



The University of Edinburgh

# **Internal Periodic Review Handbook**

This handbook provides information for Schools/Subject Areas preparing for an Internal Periodic Review (IPR) and for IPR Review Team Members reviewing a School.

Additional guidance and templates for preparing for review, report writing and external nominations are available on the [IPR Information SharePoint](#) site.

Internal Review Support can arrange tailored briefings on request for Schools and review team members.

Information and advice is available at any time from Internal Review Support.

Academic Services reviews the IPR process at the end of each review cycle.

Throughout this document, "School" refers to the School, Deanery, Subject Area or College under review.

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## 1. What is an IPR?

The University's Internal Periodic Review (IPR) process forms part of the Scottish Quality Enhancement Framework. The emphasis of the Quality Enhancement Framework is on universities' ability to maintain standards and to assure and enhance the student learning experience. Internal Periodic Review is one of the elements of the Framework and the Scottish Funding Council (SFC) requires the University to carry out internal reviews of all undergraduate, postgraduate taught and postgraduate research provision on a six yearly basis. Internal Review Support will liaise with Schools and Colleges to define the scope of reviews. Increasingly, reviews are moving away from single programme or subject area reviews to School-wide reviews; for example Schools may choose for a single review to cover all of its undergraduate provision, or all postgraduate taught provision, or all postgraduate research provision, or a combination of these as appropriate.

The IPR process itself is not prescribed and we have flexibility in the way in which we conduct our internal reviews. Internal Review Support works with Schools to tailor their reviews, within the parameters of the University standard remit and SFC requirements, so the School can gain maximum benefit from the process. A key part of this will be the subject-specific, or School-specific, remit items. These are proposed by the School and typically focus on two key areas the School would like to explore. The IPR process provides external input and also dedicated space for colleagues to discuss and think about specific topics; for example areas the School wants to develop or challenges they are facing. The IPR also provides an opportunity to amplify the School's voice to College or University management. In conducting reviews, we use a variety for mechanisms, including but not limited to, supporting documentary evidence, digital and in-person meetings.

The student voice is a key element of internal review and IPRs will focus on students' experience of the academic and support provision within their programme and School. It is expected that students will be involved in the School's preparations for the review, identifying the School or subject-specific remit items and meetings with the internal review team.

### 1.1 The University's Internal Review framework

This handbook sets out the University framework for reviews of undergraduate, taught postgraduate and research provision. The format of reviews will vary according to the level of provision, but all share the following common features:

- [University standard remit](#)
- School or subject-specific remit items (proposed by the School)
- Student engagement with all stages of the review
- Remit meeting convened by the Deputy Vice-Principal Students (Enhancement)
- Reflective Report written by the School
- Core supporting documentation
- Final preparation meeting for the review team
- Review visit to the School by the review team
- Outcome report by the review team including commendations highlighting good practice and recommendations for action
- 14-week and one year on response reports (prepared by the School)

- Annual report on progress with recommendations in the School annual quality report

## 1.2 Roles

### School

There is a significant time commitment involved with preparing for an IPR and Schools are encouraged to consider this when appointing their Academic Lead and School administrator for the review. Sufficient time should be allocated to and protected for these roles to support the process. The Academic Lead and School administrator roles are key contacts for the IPR but it is anticipated that other colleagues within the School will be involved with preparations.

- **Academic Lead**  
Key liaison point between Internal Review Support and the School. Responsible for co-ordinating production of the Reflective Report. Convenes the Review Information meeting and attends the remit meeting and some of the meetings during review visit. Key liaison point between the review team and the School during the review visit. (See section 3.6)
- **School administrator for the review**  
Provides support to the Academic Lead and liaises with Internal Review Support. Responsible for practical arrangements for the review visit, for example room and catering booking.

### Review Team

During preparations for the review, review team members should direct any queries about the content of the review to the review team administrator. Review team members do not make individual contact relating to the Internal Periodic Review with staff or students of the provision being reviewed.

- **Review team Convener**  
Participates in all preparatory and review visit meetings. The Convener guides the review team through the visit, ensuring that all aspects of the subject-specific and standard remits are given proper consideration, and that all team members have an opportunity to raise issues with the review team. Therefore, they should be experienced in chairing meetings. The Convener is not required to chair every meeting of the review visit; the review team will discuss chairing arrangements at the final preparation meeting. There is no need for the Convener to have any specific existing knowledge of the area under review, but a good knowledge of University structure, policies and procedure, and of current University priorities is essential. The Convener should be available to engage with and advise on issues raised by the review team administrator in preparation for the review.
- **Review team Internal member**  
Participates in all preparatory and review visit meetings and will be invited to chair one or more of the review visit meetings. The role is a critical friend with knowledge of current priorities for the University. There is no need for the Internal member to have any specific existing knowledge of the area under review, but they will bring to the review their knowledge of University structures, policies and procedures.
- **Review team External member**  
There are normally two external members and they will be invited to all preparatory meetings and attend if possible. External members participate in all review visit meetings and will be invited to chair one or more review visit meeting. The role is a critical friend with specialist knowledge of the discipline under review. At least one external member should be an academic from within the discipline being reviewed. Where appropriate, the other external member may be drawn from a professional, statutory and regulatory body (PSRB) or from industry.
- **Review team Student member**

Participates in preparatory meetings and all review visit meetings and will be invited to chair one or more of the review visit meetings. Student members will be from a different discipline or School within the University. The role is crucial to ensuring the student perspective in review meetings, although they are not expected to comment solely from the student viewpoint.

- **Review team administrator**

Participates in all preparatory meetings and all review visit meetings. Prepares the agenda for the remit meeting, collates and circulates papers and takes the formal note of the remit meeting. Liaises with the School in preparing the review visit schedule. Supports the review Convener in preparation for the review, ensuring the review visit meetings run smoothly and takes notes of all review visit meetings. Responsible for drafting the final report and obtaining comments on the draft from review team members and factual corrections from the School.

