staff who make a significant contribution to the programme. For those who make a more limited contribution, a table of qualifications may suffice.

It is equally important to examine the physical and financial resources attached to the programme [paragraph 1.3 h)] to ensure that the objectives of programme development are realistic in relation to the budgetary situation.

In relation to the relevance of the programme [paragraph 1.3 i)], it is important to examine this issue in three aspects: institutional, interuniversity, and social.

For the evaluation of a programme, the use of indicators and of an evaluation guide adapted to the particular circumstances of each institution would facilitate the work of evaluation committees.

However, even though the analysis of quantitative data gathered as part of statistical procedures can be very useful to understand the evolution of the programme, this analysis is not a substitute for the critical judgment of competent and knowledgeable people about the actual quality and relevance of a programme.

If an institution uses survey procedures such as a questionnaire to identify problems and questions for further analysis, it is essential that they be followed up by more qualitative analysis. Focus groups and personal meetings can be very useful in this regard.
6 FOLLOW-UP ON THE PERIODIC EVALUATION: DECISION-MAKING AND ACTION PLAN

Once the evaluation process is completed, the institution should be officially informed of the results through an appropriate procedure [paragraph 1.4 e]). Decisions need to be made on the recommendations of the final evaluation report and the follow-up measures in response to the report.

The purpose of a periodic evaluation is to improve the quality and relevance of the programmes offered by universities. This evaluation may be well done and lead to realistic recommendations, but if there is no follow up, the investment of time and energy may be justified in terms of institutional accountability to the community but the primary objective – the improvement of programmes – will not be attained.

The follow-up of the evaluation thus constitutes a crucial stage in the periodic evaluation process. Each institution should determine whether the follow-up should be entrusted to a statutory authority, such as an academic council or commission, or to a senior administrator, such as a dean or a vice-rector. Those in charge of the programme should be informed as to how their cooperation will be needed in the preparation of the action plan and a timetable for filing the progress report.
7 DISSEMINATION OF THE RESULTS

The periodic evaluation of programmes, among its other functions, is the way in which the university discharges its responsibility to be accountable to both its community and society as a whole.

Each institution is therefore responsible for setting out in its institutional policy the means by which it intends to carry out this responsibility to ensure the dissemination, both internally and externally, of the programme evaluation results — especially strengths and weaknesses and major recommendations — in accordance with paragraph 1.4 f) of the Policy. The Commission hopes, for its part, that public dissemination will be the broadest possible and will take advantage, for example, of university publications and the institution’s web site.

The institution should also ensure that a copy of the text used to disseminate the results of completed evaluations be forwarded to the Programme Evaluation Review Commission (chapter 2 of the Policy, sub-paragraph 2).
TABLE OF ANALYSIS

The following table is a tool which has been used by the Commission, at the start of the second round of its activities, to do a preliminary study of the current documents of each university.

It is made available to those responsible for programme evaluation so that they may use it for their own purposes, if they so desire, and to ensure that the self-evaluation report covers all the criteria of the Evaluation Policy.

<table>
<thead>
<tr>
<th>Procedure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Self-evaluation</td>
</tr>
<tr>
<td>External experts</td>
</tr>
<tr>
<td>Institutional committee</td>
</tr>
<tr>
<td>Responsibility</td>
</tr>
<tr>
<td>Frequency of evaluation</td>
</tr>
<tr>
<td>Accreditation</td>
</tr>
<tr>
<td>Interdisciplinary programmes</td>
</tr>
<tr>
<td>Follow-up</td>
</tr>
<tr>
<td>Dissemination</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>Objectives of the programme</td>
</tr>
<tr>
<td>Mission of the institution</td>
</tr>
<tr>
<td>Admission of students</td>
</tr>
<tr>
<td>Structure of programme</td>
</tr>
<tr>
<td>Relation to Discipline</td>
</tr>
<tr>
<td>Strategies: Teaching</td>
</tr>
<tr>
<td>Evaluation</td>
</tr>
<tr>
<td>Human Resources: Instructors</td>
</tr>
<tr>
<td>Professors</td>
</tr>
<tr>
<td>Physical/Financial Resources</td>
</tr>
<tr>
<td>Relevance: Institutional</td>
</tr>
<tr>
<td>Interuniversity</td>
</tr>
<tr>
<td>Social</td>
</tr>
</tbody>
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<tr>
<th>Tools</th>
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</thead>
<tbody>
<tr>
<td>Indicators</td>
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<tr>
<td>Evaluation Guide</td>
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**Key**

E = Explicit
I = Implicit
X = Not in conformity
A = Absent
? = Question to be clarified
< = Incomplete
II Review Procedure of the Programme Evaluation
Review Commission
INTRODUCTION

The *Policy of Quebec Universities for the Periodic Evaluation of Current Academic Programmes* (hereinafter referred to as “the Policy”) expresses a common intent to ensure that every institution has adopted and implemented an evaluation policy that will meet the requirements of society to ensure the quality and relevance of higher education.

