

# Handbook for Review Secretaries

## Servicing Internal Reviews:

- ◆ Departmental
- ◆ Programme
- ◆ Administrative or Topic
- ◆ Residential Colleges
- ◆ Student Services

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# INTRODUCTION

The University of Otago has instituted a rolling programme of formal reviews of its departments, programmes, administrative processes and residential colleges to effect improvement in teaching, research, and out-reach activities. A Review is conducted by a Panel consisting of members both internal and external to the University. Traditionally, Departments within the University have volunteered the time of staff members to service reviews, and staff recruited to fill the Secretarial role have regarded the responsibility as an opportunity to widen their knowledge and understanding of the University, and to further their own professional development. Although the role is a demanding one, most staff who have been Secretaries to Reviews, have found the experience to be thoroughly rewarding.

This handbook has been developed to guide Review Secretaries, especially those who are new or unfamiliar to the role, through the administrative responsibilities involved in servicing a Review. It is a complement to the Seminar for Review Secretaries conducted annually (February/March) as part of the General Staff Training Programme and the handbook is a companion to the University Departmental, Programme, Administrative and College Review Guidelines. The Quality Advancement Website (available at: <http://www.otago.ac.nz/quality/reviews/index.html>) provides additional Review information, including current review guidelines, the review proposal form, templates and standard Terms of Reference for Departmental, Programme, Administrative and College Reviews. The webpage also provides a schedule of forthcoming Departmental, Programme, Administrative and College Reviews, previous reviews and past convenors and secretaries.

This handbook is intended as a general guide only. There are some variances in the duties of secretaries servicing the different types of review but generally the principles are the same. Secretaries should also allow for some difference in the nature of tasks, due to the individual style and preferences of the Convenor. For the purposes of this handbook we have used the term 'department' in some instances, although the processes can apply to all reviews.

This handbook is reviewed annually – please let us know if you have any additions or amendments which you think we should incorporate. It is a useful resource and is aimed to make the Secretary's role easier.

\*\*\*\*\*  
**QAU have a laptop, cell phone and a 'Review Kit' available for Secretaries – please contact us to reserve these for your review. To access the University staff wireless network you will need to register as a user with ITS ext 8888.**

**If you have any questions about your role or the review process in general, please contact either Megan Wilson, Reviews Coordinator, [m.wilson@otago.ac.nz](mailto:m.wilson@otago.ac.nz) ext 6528, Annabel Rutherford, Reviews Secretary, [annabel.rutherford@otago.ac.nz](mailto:annabel.rutherford@otago.ac.nz) ext 8432 or Chriss Hamilton, Reviews Secretary, [chriss.hamilton@otago.ac.nz](mailto:chriss.hamilton@otago.ac.nz) ext 8861.**

# 1. Prime Function of Review Secretaries

- To provide confidential and high quality administrative and secretarial support to the Convenor and members of the Review Panel
- To function as the Review Panel's principal contact for the review stakeholders, namely
  - Staff and students
  - The Divisional Office within which the Department/Programme/Administrative Unit is located
  - The Central Administration and of the University
  - The wider University community
  - Members of the general public as appropriate

# 2. Key Responsibilities of Review Secretaries

*(Please note that some of the following tasks should be carried out in consultation with the Convenor)*

## 2.1 Discretion and Confidentiality

- A Secretary to a Review Panel will have access to a great deal of material during a Review, some of which may be sensitive. The Secretary is expected to treat as confidential any personal, commercially sensitive material and intellectual property provided to him/her, including all written submissions and the review programme.

## 2.2 Logistics Organisation

- Develop a time line or critical path list noting key activities and the dates by which they should be actioned or completed prior to the Review Visit
- Organise an appropriate venue for the Review (QAU may have already booked a venue)
- Arrange travel and accommodation for visiting panel members (QAU may have already done this)
- Co-ordinate Review advertisements and publicity
- Organise pre-Review planning meetings
- Arrange and co-ordinate all aspects of the Review programme
- Oversee the set-up of the Review venue
- Organise the pre-Review dinner, special functions and catering arrangements for the Review

## 2.3 Financial

- Liaise with the Review Coordinator, Megan Wilson, ext 6528, QAU on all financial aspects. Each Review will have a unique account code – please check this with Megan. If the review is being paid for by another unit/division, liaise directly with them as it will not have a QAU

account code assigned and you will need to get any purchase orders and taxi chits directly from them.