- **Internal Review Support Co-ordinator**

Each review will have a named contact within the IRS team who will be available to offer support and guidance to the School and review team throughout the process.

## 2. Summary of the stages of the review process

<b>Early Preparations</b>	
Semester 1 of the session preceding the review	Agreement of Semester for review visit – initiated by Internal Review Support with School; early discussion about preparation for review, including agreeing scope of review, School to identify Academic Lead
Semester 2 of the session preceding the review	Internal review team membership confirmed by Internal Review Support
Semester 2 of the session preceding the review	Head of School nominates two potential external reviewers to Internal Review Support Internal Review Support seeks approval Deputy Vice-Principal Students (Enhancement)
Semester 2 of the session preceding the review	Once approved, Internal Review Support formally invites external reviewers to participate in review
Semester 2 of the session preceding the review	Internal Review Support liaises with review team members to agree date for review visit
Once review date is agreed	School publicises the review to staff and to students, for example Student Staff Liaison Committee (SSLC) meetings, subject-based student societies, School intranet, online learning platforms.
Once review date is agreed	<b>Review information meeting</b> arranged by Internal Review Support in consultation with School (see section 5.2)
<b>The Remit Meeting</b>	
Once date of review agreed	School to consider items for the subject specific remit including items from students
Once date of review agreed	Internal Review Support arranges the Remit Meeting date in consultation with School
4 months prior to review	Remit meeting convened by the Deputy Vice-Principal Students (Enhancement)

<b>Review Visit Preparations</b>	
Following remit meeting	Head of School or nominee starts to prepare Reflective Report. The Academic Lead and School administrator start to collate supporting documentation for the review (see document list)
Following remit meeting	Draft schedule prepared for review visit. Review team administrator leads in consultation with Convener, Academic Lead and School administrator for the review
6 weeks prior to review visit	School submits final Reflective Report and supporting documentation to Internal Review Support. Internal Review Support makes Reflective Report and supporting documentation available to the review team
3 weeks prior to review visit	Review team members submit questions to review team administrator for inclusion in review visit briefing notes
Approximately 2 weeks prior to review visit	Final Preparation Meeting for review team members – to confirm the main themes for the review visit and to agree chairing for each meeting.
Approximately one week prior to review visit	Following Final Preparation meeting, review team administrator finalises the schedule, briefing notes and circulates to review team. Finalised schedule circulated to Academic Lead and School administrator for the review
<b>Review Visit – normally two full days on campus, plus digital feedback meetings on the third morning</b>	
	All review team members attend and participate in all review visit and digital feedback meetings.
<b>Review Report and Follow-on</b>	
2 weeks after review visit	Review team administrator sends draft report to Convener and Internal Review Support for initial comment and amendment
3 weeks after review visit	Review team administrator sends draft report to review team members for comment and amendment
6 weeks after review visit	Review team administrator sends draft report to Academic Lead and School administrator for the review for correction of factual errors
8 weeks after review visit	The School returns any factual errors in the draft report to the review team administrator. The Academic Lead is responsible for ensuring complete sign off by the School is agreed before returning the draft report to the review team administrator.
10 weeks after review visit	Review team administrator incorporates any factual corrections to the report and circulates the final version to the review team and Internal Review Support. Internal Review Support submits final report submitted to Senate Quality Assurance Committee for approval. Following approval by the committee the report is published on the Academic Services website  Final report circulated as appropriate by Internal Review Support
Following receipt of final report	Head of School starts to prepare response to the recommendations
14 weeks after School receives final report	School provides 14-week response to Internal Review Support for submission to Senate Quality Assurance Committee. Following submission to the committee the response is published on Academic Services website
1 year after receipt of final report	School makes year-on response to Internal Review Support for submission to Senate Quality Assurance Committee. Following submission to the committee the response is published on Academic Services website.  Thereafter annual reporting on progress towards meeting recommendations is made through the School annual programme monitoring report



### **3. Early preparations**

#### **3.1 Agreement of semester for review visit**

In semester 1 of the academic year prior to the scheduled review, the Deputy Vice-Principal Students (Enhancement) will contact the Head of School to request their preference for the review timing. While preferences cannot be guaranteed, we make every effort to accommodate Schools' preferred timing for their reviews.

#### **3.2 Early preparation steps**

- School to consider how to involve students in preparing for the review
- Head of School appoints Academic Lead and School administrator for the review. It is essential that the appropriate person is appointed and that time is safeguarded to fulfil role requirements. Some Schools appoint an academic member of staff as the lead with a member of professional staff supporting the role
- Consider external review team membership
- Consider School or subject-specific remit items – these will be the focus of the review and Schools should involve students in identifying them
- Schools should consider any forthcoming accreditation visits which might align with the review, and any specific professional, statutory and regulatory body (PSRB) review requirements which should be taken account of in the University's review

Internal Review Support will arrange a briefing session for School colleagues who will be involved in preparing for the review. We can also arrange additional early preparation sessions by request from Schools. The Deputy Vice-Principal Students (Enhancement) attends the briefing and the sessions are intended to provide an introduction to the process, how to approach preparing the Reflective Report and to discuss the scope of the review.

Internal reviews can be scheduled to take place in either semester 1 or semester 2 of the academic year. Internal Review Support recommends that the review should not coincide with exam diets or times when staff and students are less likely to be available to participate (such as holiday periods).