In order to enhance the credibility of this Policy, the universities established the Programme Evaluation Review Commission, entrusting it with a mandate “to examine the appropriateness of institutional policies and practices with respect to the goal, stages, criteria and procedures defined under the terms of the Policy.”

In carrying out its mandate, the Commission is fully autonomous; the recommendations it makes are addressed to the institutions concerned and are not subject to the approval of any committee of CREPUQ.

For each institution, this review procedure involves two aspects: to examine the current policy of the institution, and to determine, within the framework of its structure, whether the institution’s evaluation practices are in accordance with the Policy.

Since the beginning of its activities in 1991, the Commission has considered its role to be in the context of fostering dialogue and its second review cycle was launched as a logical continuation of this perspective.

The Commission will study the policies of each institution in order to get an up-to-date and complete picture for its guidance in the coming years. After, the Commission will forward to each institution any comment that might be useful.
1 EXAMINATION AS TO WHETHER THE INSTITUTIONAL POLICY IS IMPLEMENTED IN ACCORDANCE WITH THE CREPUQ POLICY

1.1 Objective

The objective is to verify the appropriateness of the institutional policy and the periodic evaluation practices with respect to the goal, stages, criteria and procedures defined under the terms of the Policy.

1.2 Procedure

The Commission will establish its calendar for the review operations in consultation with the universities. It will ask every university to forward, in due course, a list of the evaluations already completed and of those in progress.

In cooperation with the institution concerned, the Commission will identify two or three programmes which have been evaluated over the past three years, making sure the selected programmes are representative of the range of programmes offered by the institution.

The Commission will then ask that the institution forward the complete evaluation files of the selected programmes, together with the institutional policy, should the latter have been modified since the previous evaluation was completed. For its part, the Commission is committed to preserving the confidentiality of any documentation identified as being confidential.

The evaluation documents should include the self-evaluation report, the reports from the external experts, the report from the institutional evaluation committee, the comments of those in charge of the programme, the action plan, and, in the case of professional training programmes, the report issued by an external accreditation authority.

Through the analysis of the institutional policy and of the evaluation files thus provided, it is possible for the Commission:

- to examine the consistency of the institutional policy and of periodic evaluation practices with the CREPUQ Policy;
- to identify the need for additional information.

Through a visit to the institution, it is then possible for the Commission:

- to acquire a better understanding of the implementation practices of the periodic evaluation process;
- to complete its overall examination of how the institutional policy is implemented.

In a positive context of exchange and dialogue, the Commission will then meet with some of the senior administrators and those in charge of implementing the evaluation process, as well as with faculty members and students. The timetable, agenda and duration of these meetings will be determined in a flexible way, in consultation with the institution. The visit will usually be completed in a single day.
1.3 The evaluation review report

After examining whether the periodic evaluation practices are in conformity with the institutional policy, the Commission will prepare a draft report setting out its observations in order to assist the institution in improving its periodic evaluation process; the draft report will also include the Commission’s conclusions and recommendations.

A copy of the draft report will be forwarded to the institution, which may express any comments that it may deem appropriate to be submitted to the Commission, the latter being free to use them as it chooses.

The Commission will then draft its final report for the benefit of the institution to whom it is addressed. Should the institution find it necessary to add some observation to the report, this statement may be attached to the published document as an appendix.

1.4 Dissemination

The final report will be filed with the Board of Directors and the Academic Affairs Committee of CREPUQ, then forwarded to the Ministry of Education.

The Commission’s report will then be accessible on CREPUQ’s website (www.crepuq.qc.ca). Relevant information will also be included in the synthesis report of the Commission reflecting the current state of periodic evaluations in the Quebec universities.

1.5 Implementation of the recommendations

Within the year after publication of the final report, the institution will inform the Commission as to what actions were taken to comply with the Commission’s recommendations. It will also mention what modifications, if any, in the wording of its institutional policy and in its practices may have been adopted as a result.
2 OUTLINE OF REVIEW OPERATIONS

1. Compilation of a complete evaluation file, including the current institutional policy and the evaluation files for two or three programmes that were selected in consultation with the institution.

2. Analysis of the documentation and request for any additional information, if necessary.

3. Visit to the institution.

4. Preparation of the draft report.

5. Forwarding of the draft report to the institution for its comments.

6. Preparation of the final report.

7. Forwarding of the final report to the institution.

8. Remarks from the institution to be added as an appendix to the report, if necessary.

9. Dissemination of the final report: a copy to the concerned authorities, and posting on CREPUQ’s web site.

10. Follow-up on the implementation of the Commission’s recommendations, within the year after publication of its final report.