## 2.4 Secretarial

- Circulate all relevant documents to members of the Review Panel including the Self Review Report, supporting documents, submissions, and any other documentation pertaining to the running of the review
- Maintain a systematic filing system of all correspondence and documentation
- Circulate thank-you emails to all those who sent submissions
- Undertake confidential note-taking for the Review Panel as required
- Reaffirm confidential disposal of all review documentation with the Panel, upon completion of the Review.
- Answer enquiries about the review process as required.

## 2.5 Written

- In conjunction with the Convenor, amend advertisements, letters, emails, generic and individual, inviting written or oral submissions. Individual letters may depend on the particular nature of the review. Refer to Appendices E - H for templates. These are available on the QAU website.
- Submit advertisements to the Staff Bulletin and QAU website (send to Megan) and any other publication recommended by the Convenor or Head of Unit being reviewed.
- Notify stakeholders of the review and invite them to make a submission.

**Table 1.1: Categories of stakeholders who may be invited to make submissions**

	Departmental Review	Programme Review	Administrative Review	College Review
Current and former staff of area under review	•	•	•	•
Class Representatives/Student reps eg OUSA, OUMSA, Executives in Colleges	•	•		•
Teaching Fellows & Tutors	•	•		•
Research Assistants	•	•		
HoD/Director/Manager of area under review	•	•	•	•
Heads of other OU departments	•	•	•	•
PVCs/Deans at OU	•	•	•	•
Alumni (past three years)	•	•		•
Relevant General Staff	•		•	•
Other Stakeholders	•	•	•	•

- Write thank-you letters and/or emails to persons who have sent submissions
- In conjunction with the Convenor assist with the preparation of the Review Report as required. This may require formatting, proof-reading, incorporating changes.

## **2.6 Liaison**

- Liaise with the Head of Unit/Dean/Director and the Convenor and Review Panel to obtain suggestions of people who might be invited to make a submission to the Review Panel
- Liaise with the Head of Unit/Dean or Administrator/Secretary to obtain names and email addresses of students, Class Representatives and Tutors for meetings with the Panel
- Liaise with the Alumni & Development Office to obtain a list of alumni provided in email or address label format if required. Depts often have contact with alumni and may also have contact details.
- Liaise with venue and/or catering provider.

## **2.7 Document Management and Disposal**

A Review Secretary has prime responsibility for document management and disposal. Specifically, his/her role is to:

- Ensure all members of the Review Panel are aware that they must confidentially dispose of all material generated by the Self Review and the Review (i.e. submissions, drafts of the Review Report, notes taken during the Review, electronic files including disks and dictaphone tapes).
- Arrange for the return of clean additional copies of the Self Review Report and any other documents provided, to departments at the end of a Review. Make sure that QAU have a copy of the self-review for filing.

# **3. Functional Relationships of Review Secretaries**

- The Convenor and other members of the Review Panel
- Academic and General Staff of the Department/Programme/Administrative Unit being reviewed
- Quality Advancement Unit
- Wider university community
- Students
- External stakeholders if appropriate
- External caterers, venue providers if required.

## 4. Checklist for Review Secretaries

### 4.1 Preliminary paperwork

#### On receipt of receiving the office letter from the DVC 9Academic & International)

- Check that you have a copy of the latest Review Guidelines (Departmental, Programme, Administrative or College)
- Check that you have the full contact details of Review Panel members and a contact person
- Check that you have a copy of the relevant terms of reference for the Review
- Contact the Convenor and arrange to meet.

(NB: All of the above documents should have been attached to your official letter from the Deputy Vice-Chancellor (Academic & International). If not, or if you require further information, contact Annabel at QAU. Copies of the Review Guidelines may also be downloaded from the Quality Advancement Web Page at [www.otago.ac.nz/quality/reviews.html](http://www.otago.ac.nz/quality/reviews.html))

### 4.2 First meeting with the Convenor

#### Preferably within two weeks of receiving the official letter from the DVC (Academic and International)

- Prepare a schedule for the Review process (Appendix A)
- Discuss and schedule meeting with Head of unit being reviewed and administrator/PA with a view to obtaining a list of stakeholders to contact and to meeting with the rest of the staff prior to the review. This is to introduce yourself to the unit and can often take place at a regular staff meeting as you will only need approx. 15 mins at the start and can then leave for them to continue business as usual.
- Discuss outline of review programme (Appendix B). Agree on start/end times, set aside last day for report drafting. Identify possible interviewees (confirm at first planning meeting). You can book meetings with PVC/Dean as early as possible – their diaries fill up. Allow 30 mins for each and on the first day of the review if possible.
- If the review involves students – does the review take place out of semester time or during exams? You might need to schedule meetings with class reps and the Dunedin based panel members prior to the review.
- Discuss possible dates and venues for planning meetings for internal members of the Review Panel, if deemed appropriate by the Convenor (if timing works it's best to have the initial planning meeting after the self-review has been received – and the panel have at least had a brief read through).
- Obtain electronic signature of Convenor – include on invitations to make a submission.
- Suggest venue for pre-review dinner. See Appendix Q for suggested restaurants. Obtain QAU Purchase Order from KC Worden.