#### **3.3 Review format**

The review format will depend upon the provision being reviewed. Internal Review Support will work with Schools to tailor the review format to suit the provision and to help the School gain the most benefit from its review. Although in person meetings offer the best opportunity for involvement of certain groups, it is also possible to include digital elements and gather information before, or after the review visit itself. The review visit, where the review team meets with staff and students from the School, normally runs over two consecutive days, with feedback meetings taking place digitally on the morning following the review visit. This works well for in person reviews and particularly for external review team members who need to manage their time in coming to Edinburgh.

However, the format can be negotiated through consultation between the School, Review Team Convener and Internal Review Support. For example if all undergraduate, postgraduate taught and postgraduate research provision is being covered in a review there may be a need for additional time or certain sessions may take place virtually. Conversely, if the School can align their review with an accreditation visit, less time may be needed for the internal review.

### 3.4 Timing of reviews

General	<p>Semester 1 reviews are normally held from October to December, and semester 2 reviews from January to March Avoid Flexible Learning Week (week 6 of Semester 2)</p> <p>Avoid assessments periods because students are not available to meet with the review team</p> <p>Ensure that Head of School availability is confirmed before securing the review date</p>
Professional, Statutory and Regulatory Bodies (PSRBs)	<p>Schools should consider timing of next accreditation visit and whether there is scope for scheduling it and the review together to maximise use of core documentation.</p> <p>Options to consider:</p> <ol style="list-style-type: none"><li>1. Alignment of review schedules</li><li>2. Reduced internal review</li><li>3. Involvement of PSRB members in review panels.</li></ol> <p>Schools are invited to discuss with Internal Review Support ways of avoiding unnecessary duplication of effort and options for achieving greater alignment between internal and external review processes.</p>

### 3.5 Agreeing review visit dates

Internal Review Support liaises with the Academic Lead and the review team to agree a date for the review. Internal Review Support will confirm the date of the review to the School and the review team.

### 3.6 The Academic Lead role

The Head of School should identify a member of staff to act as Academic Lead. It is essential that the appropriate person is appointed and that time is safeguarded to fulfil role requirements. **We recommend that a member of professional services staff is also appointed to support the Academic Lead (referred to in this handbook as the School administrator for the review).** Internal Review Support provides guidance for these roles throughout the review process.

**Key features of role** *(supported by School administrator for the review)*

Streamlines communication and organisation of the review

Coordinates student engagement and involvement with preparations for the review, review visit and follow on activity

Ensures that staff and students within the School are informed about the review to gain maximum engagement and benefit for the School

Single point of contact within the School for all issues concerning preparations for the review

Coordinates the overall management of the arrangements and planning for the review within the School, in conjunction with the review team administrator

Leads the review information meeting

Coordinates the School's input to the remit meeting, including identification of the School-specific remit themes

Liaises with the review team administrator and Convener on the review visit schedule

Responsible for coordinating and supplying the supporting documentation for the review to Internal Review Support

Consults within the School with colleagues as appropriate to provide correction of any factual errors in the final report. Responsible for ensuring that a complete sign off is agreed before returning to review team administrator

Responsible for returning the 14 week and year on reports on progress with review recommendations

### **3.7 Appointing the Review team**

The review team comprises:

- A Convener (internal to the University)
- An internal member (internal to the University)
- Two external members (from out with the University)
- A student member
- A review team administrator

Internal Review Support allocates the Convener, internal and student members and the review team administrator. Schools are welcome to suggest internal review team members but we cannot guarantee specific colleagues' availability. The Deputy Vice-Principal Students (Enhancement) approves the review team membership. The Head of School is responsible for nominating external team members for approval by the Deputy Vice-Principal Students (Enhancement).

#### **Convener/internal member**

Conveners and internal review team members are drawn from a list maintained by Internal Review Support. Heads of School are invited to review this list annually to confirm members of academic staff that can be included in the pool of Internal Review team members. Participating in a review team provides valuable insight into how the review process operates and will help the School prepare for their own review. Heads of School are asked to consider this when nominating potential internal review team members. All internal members of the review team are drawn from out with the School under review. The aim is to have teams representing a spread across the Colleges.

#### **External members**

The Head of School proposes two potential external team members for approval by the Deputy Vice-Principal Students (Enhancement). External team members are appointed in the same context as External Examiners in accordance with the University of Edinburgh [External Examiners for Taught Programmes Policy](#) (see 3.8). The University will pay external review team members a fee for participating in the review, on receipt of comments on the final report.

#### **Student member**

The student member is selected after a formal recruitment process by the Students' Association and Academic Services. The Students' Association and Academic Services also provide training for the role and on the review process. Internal Review Support allocates student members to a review of a different School or discipline to their home School. The University will pay student review team members a fee for participating in the review, on receipt of comments on the final report. (It is important to note that students cannot claim for expenses associated with participation on a review team.)

## Review team administrator

The review team administrator is usually appointed by Internal Review Support from within Academic Services, or through a nomination by a College. We welcome expressions of interest in this role from across the University community.

### 3.8 Nominating external team members

The Head of School completes an External Nomination form for each proposed external reviewer. Supporting information must be provided for each person in relation to their suitability for the role, as well as current and previous associations with the University. External team members are appointed in the same context as External Examiners, and Schools should refer to the [UK Quality Code, Advice and Guidance: External Expertise](#).

Nomination forms, information for potential external examiners and additional guidance are available on the [IPR Information SharePoint External Nominations](#) section.

Please note that while the School should make informal enquiries with the external members, nominations must be approved before a formal invitation is offered by Internal Review Support.

