

**Council for Higher Education in Israel**

**Survey Report and Team Findings  
Guide**

**2023**

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## Overview

This document contains the instructions for Survey Teams to use when preparing CHE Survey Reports and Survey Team Review Findings for QA/Compliance with Standards Surveys. This document is the companion to the *Survey Report Template*, which provides the framework for the Survey Report. For information about the roles of team members, the survey visit, and the logistics of planning for and conducting the visit, review the *Guidelines for the Planning and Conduct of QA/Compliance Survey Visits* on the CHE website..

Survey Teams do not review or make judgments about compliance with the 11 Standards. That judgment is the responsibility of the CHE after its review of the Survey Report and Survey Team findings.

## Definitions for Judging a Program's Performance in Elements

A **finding** results when the program's performance in an element is determined to be *satisfactory with a need for monitoring* or *unsatisfactory*.

For **limited** survey visits, a **finding** results when the program's performance in an element is determined to be *satisfactory*, *satisfactory with a need for monitoring*, or *unsatisfactory*.

The following definitions are to be used in judging a program's performance:

### ***Satisfactory***

The policy, process, resource, or system required by the Element is in place and, if required, there is sufficient evidence that it is effective.

### ***Satisfactory with a Need for Monitoring***

1. The policy, process, resource, or system required by the Element exists but there is insufficient evidence of effectiveness; OR
2. The requirements of the Element currently are met but anticipated circumstances could negatively impact performance.

### ***Unsatisfactory***

One or more requirements of the element is/are not met. Required policy, process, resource, system not in place or ineffective. Formal evidence of effectiveness/sustainability is absent.

For **preliminary** survey visits, a **finding** results when the program's performance in an Element is determined to be *unsatisfactory*.

The following definitions are to be used when judging a program's performance in Elements for **preliminary survey visits**. There is no *satisfactory with a need for monitoring* option for preliminary surveys.

### ***Satisfactory***

The required policy, process, resource, or system is in place or sufficiently developed at this stage of the program's development. If required by the element, there are plans to complete implementation and to collect evidence of effectiveness.

### ***Unsatisfactory***

The medical education program has not met one or more of the requirements of the Element based on what should be in place at this stage of the program's development. These findings

represent the team’s best judgment that the program has not made sufficient progress toward satisfactory performance given the current status of planning and program implementation.

## **Steps in the Preparation and Review of the Survey Report and Survey Team Findings**

The following steps describe the process for the development of the Survey Report and Survey Team findings. There are some differences in the process for limited visits which are noted. The templates for the Survey Report and Review Findings, are available on the CHE website.

### **Survey Team Members Receive the Survey Package or Briefing Book**

Before the survey visit, each Survey Team member will receive an email from CHE QA Division (QAD) with instructions for accessing the survey package submitted by the school.

The survey package consists of a Institutional Self Assessment (including DCI), an appendix of supporting documents, an institutional self-study summary report, the Student Survey Report.

### **Survey Team Secretary Makes Survey Team Member Assignments**

Shortly after the Survey Team receives the school’s survey package, the Survey Team Secretary assigns the Survey Team members Standards/Elements as their specific areas of responsibility. Each Survey Team member will be responsible for leading the discussion of the assigned areas during the Survey Visit and drafting those sections of the Survey Report.

Once Survey Team members have received specific assignments from the team secretary, they will review their sections of the survey package to determine if there are gaps in information. If so, Survey Team members will notify the Survey Team secretary who will coordinate the request for information with the school’s Faculty Lead (FL).

### **Survey Team Members Receive Data/Information Updates from the School**

All requests from the Survey Team are coordinated through the Survey Team Secretary to the FL. Updates must be provided to the Survey Team Secretary electronically. The Survey Team Secretary will forward these updates to the Survey Team members.

The Survey Team may not accept additional information after the visit concludes, even if the information (e.g., the policy) existed but was not provided at the time of the survey visit.

### **Survey Team Develops a Set of Findings**

As the Survey Team reviews the survey package prior to the survey visit, team members might identify areas that will become findings. During the initial team meeting, the list of potential findings is discussed and additional information that might support or clarify each finding is identified. Team members with responsibility for these areas should develop relevant questions for their discussions with school representatives to clarify or collect the needed information.

During the survey visit, Survey Team members work to finalize a set of findings. The findings should be concise, sufficiently clear and detailed so that the reader understands the scope of the issue being cited. There must be sufficient information available to include in the survey report to justify each finding. Relevant description and data should be included in the finding. For example:

INSUFFICIENT DETAIL:      Many medical students do not receive their grades on time.

**APPROPRIATE DETAIL:** In the internal medicine, obstetrics-gynecology, and surgery clerkships, at least 25% of students did not receive their final grades within six weeks during each of the previous two academic years.