- Establish a method of note-taking during the Review – if this is required (some Convenors don't want notes taken). Use of a laptop is strongly recommended and QAU have one which can be booked for your review (see previous note on Wireless).

### 4.3 Organise the Review venue

#### Directly after meeting with the Convenor

- Check with Annabel or Megan at QAU first, we may have already secured a venue for you. Refer Appendix P for a list of venues. Go and see the venue – and liaison person.
- Otherwise, requirements for review venue:
  - We suggest that the venue should be away from the unit under review, thereby assuring confidentiality. Reviews involving clinical staff should take place close to the hospital e.g. Cumberland College, Hunter Centre, or in the hospital itself in the DSM meeting room.
  - Needs to be accessible from approx 8.15am to approx. 6pm and be secure overnight so you can leave paperwork in the room.
  - Must seat all panel members at table with room for paperwork, laptops etc, plus room for interviewees, sometimes in groups
  - Wireless or internet ports (are the ports live?)?
  - Suitable waiting area, that can accommodate seating
  - Sufficient space for working lunches or separate room to be available for lunches
  - Suitable for group interviews (or use lunch room)
  - Quiet – away from noisy areas
  - Close to toilets
  - Will it be suitable to present to the staff or is there another room that can be used for this? Projector requirements?
- Book planning meeting venue – usually the Leith or Billiard Room in the Staff Club.

### 4.4 Introduce yourself to the Review Panel

#### Directly after meeting with the Convenor

- Send out introductory email (Appendix C) copy this to Convenor – or check first that they are happy with this.

### 4.5 Travel & accommodation arrangements for Panel Members

#### As soon as possible or directly after meeting with the Convenor

- QAU may have already done this – if not refer to Appendix D.

## 4.6 Meet with Unit under review

### As soon as possible

- Familiarise yourself with the review process – see our flyer on the website Post review – this tells units what happens next - it's also helpful for secretaries as we often get asked this.
- Meet with the Head/Manager and Administrator/PA of the unit being reviewed, with the Convenor. Request a list of people the panel might invite to make a submission – current staff, other University staff, research partners, external stakeholders, recently retired staff, alumni, list of class reps, postgraduate students, - you will need email contacts for all the above. (if you can have them in Excel format it will be easier to send out mail merge notices) **You will need this list of contacts 10 – 12 weeks before the review**, ideally, to give yourself time to get the notices out, for people to write their submissions and for the Panel to receive them two weeks prior to the review.
- At this meeting, arrange for you and the Convenor to go to a regular staff meeting for the initial 15 mins approx – just to introduce yourselves, break the ice and answer any queries on the review process. (Take the QAU handout on Post-Review). Your Convenor should be able to answer most questions but you can refer people to us if you are unsure or follow-up with us and get back to them. As you will be sending out emails inviting them to meet with the Panel it helps if they can put a face to a name.

## 4.7 Advertise the Review

### Commence 8 – 10 weeks before the Review. Complete no later than four weeks before the Review

- Prepare notice for the Staff Bulletin. Appendix E. There is now a dedicated category for Reviews in the Staff Bulletin. 2 x notices in the Staff Bulletin. First one to appear approx 5 – 6 weeks before Review. Depends on publication dates of Staff Bulletin.
- Prepare and send a notice, based on the Bulletin advert, to [all.depts@otago.ac.nz](mailto:all.depts@otago.ac.nz) or [Otago-depts@otago.ac.nz](mailto:Otago-depts@otago.ac.nz) as appropriate. Remember to include Wellington and Christchurch when necessary. Request that the notice is circulated and posted on both staff and student noticeboards.
- Email a PDF version of the Bulletin notice, expanded to include a list of all Panel members and the Terms of Reference, to [m.wilson@otago.ac.nz](mailto:m.wilson@otago.ac.nz) to appear on the QAU website.
- Send personalised email messages to all staff in the unit – see Appendix F. Send emails or hard copy letters as appropriate to stakeholders. Provide the Convenor with sample letters to annotate for specific recipients. Appendices G and H.
- Notify the Panel who has been invited to make a submission – and where adverts have been placed. Ask if they would like to add to the list.
- Note: Submissions deadline should be approx 2-3 weeks before the Review. This will give you time to circulate submissions, the Panel time to read them and act on any issues arising. Bulletin deadline is one week prior to publication, so work back for scheduling purposes. Refer to the Bulletin website for the publishing schedule.
- As submissions come in by post or email, send out thank-you messages Appendix I.