#### Appointment criteria

External members	At least one external member should be an academic from within the discipline being reviewed
	Both do not need to be academics and they do not both need to be very senior. It may be most appropriate in some reviews for the second external member to be from a PSRB or from industry
	Should normally be from a UK institution, relevant professional body or industry

#### Conflicts of interest

External members will not normally be appointed if	They have been members of staff or students at the University, in the five years prior to the review or while the review is in process
	They have been External Examiners for the University, in the five years prior to the review or while the review is in process. (However, this does not normally apply to External Examiners of doctoral theses.)
	They are significantly involved in recent or current substantive collaborative research activities with a member of staff closely involved in the delivery, management or assessment of the programme or courses in question

#### Fees and expenses: External review team members only

Academic Services will meet fees and expenses for two external review team members. This includes travel costs and subsistence expenses in line with the University's Sustainable Travel and Expenses policies. Internal Review Support makes overnight accommodation arrangements for the external members of the review team. This will normally be for the night before the review and the night of the first day.

Exceptionally, with the agreement of the Deputy Vice-Principal Students (Enhancement) and the Head of School, the external membership may be expanded and/or drawn from outside the UK. However, it will be important in the case of nominations from outside the UK for the external member to have an understanding of the Scottish and/or UK Higher Education system. **Additional costs incurred for a third or international external member, including international travel and any visa requirements, must be met by the School.**

## 4. Student Engagement

It is essential that the School makes its students aware of the review, involves them in discussion of items for the subject-specific remit and consults with them on developing the Reflective Report as a minimum.

### 4.1 Information on student involvement

Internal Review Support provides information to help Schools explain the purpose of the review to students and to engage them in the process. These documents can be used to publicise to students what the review does, how they can contribute, and how they can continue to be engaged as recommendations are taken forward and progress reported on through annual quality assurance processes.

- [Information for Schools on Student Involvement in an IPR](#)
- [Information for Students on Programmes Under Review](#)

### 4.2 Student engagement with subject-specific remit and Reflective Report

The Scottish Funding Council requires internal subject reviews to gather specific evidence from students on their views of provision and their learning experience as part of the evidence base for reviews. Schools should gather feedback from students in whatever way is most appropriate and consider how best to obtain student input to their subject-specific remit and Reflective Report. Existing channels should be used as much as possible to minimise additional workload, for example, this may be the Student Staff Liaison Committee meeting (SSLC) or School Town Hall meeting. (If consultation is through SSLCs this should be noted in the minutes.)

Schools should invite students to suggest items for the subject-specific remit before the remit meeting. A Student Representative from the School can be invited to attend the remit meeting to speak to the student remit items.

To reach the wider student body, Schools should consider reinforcing communications on the review by other means, for example through the VLE. Schools should reflect the wider student body views where these are likely to be significant, for example part-time, full-time, entrants from secondary education, entrants from further education and online learners (OL). Where possible, graduates' views on the relevance of provision for their careers should be included.

Where a Semester 1 review is scheduled before the first meeting of the SSLC, Schools can consider publicising the review early in the semester followed by a meeting with student representatives and other interested students to gather input to the review. Internal Review Support staff can participate in these meetings, by arrangement, to answer questions on and provide additional information about the review process.

The review team will consider feedback from students alongside other student feedback mechanisms such as the National Student Survey (NSS), Postgraduate Taught Experience Survey (PTES) and Postgraduate Research Experience Survey (PRES). This information will be included as part of the review documentation and Schools should reflect upon it in their Reflective Report.

The School will be asked to comment on how they have engaged students in the preparation of the Reflective Report. Therefore, all mechanisms used to gain evidence and feedback from students should be recorded in the Reflective Report.

### 4.3 Student engagement during the review

During the review visit, the review team meets with a sample of students. Staff from the School are not present during the student meetings, and no comments will be attributed to any individual students. For on-campus students these meetings are normally held over lunch.

Reviews that include OL programmes will offer the same opportunities to OL students to contribute and participate as students on-campus. Internal Review Support, the School and the review team administrator will liaise to ensure appropriate mechanisms are in place to include OL students in the review. Consideration should be given at the earliest opportunity when drafting the review schedule to ensure that, where digital meetings are being used, these can be arranged well in advance.

The timing of meetings needs to take into account the availability of OL students who may have work commitments and may be based in different time zones.

#### **4.4 Student engagement after the review**

The final report should be used to inform students about the outcome of the review at SSLCs or other mechanisms as appropriate. Review reports are published on the University's public website and can therefore be viewed by current and prospective students.

The School's response to the report should be included in SSLC meetings or other appropriate mechanisms. The School should invite students to comment on proposed actions.

The School should continue to invite students to feed in to progress on meeting the recommendations, through SSLCs or other mechanisms as appropriate. **See also Student engagement following the review in Section 11.6**

## 5. Preparatory meetings

**We recommend that the Review information, Remit and Final preparation (review team only) meetings are held digitally. This enables external review team members to attend, which can be particularly valuable in preparing for the review visit, and also maximises attendance from within the University.**

### 5.1 IPR briefings

Internal Review Support facilitates briefings for Schools being reviewed in the coming academic year and for internal review team members. Briefings typically cover the IPR process, tips for preparing the Reflective Report and what to expect during the review visit.. We can also arrange additional meetings with review areas on request to cover specific aspects of the review process.

### 5.2 Review information meeting

The review information meeting takes place prior to the remit meeting and is typically an hour long. It can be held as soon as the internal review team membership is confirmed. Internal Review Support liaises with the School Academic Lead, review team administrator and Convener to confirm an appropriate date. The format is flexible; however a digital meeting will allow the external review team members (if appointed at this stage) to participate and contribute.

The purpose of this meeting is to give the review team members an early insight into the School and its provision in preparation for the remit meeting. It is intended as an informal discussion, which may also help the School clarify for its own purpose some of the items to be proposed for the subject-specific remit. Discussion should also raise any features of provision which will influence the meeting themes for the review visit itself.

It is also useful to note at this point that the School will be asked to prepare a summary report for the remit meeting confirming that all the recommendations from the previous review have been met. If any recommendations have not been met, the summary report should include an outline of the circumstances/alternative actions taken.