**APPROPRIATE DETAIL:** In total, there are eight faculty in basic science disciplines, with no representation of faculty in physiology, pathology, pharmacology, and genetics. Some of the first-year courses are not fully staffed and plans for faculty recruitment to fill existing gaps have not been finalized. A recruitment timetable does not exist.

### **Survey Team Chair Reports the Survey Team Findings to Institutional Leadership**

The purpose of the exit report is for the Survey Team to provide its findings to the medical school dean. The dean is provided with a copy of the exit report within one month of the conclusion of the visit..

### **Survey Team Members Complete Their Sections of the Draft Survey Report**

During and after the Survey Visit, the members of the Survey Team complete their specific writing assignments within the *Survey Report Template*. Consult the Glossary for correct terminology. Survey Team members develop draft writeups for their respective areas of responsibility prior to the survey visit. Doing so allows the team member to identify any gaps or areas needing clarification in the Survey Report. Other requirements for survey report development include:

- Consult the Survey Team findings to ensure that the reasons for citations of Elements are clearly explained and evidenced by appropriate data/descriptions in the survey report narrative and, as relevant, the accompanying appendix documents.
- Complete the tables requested in the survey report template.
- Summarize detailed narrative from the ISA rather than inserting the ISA text verbatim.

### **Survey Team Secretary Assembles the Draft Survey Report and Prepares the Survey Team Findings**

#### **Draft Survey Report**

Survey Team members will send their written sections of the Survey Report to the Survey Team Secretary by email. This should be done by inserting their sections into the *Survey Report* for the appropriate visit type. The Survey Team secretary will assemble the complete Survey Team Report by inserting and editing, where appropriate, each Survey Team member's contribution into a single survey report template. Where applicable, the Survey Team secretary will also review and complete other required sections of the survey report.

The Survey Team secretary will review the complete draft survey report carefully to ensure that there are no gaps or inconsistencies across sections, that all sections include sufficient detail, that there is sufficient narrative and evidence to support all findings, and that all tables have been completed with the most recent information, as relevant. The Team Secretary is also responsible for collecting the documents for and finalizing the Appendix. The Survey Team Secretary will also edit the entire survey report and Review Findings for clarity and consistency.

#### **Survey Team Findings**

The Review Findings are prepared by the Survey Team Secretary using the Review Findings Template.

### **The Survey Report Appendix**

Appendix documents should be listed sequentially, and the final list of Appendix documents included in the Appendix table of contents. Be sure to include page numbers for the Appendix and number the pages of the Appendix. When preparing the Appendix, do not include hyperlinks to documents. If a reference to a website is necessary, create an appendix document as PDFs of the webpages and/or screenshots.

## **Review and Submission of the Survey Report and Survey Team Findings**

### **Secretariat Review**

- Team secretary sends the draft survey report and draft Review Findings to QAD.
- QAD reviews the Survey Report to ensure the report is complete, sufficient information has been included related to each element, that the findings are clear and well-documented in the Survey Report, and that the findings reflect current CHE expectations about performance for Elements.
- The draft Survey Report and draft Review Findings with suggested edits and comments is returned via email to the Team Secretary.

### **Dean Review**

- Team Secretary emails the Dean a clean copy of the revised Survey Report narrative, the report appendix, and Review Findings with instructions for the Dean to respond via email within one month to:
  - identify errors of fact and provide corrections to the Survey Report
  - note concerns about the process of the survey visit.
 The Dean may not provide comments on the team findings.

### **Team Secretary and Chair Review of Dean's Response**

- Team Secretary considers edits and comments from the Dean, along with the evidence provided to support edits to the survey report.
- Team Secretary discusses any of the Dean's requested edits that might lead to changes in the Review Findings with the team chair.
- Team secretary revises the Survey Report and/or Review Findings based on the comments from the Dean and input from the team chair.

### **Final Submission**

- Team Secretary provides clean copies of the following materials to the QAD
  - Final Survey Report narrative
  - Final Survey Report appendix
  - Final Review Findings
  - Copy of all communications to/from the Dean regarding changes to the Survey Report and/or the Review Findings

### **Survey Team Members Destroys Survey Visit Files**

- Team secretary emails the Survey Team to confirm when the final materials were submitted to the QAD staff and instructs team members to confidentially destroy any remaining materials from the Survey Visit (electronic or paper files and USB drive). The Team Secretary should retain all documents until after QAD action on the report/findings has been made.

**Before submitting the draft Survey Report to QAD, the Team Secretary must:**

- Carefully proofread the Survey Report to correct spelling, typographical, grammatical, and punctuation errors.
- Ensure that all questions are answered and appendices referenced in the table of contents.
- Ensure that all tables are complete and include the most current data.
- Ensure there is consistency between the Review Findings and the Survey Report.

**Before submitting the final Survey Report to the QAD, the Survey Team Secretary must insert their electronic signature on the cover memo.**