## 4.8 Self-review

### 6 – 8 weeks before the Review. Complete no later than four weeks before the Review

- Self Review should be ready for dispatch 6 – 8 weeks prior to the review. You should receive a hard copy for each panel member plus one for QAU files – these will all be sent to you to send out to the Panel, you can send the ring-binder at the same time. QAU have large plastic envelopes for these.
- We are asking units under review to also provide soft copies of their self-review, preferably on memory stick but CD is acceptable. This is particularly helpful where there are large appendices.
- Obtain A4 ring binders with cover insert and dividers for each panel member. Prepare a folder for each panel member. We can probably do these for you.
  - It should include:
    - Terms of Reference
    - Panel member list
    - Review Process diagram (Appendix K)
    - Staff list of unit under review
    - Graduate Opinion/Student Opinion Survey data (QAU manage these and can supply)
    - A4 refill pad
    - a campus and town map for external members (QAU have a supply of these) accommodation information
    - Flight itineraries
    - One taxi chit for external panel members (QAU can supply)
    - Appropriate reimbursement forms for external and internal panel members (on website)
    - Reminder of confidentiality (Appendix N)
    - Dividers for other information to be sent at a later date: submissions; programme; meeting notes.
    - Any other information you think is relevant e.g. recent media releases
  - Check that all required supporting documents as specified in the Review Guidelines, are submitted with the Self Review Document. Bear in mind that there may be good reasons why all the required documents have not been submitted. If in doubt discuss with the Convenor.
  - Send all documents to Panel. Mark CONFIDENTIAL. Send by Courier Post for external panel members. Use appropriate code and review name for reference – if QAU is paying. Request that all panel members acknowledge receipt of the self-review document.
  - Read the main part of the Self Review Document – this often alerts you to problem areas, how staff are grouped and can help with planning the programme.

## 4.9 First planning meeting for Dunedin based panel members

(note: a planning meeting is not always required by the Convenor)

### 4 – 6 weeks before the review

- After self-review has been received by Panel and they have at least had a brief read through the main section! (you might have to be flexible on this, sometimes the self-review is very late)

- Convenor confirms lines of responsibility for questioning and drafting of text, follow up any issues arising from the self-review material
- Confirm list of people invited to make submissions and list of possible interviewees. How will you organise that – groups of people, individuals, student groupings (undergrads/postgrads/PhD – usually best over lunch or tea breaks) Have you covered everyone? Are there people outside the unit or University whom you need to see? District Health Board staff are often included in Health Science/DSM reviews
- Is there a particular order that they want to see people in?
- Set dates for additional planning meetings if required and arrange venue
- Circulate notes from planning meeting to all panel members.

#### **4.10 Prepare Visit Programme for the Review** (Appendix B)

**4 weeks before review – note that you should book meetings for PVCs/Deans/HoDs at an earlier date.**

- Commence at least one month before the Review. Complete no later than one week before the Review. This can be very protracted as some people will take a long time to get back to you with their availability – starting early is always a good plan! Particularly with students and groups.
- Try and reserve sufficient break periods for panel members to discuss and reflect on issues arising during the Review. Include debrief time at start and end of each day.
- Note that the Property Services Director is required to meet with the Panel in the case of Departmental, College and some other Administrative Reviews. It is helpful to schedule this meeting after the tour of the facilities.
- Make appointments for all persons to be interviewed see Appendix B for suggested times. Allow one hour for the Head of the Unit, 30 mins for PVCs., Deans, and adjust timings for group meetings as necessary. Allow 5 – 10 min buffer time.
- Make appointments for senior staff first. Don't forget general staff - technicians, admin
- Contact your student reps early on as they will need several reminders before they respond. Be very specific about the purpose of the interview for student groups, what will happen, types of question – they often need reassuring about the process. Some Convenors ask the Student/Graduate rep to lead the questioning for this – which works well. Your student rep can often help with organising these meetings.
- Send draft programme to Panel members as soon as you can - check they are happy with it and to let you know if they would like to add anyone else (they won't now but they will during the review!)
- Note that you may need to add meetings in after submissions have been received. If you can, leave a few gaps for late meetings.
- Have you allowed for a tour of the unit? Allow time for walking there and back. Confirm who is to show the panel around – if labs are included you will need extra time. Schedule this either before lunch or at the end of the day so you can run over time if needed.