#### 5.2.1 Key actions prior to the meeting

##### Academic Lead

- Academic Lead takes the lead in this meeting (a template agenda is available)
- Academic Lead, School administrator for the review, review team administrator, and review team members normally attend
- Academic Lead should identify any additional colleagues who should attend. (**Note:** this is not intended to be a large meeting)

##### School administrator for the review

- If an in-person meeting is preferred, the School administrator is responsible for booking a meeting room in the School and informing Internal Review Support and the review team administrator of the venue.

##### Internal Review Support

- Contacts meeting attendees confirming date, time and location of meeting. If a digital meeting is preferred, Internal Review Support will set this up.

## 6. The Remit

### 6.1 The University remit

The University remit provides consistent coverage of key elements across all the University's internal reviews while allowing for flexibility in the specific focus within each of the overarching themes.

The [University remit](#) and remit meeting agenda template are available on the IPR SharePoint site.

### 6.2 Remit meeting

The remit meeting formally confirms the programmes and courses to be reviewed, including any collaborative provision within the scope of the review, and the items which will form the remit for the review. As with the review information meeting, the format is flexible; however, a digital meeting will allow the external review team members (if appointed at this stage) to participate and contribute. This meeting is typically 60 to 90 minutes long.

In addition to the University remit each review will include specific items proposed primarily by the School and including student-generated items. The School should discuss their specific remit proposals with College prior to the remit meeting to ensure strategic oversight. Schools and students are asked to propose a maximum of two items each for discussion and agreement of the most appropriate item. For the School to gain the most value from the review, it is practical to suggest a short, focused list to which the review can do justice within the constraints of the review visit.

- [School/subject-specific remit item paper template](#)

The meeting will also identify areas beyond the immediate scope of the School where views should be sought on the School's provision as part of the review. These might include:

- Schools that have joint programmes with the provision under review,
- Other institutions with teaching links to the programmes, including partnership arrangements,
- Professional, Statutory and Regulatory Bodies (accrediting bodies) or substantial graduate employers.

If any of these are identified as relevant at the remit meeting, the review team administrator will contact these bodies to invite them to comment.

Progress towards meeting the recommendations from the previous review will have been reported on annually in the Annual Programme Monitoring report and onwards to the College and University. However, the School should take stock of whether all recommendations have been completed and consider any outstanding issues for inclusion in the subject-specific remit. Beyond this, the review will identify outstanding recommendations and will discuss these during the review visit.

When

Meeting takes place approximately four months prior to review

Semester 1 reviews: remit meetings are normally held in May/June of the preceding academic year so that the remit can be agreed well in advance of the review to inform writing the Reflective Report

Semester 2 reviews: remit meetings are normally held in October/November within the same academic year

If the student member of the review team is unable to attend the remit meeting, arrangements can be made for their input to the meeting



Who arranges date	Internal Review Support arranges the date, invites the attendees and confirms the meeting details
Where is it held	<p>If the remit meeting is in-person the School administrator for the review should book a meeting room within the School and inform Internal Review Support of the location of the meeting.</p> <p>If a digital meeting is preferred, Internal Review Support will set this up. (We recommend a digital meeting where possible to allow external review team members to participate.)</p>
Who attends	The Deputy Vice-Principal Students (Enhancement), Head of School, Head of Subject Area/Head of Graduate School (depending on scope of review), Academic Lead, School administrator for the review School Director of Quality, and any other appropriate representatives from the School/student body, the appropriate College Dean/Associate Dean/Director of Quality Assurance, College Quality Officer/Administrator or equivalent role, members of the review team and Internal Review Support Co-ordinator.
Meeting Convener	The Deputy Vice-Principal Students (Enhancement) convenes the meeting.
Student Support Services	If a remit item is likely to have an impact on a Student Support Service, it should be highlighted to the service at this point. The review team administrator should liaise with Internal Review Support if this is the case. There can then be some discussion prior to the review, including a representative of the support service contributing to a meeting during the review.
Institute for Academic Development (IAD) role in Internal Review	There may be opportunities for the IAD to work with Schools as they prepare for their reviews where it looks as though there may be an IAD role in supporting the implementation of recommendations. This should be noted during the remit meeting and the review team administrator will liaise with the IAD and the Academic Lead.

## 6.2.1 Key actions prior to the remit meeting

### Academic Lead

- Prepare documentation to be supplied by the School for the remit meeting
  - Liaise with Internal Review Support to prepare the list of degree programmes and courses
  - Responsible for seeking input to the subject-specific remit from the Head of School and the student body prior to the paper circulation deadline date.
  - Provide the subject-specific items for consideration at the remit meeting to the review team administrator.
  - Provide a summary report seeking confirmation from the previous review that all recommendations have been met and that any outstanding issues are identified at this point, to the review team administrator.

### Review Team Administrator

- Prepare agenda and papers for the meeting ([Remit meeting agenda template](#))
- Circulate the agenda and papers at least one week before the meeting to the attendees
- Support the meeting convener (Deputy Vice-Principal Students (Enhancement)) to ensure all items are covered at the meeting

- Take the formal meeting note and record actions

## 6.2.2 Key actions following the remit meeting

### Academic Lead

- Provide the names of Schools, Institutions, PSRBs or employers to be asked for comment on the programmes under review to the review team administrator.
- Responsible for disseminating the remit within the School as appropriate, including to students/Student Staff Liaison Committees or equivalent.
- A potential outcome might be that some issues are identified to be more appropriately taken forward by the Institute for Academic Development (IAD,) rather than as remit items for the review. It is anticipated that discussion at an early stage in the review process will help identify practice and effective steps that can be taken with the IAD, existing resources or practice relevant to the review itself.
- Begin drafting the review visit schedule with School administrator for the review, review team administrator and review Convener. (IRS will arrange an initial meeting to facilitate this.)
- Coordinate drafting of the Reflective Report and coordinate preparation of documentation for review with the School administrator for the review. **See Section 8 for further information**

### Review Team Administrator

- Contact external bodies identified by the remit meeting inviting them to comment. Any responses will be included as part of the supporting documentation.
- Circulate the finalised remit and the meeting note (highlighting any actions from the meeting) to the attendees.
- Begin drafting the review visit schedule with the Academic Lead, School administrator for the review and review Convener. (IRS will arrange an initial meeting to facilitate this.)

