



Pre-Review Conference Agenda Template

Chair Responsibilities Prior to Conference Call:

Send review team members an email with:

- Document attachments: 1) MyQM instructions; 2) Peer Reviewer Roles and Responsibilities; 3) Underlying Principles of QM ; 4) Team Calendar; 5) Pre-Review Conference Agenda Template; 6) Writing Effective Recommendations
- Instructions about Pre-Meeting Responsibilities. Reviewers to be told to log on to MyQM to review Course Worksheet **prior to the conference call**, log into course and ensure no immediate navigation difficulties, review the team calendar, prepare a list of questions for the instructor
- Conference call information: Day, Time (incl. time zone), Phone number, and call-in instructions.

Topics for Discussion During Call:

Agenda Item	Points of Discussion	Time	Desired Outcome
Introductions	Roles (including SME) and responsibilities. Make clear your role as Chair and what they can expect from you.		
Communication	Contact information, protocol to follow (all questions to the Course Representative go through the chair), time zone awareness, availability		
Overview of the Review Process	Describe process; discuss Team Calendar and scheduling issues, expectations of time commitments (8-10 hours including the conference call on average), review outcome notification, amendment time frames, etc.		
Access and Navigation Issues	CMS/LMS questions and concerns, any particular issues about access (e.g. password protected areas, time limits for access, etc).		
Course Worksheet	Team checks key areas of the worksheet prior to the pre-review conference call (Are there measurable course level objectives?) Faculty provides overview, reviewers ask questions determined by review of the Course Worksheet prior to the call		

Course Editing	What kinds of changes may be made to the course during the review? How should they be communicated to review team?		
Confidentiality and Intellectual Property	Discuss confidentiality expectations, intellectual property issues, no alterations by reviewers, etc.		
*****	(Course Representative can opt out of rest of call)	***	*****
Scoring and Feedback	Use of annotations, 85% metric, consensus unnecessary, flexibility in how standards are met, essential standards, SME issues, QM principles, recommendation expectations (5 keys to Writing Effective Recommendations), advocate for student (student perspective)		
Reviewing Tips	Start soon, use momentum to efficiently review, expectations for time spent on review, email chair when finished, reminder that some institutions will track reviewer access in a course. QM expects the reviewers to do a thorough job and supply useful recommendations following proper protocol.		
CRMS Tool	Save work often. Reviewer worksheets can be saved and submitted if complete. Edits can be made and submitted again up until the final report submission.		
Other Questions & Concerns	Solicit questions from team		
Wrap Up	Reminder of start dates and end dates		

Post-Conference Call Email

- Send finalized calendar, summary of key points from discussion, and reminder to start as soon as possible. Copy reviewers, Course Representative, and organization’s QM Coordinator.