- Leave the last day free of meetings if you can – to allow for preparation of the report. The Head of the Unit is often called back for further information (make sure you let them know they may be needed) and the panel present to the Head formally.
- Check with Convenor and then issue a general invitation to staff of the unit to attend a presentation of findings (after the initial presentation to the Head of the unit) – this can be done within their unit (e.g. dept seminar room) if that is easier.
- Prepare initial catering arrangements – provide estimate of numbers and times that food is required.
- Organise parking requirements for external interviewees – contact Judith Thompson [judith.thompson@otago.ac.nz](mailto:judith.thompson@otago.ac.nz) ext 8250 for parking permits for outside the Registry building. Other areas of the campus may have visitor parking e.g. Commerce, Residential Colleges.

#### **4.11 Prepare list of submissions received**

##### **Two weeks before the Review**

- Send list, together with copies of submissions received, to Convenor and Panel either by email (PDF format) or hard copies. Mark CONFIDENTIAL and send to external panel members by email or Courier Post. Request that all panel members email you on receipt and remind them that these are confidential to the Panel.
- Note: be prepared to receive late submissions right up to and during the review visit. Check your email throughout the review visit and make sure all panel members have an up-to-date list of submissions received.

#### **4.12 Second planning meeting if required**

##### **One to two weeks before the Review**

(n.b. the dinner could take the place of this meeting)

- Discuss any issues arising from submissions – any additions to the programme?
- Circulate notes from planning meeting

#### **4.13 Final check with out-of-town Panel Members**

##### **One week before the Review**

- Confirm travel, accommodation and book airport pick-up – send contact details for taxi to externals. Make sure they have an out of hours contact number for you – especially if they are arriving at the weekend, in case of delays. You can give them the Review Secretary cell phone number and take that home with you.
- Arrange internet access via wireless for external Panel Members if needed. – see Appendix D for details.
- Confirm dinner with restaurant and panel

#### **4.14 Send out emails confirming interview times (Appendix K)**

##### **One week before the Review**

- Confirmation should be sent to people being interviewed by the Panel.

#### **4.15 Circulate all final documentation for the Review**

##### **One week before the Review**

- Check that the Convenor and Panel Members have up to date documentation required e.g. late submissions, final version of the programme
- Provide a copy of the final programme to someone who will be on hand to take phone messages relating to the review– this could be QAU.
- Prepare name badges for group interviews and for Panel. QAU have place card holders for Panel members. Use the templates Appendices L,M.

#### **4.16 Finalise catering arrangements**

##### **One week before the Review**

- Confirm numbers and times, provide schedule for caterer indicating the time and location where food is required. Include times for them to clear lunch – 10 mins before your next meeting is good.
- Obtain purchase order for review dinner, if needed.

#### **4.16 Prepare meeting room – depending on the venue some of this will be done for you**

##### **Day before and during the Review**

- Ask QAU to send over 'Review Kit' and printer to venue. Collect laptop from QAU. You will need to provide your own memory stick. Have you registered as a wireless user with ITS (ext 8888)? If you are in St Margaret's they have their own wireless provider and you can log on using your University username and password. They can provide guests with a log on. Anywhere else on campus and hospital will require you to be registered as a user first
- Do you need a key? Will the room be open on time?
- Wireless or internet port? Is the port live?
- Access to telephone (QAU have a cell phone you can book for your review).
- Seating arrangements
- Will it be secure to leave documents and folders overnight?
- One full set of the Self-Review material
- Make arrangements for printing, photocopying or faxing material if required.

- Make sure you have your own telephone list of key contacts (e.g. a name of someone who can provide backup assistance if required – QAU) and interviewees
- Water, glasses (sufficient number for interviewees as well)
- Tea and coffee facilities (continuous supply preferred)
- Seat(s) in waiting area for those waiting to be interviewed
- Notices for doors and directions if necessary.

#### **4.18 Review Day 1**

Be there early – you will need at least 15 mins before the panel arrive to set up laptop, documents, place cards etc and put out water glasses.

#### **4.19 Last day of the review**

- Confirm pick up venue and time for externals – can they leave luggage at place of accommodation and pick up en route?
- Remind them that GST receipts must be supplied for reimbursement and to send forms to QAU
- Pack up boxes – you can phone the Campus Courier the next working day to have these returned to QAU.
- Go home, relax!

## **5 The Review Report**

In conjunction with a time schedule and target completion date usually 6 – 8 weeks after the review date.