### Review Convener

- Begin drafting the review visit schedule with the review team administrator, the Academic Lead, School administrator for the review. (IRS will arrange an initial meeting to facilitate this.)

### Internal Review Support

- Arranges a brief meeting to begin drafting the review visit schedule. Academic Lead, School administrator for the review, review Convener and review team administrator are invited.

## 7. Review visit preparations

### 7.1 Drafting the review visit schedule

Following the remit meeting, the review team administrator, the Convener, Academic Lead and the School administrator for the review will meet to discuss the review visit format and start drafting the review visit schedule. An Academic Policy Officer from Academic Services will attend the first meeting on an advisory basis.

Most reviews are held over two days, although this depends on the size and complexity of the School and its provision. Reviews normally start at 9am on the first day and finish at 5pm on each day of the review visit. To maximise the time available for discussions during the review visit, feedback sessions from the review team to the School are held digitally following the review visit.

The schedule is tailored for each review to match the remit and nature of the discipline. The format of the review visit can be flexible, for example including in-person and digital meetings. Internal Review support can also offer advice if required.

The School is responsible for booking meeting rooms for the review visit and for organising and meeting the cost of catering for the review visit.

### 7.2 Key actions

#### Academic Lead

- Responsible for inviting School staff and students to the review meetings and alerting them to the review dates and their involvement at the earliest opportunity. Specific times for their slot will be notified later. The Head of School and the School senior management team are normally invited to meet with the review team at the start of Day 1 and at the end of Day 2.
- Responsible for ensuring that staff and students are suitably briefed ahead of the review visit, for example circulating the reflective report as appropriate.
- Where a review has placements or links with external providers as part of its programmes, the structure of the visit should include an appropriate meeting on placements.
- Responsible for inviting any external contacts to the review meetings such as placement providers, industrial contacts.
- Invite students to attend meetings with review team. Meetings with on campus students are normally held over a sandwich lunch on both days. It is important that students are encouraged to attend these meetings in sufficient numbers to give the review team a range of views. (A separate room is often booked for this purpose so that larger numbers can be accommodated for these meetings.)
- Consider how to engage OL students. For reviews including OL programmes consideration should be given at the earliest opportunity as to the most appropriate mechanism for engaging with students. Digital meetings can be arranged, although consideration needs to be given to the timing of these meetings to ensure that they can be arranged well in advance and at a time appropriate to the students. Another option includes circulating an anonymous questionnaire to students to gather feedback on their experience as an online learning student. It may also be useful to seek feedback from staff external to the University involved in the delivery of OL programmes. **Further information about engaging with Online Learning students during the review visit can be found in Section 4.**

#### School administrator for the review

- Arrange the meeting room(s) for the review visit. The main meeting room should be available from 8.30am – 5.30pm approximately and should be secure to allow review team members to leave any papers overnight. This room will be used for the majority of the meetings, therefore it should be large enough to accommodate the likely maximum number of attendees at any one meeting. The preferred room layout is boardroom style.
- A larger meeting room is usually required for the student lunchtime meeting as noted above. It is preferable if this room can accommodate a flexible layout. It is useful to ensure

that there are adequate accessible power points in the meeting room(s) to allow all review team members to use their laptops.

- Arrange catering for review visit. Tea, coffee and water should be available to the review team in their meeting room as indicated on the schedule (jugs of tap water are sufficient).

### **Internal Review Support**

- Liaise with the School administrator for the review regarding any special dietary requirements of review team members. Internal Review Support will arrange an informal dinner for the review team members only on the first evening of the review visit.

### **Review Team Administrator**

- Continue to work with the Convener, the Academic Lead and School administrator for the review to finalise the schedule and to confirm names for each of the meetings where possible.
- Set up any digital meetings for the review visit.

## 8. Review documentation

Following the remit meeting, the Academic Lead should coordinate drafting the Reflective Report and start to co-ordinate the collation of review documentation (see appendix to Reflective Report Guidance).

### 8.1 Reflective Report

The Reflective Report is the key review document and provides a reflective and self-critical evaluation of the programmes being reviewed. It is a confidential, internal document produced specifically for the purpose of the review. (See Reflective Report Guidance.)

As noted above (see 4.2), Schools are encouraged to consult with students on the Reflective Report.

It is important that reviews identify good practice so that it can be disseminated more widely. Schools are encouraged to highlight areas of good practice and enhancement activity in their Reflective Report. Good practice from reviews also feeds into the Institute for Academic Development Teaching Matters website.

The Head of School should delegate writing the report to the appropriate member(s) of staff. Once finalised, the Academic Lead should ensure the Head of School signs off the report before submission to Internal Review Support.

Once the Reflective Report is signed off and submitted, the Academic Lead should circulate the report within the School to members of staff who will be meeting with the review team in preparation for the visit.

Internal Review Support can provide advice for Schools on how to approach preparing the Reflective Report. Reports from previous reviews are available by request from Internal Review Support. Further guidance and a template for the Reflective Report is available on the IPR SharePoint site.

### 8.2 Supporting documentation

The list of supporting documentation is available from Internal Review Support and on the IPR SharePoint site.