- Assist the Convenor with the preparation of the Review Report if required. Level of assistance will vary – you may not be asked to do anything further but you could be asked to proof-read, edit, format or to follow-up on queries. Ask QAU - we have worked with lots of Convenors and can probably give you an idea of the input required.
- Once the Panel have agreed on a final version, this has to be sent to the Unit head to check for factual accuracy. They have two weeks to do this and should be sent the QAU Fact Check Policy at the same time as the report. The report is still confidential at this stage so although we understand that the Head may wish to consult on some facts, the report should not be widely circulated. They may also wish to change the narrative but it is up to the Convenor and the Panel to decide if they wish to incorporate those changes. Once the factual check has taken place and necessary changes made, the report can be submitted to QAU, to Megan, for submission to the University. See our post-review flier for more information on this.
- Members of the Review Panel will be sent a final copy of the report once it has been released. See QAU website for details on release procedure.

## **5.1 Report to the Quality Advancement Unit**

On any action that might be needed beyond the period of the Review (for example, where an individual gave a written submission to the Panel and requested in their submission a copy of the Review Report after its release).

## **5.2 Arrange for Confidential Document Disposal of Review Material**

- Reaffirm confidentiality of all material generated by the Self Review and the Review (i.e. submissions, drafts of the Review Report, notes taken during the review, electronic files including CDs and memory sticks) and appropriate confidential disposal. We have a confidential destruction bin if you want to send things to us for disposal.
- Return any clean additional copies of the Self Review Report to the department/unit being reviewed.
- Retain one copy of the Self Review for QAU files

## APPENDIX A: Overview and sample timeline for review preparation

<b>Week</b>	<b>Requirement</b>	<b>Checklist number</b>
	Receive official letter from DVC (Academic & International)	
On receipt of letter	Check you have received the Preliminary paperwork Contact the Convenor and arrange to meet	4.1
As soon as possible	Meet with Convenor Organise venues for the review, planning meeting (if needed) and pre-review dinner Introduce yourself to panel members Meet with Dept/Programme/Unit Head & Secretary/Contact and staff meeting	4.2 4.3 4.4 4.4 4.6
8 – 10 weeks before the Review. Complete no later than four weeks before.	Advertise the review, send out submissions notices Distribute Self-Review material and folders Planning meeting for Dunedin based panel members	4.7 4.8 4.9
Commence at least four weeks before.	Prepare visit programme	4.10
Two weeks before.	Prepare list of submissions received and circulate to panel Planning meeting if required	4.11 4.12
One week before	Confirm travel and accommodation arrangements Send out confirmation of meeting times to interviewees Circulate all final documentation for the review Confirm numbers and catering requirements	4.13 4.14 4.15 4.16
Day before	Prepare meeting room	4.17
<b>Review day</b>	<b>Be there early!</b>	<b>4.18</b>

## APPENDIX B: Sample Visit Programme - Departmental Review

A Visit Programme for a departmental review may look something like the following model. Note that this will vary depending on the type of review and number of interviews.

HoD/Director/Head of unit: allow one hour and this should be the first meeting

PVC: allow 30 mins

Other individual meetings: as a general rule allow 20 mins but have a 10 min buffer time.

Group meetings: allow full 30 mins if more than three people

Try and time for the Panel to have discussions throughout the day – try to reserve some breaks for the Panel only. The day may run later depending on how the panel and convenor work – be prepared to stay late.

Day 1 typically would involve senior staff. Day 2 may involve other staff, class reps, tutors and postgraduates, general staff. Day 3 generally we like to keep this free of meetings when possible (apart from a call-back with the Head, and presentations) so the Panel can start work on the presentation to staff and the draft report.

### EXAMPLE

#### Departmental Review

**Date**  
**Venue**

<b>Sunday</b>		Pre-review Panel Dinner 7.00pm, Venue
<b>Monday</b>	8.30am	Panel convene
	9.00 – 10.00am	HoD
	10.15 – 10.45am	PVC
	10.45 – 11.00am	Morning tea
	11.00 – 11.20am	Interview
	11.30 – 11.50am	Interview
	12.00 – 12.20pm	Interview
	12.30 – 1.30pm	Lunch – with student group?
	1.30 – 2.00pm	Panel time
	2.00 – 2.20pm	Interview
	2.30 – 2.50pm	Interview
	3.00 – 4.00pm	Tour of Department – confirm who will lead this, (usually the Head of unit)
	4.00 – 4.15pm	Afternoon tea
	4.15 – 4.35pm	Barry MacKay, Director, Property Services (Property Services are required to meet with Departmental Review Panels and some Administrative Panels)
		Panel debrief
		Dinner, own arrangements