The review must be based on sufficient evidence for the review team to form a conclusion on the effectiveness of the School's management of the student learning experience, of quality and standards, and of enhancement and good practice.

The documentation is required **six weeks prior to the review date** however this is the latest date for submission and it is helpful if documentation can be forwarded at the earliest opportunity. Once the documentation is collated it should be forwarded to [internalreviewsupport@ed.ac.uk](mailto:internalreviewsupport@ed.ac.uk) for dissemination to the review team.

### 8.3 Key actions

#### Academic Lead

- Coordinate production of the Reflective Report and collation of supporting documentation
- Ensure Head of School sign off of the completed report
- Circulate report to all School staff and students who will meet the review team during the visit

**Review Team**

- Read the Reflective Report along with the specific section of the supporting documentation that has been allocated to them. This ensures that the documentation is divided up equally amongst the review team members and can be examined in more depth.
- With reference to the remit items and after reviewing the documentation, review team members will be asked to suggest two questions for each meeting to the review team administrator.
- Consideration should also be given to highlighting examples of good practice.

**Review Team Administrator**

- Collates the questions for discussion at the Final Preparation meeting and for inclusion in the review team briefing notes. It is helpful at this stage if the review team administrator can organise questions grouped under any emerging themes.

**Internal Review Support**

- Sends the Reflective Report to the College and obtains the academic standards scrutiny report (from College) for sharing with the School and review team members only.

## **9. Final Preparation meeting – Review team members only**

Also referred to as the final prep meeting, this meeting is held approximately two weeks prior to the review visit. The review team members attend along with an Academic Policy Officer representing Internal Review Support. The format is flexible, however, as with the preparatory meetings, a digital meeting will allow the external review team members to participate and contribute. This meeting is typically an hour long.

The purpose of the meeting is to discuss the key questions for the review visit and to agree the chair for each meeting. It also provides an opportunity to discuss any final arrangements for the review.

If the external members have not already been involved through digital meetings, it is useful for the Convener to make contact with them prior to the final prep meeting, for an informal conversation about the review, and to identify any issues which the external members have noted as being of particular importance.

### **9.1 Key actions prior to Final Preparation meeting**

#### **Internal Review Support**

- Arranges the meeting date and invites the attendees.
- Prepares the biography document and forwards it to the review team administrator.

#### **Review Team Administrator**

- Circulates the draft schedule, briefing notes and the review team biography document to the review team.

### **9.2 Key actions after the Final Preparation meeting**

#### **Review Team Administrator**

- Finalises the schedule and briefing notes and circulates to the review team at least one week before the review visit.
- Provides the review team biography and final schedule, including chairing and themes for exploration at each review visit meeting, to the School in advance of the review visit.

## **10. Review visit**

### **Eligibility to work checks (External & student review team members)**

Prior to the start of the review visit, internal review support will collect fee payment forms and carry out passport checks for the external and student review team members.

### **10.1 Review Team: Preparing for meetings with staff and students**

The structure and tone of meetings should be positive, collegiate and non-confrontational to create an open and honest dialogue. Review team members will take care to maintain anonymity and focus on key issues and remit items.

Meetings with on campus students are normally held over a sandwich lunch on both days. In order to create more time for other meetings, the review team may split in two and meet with students simultaneously over one lunchtime.

### **10.2 Review Team: Identification of commendations and recommendations**

At the end of each meeting review team members are encouraged to summarise or note the key points for consideration as part of the overall commendations and recommendations.

At the end of day one, the review team administrator should summarise the emerging themes, with draft commendations and recommendations, into a brief document for the review team to use in the planning meeting at the start of day two. This also highlights any areas that may require further discussion or clarification with the Academic Lead.

The review team administrator assists the Convener and the review team to ensure that agreement is reached as to whether an issue is identified as either a recommendation or a suggestion whilst the review team are all in attendance. The review team administrator will advise the review team to ensure that recommendations are targeted appropriately. For example, a recommendation should be directed to a committee or a role which has appropriate responsibility for taking it forward; take care to avoid remitting recommendations to 'the University'.

The final meetings digital feedback meetings, on the morning following the review visit, normally include a meeting with the School senior management team and an open meeting with staff and students at which the initial commendations and recommendations are presented. While initial commendations and recommendations are presented after the review visit, the review team may expand upon, amend or remove items during the subsequent report drafting as a result of further consideration.

### **10.3 Key actions**

#### **Academic Lead**

- As the key contact with the review team during the review visit, the Academic Lead should be available to ensure things run smoothly during the review.
- The Academic Lead is normally invited to meet with the review team at the start of Day 1 along with the Head of School and School senior management team, and to the final feedback meeting following the review visit. They may of course be included in other meetings where it is relevant to discussion topics and their role within the School.
- It is occasionally the case during the visit that the review team requests an additional meeting with a member or group of School staff to clarify or for further discussion of an issue. Likewise, additional documentation is occasionally requested, but only where necessary. The Academic Lead will be the main contact to take forward these requests.



**Review Team Administrator**

- Provide the review team, Academic Lead and School administrator for the review with a contact number on which they can be reached. This is useful in case of any unforeseen circumstances immediately before or during the review visit.
- Responsible for taking the formal note of all meetings during the review visit.
- Assists the Convener and review team in identifying emerging commendations and recommendations.

**Internal Review Support**

- Responsible for carrying out right to work checks for the external and student review team members prior to the start of the review.

**School administrator for the review**

- As a key contact with the review team during the review visit, the School administrator for the review should be available to ensure things run smoothly during the review..
- The School administrator is normally invited to the meeting with the Head of School and School senior management team, and to the final feedback meeting following the review.