<b>Tuesday</b>	8.30am	Panel reconvene
	9.00 – 9.20am	Interview
	9.30 – 9.50am	Interview
	10.00 – 10.20am	Interview
	10.30 – 10.45am	Morning tea
	10.45 – 11.05am	Interview
	11.15 – 11.35am	Interview
	11.45 – 12.05pm	Interview
	12.15 – 12.30pm	Panel time
	12.30 – 1.30pm	working lunch/with group/panel discussion (Post-graduate students/tutors?)
	1.30 – 2.00pm	Panel time (if needed)
	2.00 – 2.20pm	Interview
	2.30 – 2.50pm	Interview
	3.00 – 3.20pm	Interview
	3.30 – 3.45pm	Afternoon tea
	3.45 – 4.05pm	Interview
	4.15 – 4.35pm	Interview
		Panel debrief
		Own arrangements for dinner
<b>Wednesday</b>	8.30am	Panel reconvene
	9.00 – 9.20am	Panel time/Interview
	9.30 – 9.50am	Panel time/Interview
	10.00 – 10.20am	Panel time/Interview
	10.30 – 10.45am	Morning tea
	10.45 – 12.30pm	Call back slots/spare time
	12.30 – 3.30pm	working lunch & prepare preliminary findings
	3.30 – 4.00pm	Present preliminary findings to HoD and any Staff he/she wishes to attend
	4:00 – 4:30pm	Presentation to staff of unit
	4.00 – 5.00pm	Panel debrief, discuss next steps.

External panel members' departure time: this will probably dictate what time you do the presentations – it is often earlier than above. If one panel member has to leave early you may be able to do the presentation without them – check with the Convenor.

## APPENDIX C: Sample - Introductory email to Panel members

*This is a comprehensive version which may need editing depending on what contact the Convenor has already had with the Panel. Obviously change wording as you wish.*

Dear Panel Members

You should, by now, have received a letter from Professor Vernon Squire, Deputy Vice-Chancellor (Academic & International) inviting you to take part in the Review of ????

I am writing to introduce myself as the Review Secretary to the Panel. My role is to provide administrative and secretarial support to the Convenor and members of the Review Panel. I work in the ??? and have been seconded to this role.

I work closely with the Convenor to advertise the review, collate submissions and prepare the review programme.

**(((Travel and accommodation may already be arranged - check with QAU)))**

I am also responsible for arranging travel and accommodation for external panel members and will write separately regarding this. All panel members should note that there will be a pre-review dinner, for panel members only, which will take place on ??? - **note if your panel members are all Dunedin based you probably won't have this dinner. Some Convenors prefer not to have a dinner - check this early on.**

The review itself will take place in (Venue) and you should expect that we will meet at 8:30am – 6:00pm approx. each day. (We try to reserve the last day for drafting and preparation of findings to present to the Department - and may finish at an earlier time). These times will be confirmed later in the process when we have put together a visit programme.

**The self-review document is being prepared and I will notify you when you can expect to receive it.** I will endeavour to keep you updated on the review preparations, as necessary.

**The Convenor has indicated that he would like to hold a pre-review meeting in Dunedin for the Dunedin based panel members once the Self-review documents have been received. I will contact you to arrange a suitable time.**

Please check that your details on the attached panel member list are correct and let me know if you have any special dietary requirements so that I can plan accordingly. Thank you.

I am looking forward to meeting and working with you. If I can be of any assistance please don't hesitate to contact me – my office hours are ?? should you wish to contact me by phone.

Many thanks  
Kind regards

## APPENDIX D: Travel, Accommodation and Internet for External Panel members

In most cases, QAU will already have arranged travel and accommodation. If not, follow the guidelines below:

### **Accommodation**

Panel members arrive the day before the review. We would expect NZ based Panel members to depart on the last day of the review. Overseas panel members usually need to stay an additional night. Suggest that you book them into the Executive Residence. Provide an account code (from QAU) to the Exec Res.

If the Exec Res is full try:

526 George St Boutique Hotel  
<http://www.hotel526.co.nz/>  
Tel: 477 1261

For George St bookings, you may need to provide a purchase order no. from QAU.

**Air Travel** - some panel members have complicated travel arrangements, if you have any queries please ask us.

### Domestic

For a QAU budgeted review, you will have to send all details to Annabel [annabel.rutherford@otago.ac.nz](mailto:annabel.rutherford@otago.ac.nz) or Chriss [Chriss.hamilton@otago.ac.nz](mailto:Chriss.hamilton@otago.ac.nz) so that the flights can be purchased online, with the QAU PCard.