## 11. Review report and follow-on

### 11.1 Review report

The review team administrator is responsible for drafting the report in consultation with review team members. All review team members will be invited to comment during the drafting process. The review report is structured according to the headings of the standard remit and subject-specific remit items. The report identifies key strengths of the provision reviewed, together with commendations on good practice and recommendations for enhancement of the provision.

The Convener and review team administrator should be able to advise review teams about strategic activity at University and College level when considering possible recommendations. This helps to align review recommendations to projects that are on-going, stops duplication of effort and could provide input to a particular project.

If an issue is minor, but the review team nevertheless wants to flag it as a potentially useful action, it will be included as a suggestion rather than as a formal recommendation. Suggestions can also be helpful in providing a steer on how recommendations might be approached. Suggestions are not tracked in onward reporting.

Further guidance and a report template are available on the IPR SharePoint site.

The full report is published on the University website once finalised.

### 11.2 Review report timeline

2 weeks after review visit	Review team administrator sends draft report to Convener and Internal Review Support for initial comment and amendment
3 weeks after review visit	Review team administrator sends draft report to review team members for comment and amendment
6 weeks after review visit	Review team administrator sends draft report to Academic Lead and School administrator for the review for correction of factual errors
8 weeks after review visit	The School returns any factual errors in the draft report to the review team administrator. The Academic Lead is responsible for ensuring complete sign off by the School is agreed before returning the draft report to the review team administrator.
10 weeks after review visit	Review team administrator incorporates any factual corrections to the report and circulates the final version to the review team and Internal Review Support. Internal Review Support submits final report submitted to Senate Quality Assurance Committee for approval. Following approval by the committee the report is published on the Academic Services website  Final report circulated as appropriate by Internal Review Support

### 11.3 Key actions

#### Review team administrator

- Drafts the report and circulates to Convener and internal review support for initial comment
- Circulates draft report for comment to review team, and incorporates amendments
- Circulates draft report to School (Academic Lead and School administrator for the review) for factual corrections.
- Finalises report after factual corrections are received and circulates to the review team and Internal Review Support

### **Review team members**

- Provide comments on the draft report (receipt of comments triggers payment for external and student review team members)

### **Academic Lead**

- Ensures appropriate colleagues within the School are consulted on the draft to provide factual corrections and final sign off of the draft
- Responsible for providing factual corrections on the report to the review team administrator

## **11.4 Review report approval**

Academic Services reviews the final report and submits it to Senate Quality Assurance Committee (SQAC) for formal approval. Occasionally the Committee may wish to reprioritise or reshape a recommendation to align it better with emerging University priorities. If this is the case Internal Review Support (IRS) will advise the School and other appropriate stakeholders.

IRS will circulate the final report to key stakeholders as appropriate. The report will also be copied to any other areas identified with responsibility for action in relation to recommendations. Following receipt of the final report, the School takes forward action on the recommendations made by the review. IRS publishes the report on the [Academic Services website](#) once it is formally approved by Senate Quality Assurance Committee.

Following formal approval by SQAC the School can dispose of any documents and communications relating to the review.

## **11.5 The 14-week response report**

Fourteen weeks after receipt of the review report, the School makes a response to the Senate Quality Assurance Committee providing an explanation of how each recommendation will be taken forward and the expected date for follow-up or completion should be recorded. The response should report on all recommendations, including those remitted to other areas of the University for action. The Academic Lead will normally be responsible for submitting the report to IRS.

The School submits the 14-week response to IRS ([internalreviewsupport@ed.ac.uk](mailto:internalreviewsupport@ed.ac.uk)). Guidance and a 14-week response template are available from IRS. IRS reviews the responses prior to submission to SQAC to ensure that all recommendations have been adequately addressed. Sometimes, Schools may be asked to provide further information or clarification on a recommendation before the response is submitted to SQAC.

The 14-week report will be published on the [Academic Services quality web pages](#).

## **11.6 The one year-on report**

The School makes a further report on the progress towards completion of all recommendations to Senate Quality Assurance Committee one year after receipt of the final report. This should include the expected date for follow-up or completion of each recommendation. The Academic Lead will normally be responsible for submitting the report to IRS.

The School submits the year-on response to IRS ([internalreviewsupport@ed.ac.uk](mailto:internalreviewsupport@ed.ac.uk)). Guidance and a year-on response template are available from IRS. IRS reviews the responses prior to submission to SQAC to ensure that all recommendations have been adequately addressed. Schools are expected to liaise with any other areas where recommendations have been remitted in preparing their response. Sometimes, Schools may be asked to provide further information or clarification on a recommendation before the response is submitted to SQAC.

The year-on report will be published on the [Academic Services quality web pages](#).

Thereafter, updates on progress towards meeting recommendations are made through the School annual quality report. Reporting on recommendations continues annually until all have been addressed. An overview of progress towards meeting recommendations at College and University level will allow any barriers to be identified, particularly those which lie outside the School's remit and where further intervention on behalf of the School may be required.

### **11.7 Key follow on actions**

#### **Academic Lead**

- Responsible for production and submission of the 14 week and one year on reports to Internal Review Support.

### **11.8 Student engagement following the review**

Schools should involve their students in considering the response to the review report. Review reports should be used in Student Staff Liaison Committees and/or other appropriate fora to inform students of the review outcome and to engage them in follow-on actions. Schools should also include the annual report on progress towards meeting recommendations in SSLC or equivalent agendas.

### **11.9 External access to review reports**

Review reports are published on the University's public website.

Review reports, responses and onward reporting on progress towards meeting recommendations are made available to the Quality Assurance Agency for external institutional reviews.

### **11.10 Review feedback**

IRS welcomes feedback on the Internal Periodic Review process from Schools and review teams. A survey is circulated to review team members and Schools following completion of their review and analysis of responses contributes to the annual review of the process by the Deputy Vice-Principal Students (Enhancement) and Academic Services.

**July 2024**