Otherwise - book as per University policy. Include insurance for domestic flights.

### International

As per University policy through a travel agent. Charge to relevant account code for that review. Panel members are covered by the University insurance policy so you won't need to purchase this – make sure that QAU has the panel members' details and dates of travel. If panel members want to book from country of origin, you should get a comparative quote to ensure the University will cover their fare. They need to keep all receipts for reimbursements. No receipt, no reimbursement!

### **Rental cars:**

If a panel member wants to rent a car to drive from Christchurch to Dunedin for example, you will have to see how that compares with the cost of air travel (include cost of petrol) as reimbursement may be limited to the cost of an equivalent flight plus airport transfers. Note that we will cover only for the review period – some externals follow the review with a holiday!

Book rental cars as per University Policy – use a PO number from QAU. Note that you do not need to include the rental car company insurance as the University insurance Policy will cover this.

## Expenses

QAU will cover all 'reasonable' expenses. Typically these include taxis, parking, mileage (if they drove to the airport or review), meals (at airport or on non-review dinner nights). 'Reasonable' and 'moderate' are good words to use (ie no \$100 bottles of wine).

We have our own forms at QAU for reimbursement – these are available on the website.

## Internet Access via Wireless for externals

This seems complicated and probably not necessary but in case they ask....

1) Generate usernames for them - complete the University Username form at <http://www.otago.ac.nz/its/staff/username.html> and note somewhere on the form that wireless access to UO-STAFF is required. Note that without ID cards they will not have access to library borrowing, restricted door areas or after-hours access to buildings.

2) Register their laptops to allow access to the network. Each machine needs to be individually registered. Obtain the MAC addresses for the wireless cards and wired network cards if needed (instructions below). Then complete the online form at <http://www.otago.ac.nz/its/networkphones/ea-reg.html> - **registrations takes 24 hours to process.**

Once both steps are complete they will be able to connect to the wireless network and use the internet.

If any of this is unclear please contact the ITS Helpdesk or your usual IT staff for clarification.

### Obtaining your MAC address - for OS X

Click on the Apple at top left > System Preferences... > Network. Click on "Airport" or "Built-in Ethernet".

Go to Advanced > Ethernet > Your MAC Address is called an Airport ID or Ethernet ID.

### Obtaining your MAC address - Windows

Start Menu > Run..

Type 'cmd' without quotes and press Enter.

At the command prompt, type 'ipconfig /all' without quotes. (space between g and /) Your MAC Address is listed under 'Physical Address' as a series of 6 groups of two digits, letters and numbers, separated by dashes. Make sure you get the physical address of the correct network adapter - usually there are several listed.

## APPENDIX E: Sample Advertisement for Staff Bulletin - Departmental Review

Note: Review notices are published in the Staff Bulletin's Review Notices section. Complete the details at the following link <http://www.otago.ac.nz/news/bulletin>. Publication dates are also listed here – note that you need to send in the notice by 12 noon Friday prior to publication.

The Staff Bulletin allows approx 200 words for a notice – you can just copy and paste this into the text box in the link above. This wording could also be used to send a general email notice to all University departments or Otago departments as appropriate.

### REVIEW OF THE DEPARTMENT OF <<department name>> <<review date>>

A Panel has been convened to review the <<department name>>

Convenor:

The Review Panel has been asked to review, evaluate and report to the Deputy Vice-Chancellor (Academic & International) on the quality and adequacy of the Department of <<department name>>.

A copy of the full Terms of Reference, list of Panel members or further information may be obtained from the Review Secretary <<name, address, contact details>> or the Quality Advancement Unit web site: <http://www.otago.ac.nz/quality/reviews/Index.html>

#### Written submissions

Interested parties are invited to make submissions relevant to the Terms of Reference to the Review Panel. All submissions will be confidential to the Review Panel.

Such submissions should be sent to <<Review Secretary's name>>, at the postal or email address above by <<submission deadline>>. Envelopes should be marked "Confidential: Submission for <<Review name>>".

#### Oral submissions

Interested parties are invited to make oral submissions relevant to the Terms of Reference to the Review Panel. Please contact <<Review Secretary's name>> no later than <<date>>.

## APPENDIX F: Sample Letter/Email - Departmental Review

**Note: The following samples are based on a departmental review. The wording will need amending to suit other types of review.**

Convenor to annotate as appropriate.  
(LETTER TO STAFF)

<<date>>  
<<name>>  
<<address>>

Dear << name>>

### REVIEW OF THE DEPARTMENT OF <<Department name>>, <<date>>

You will be aware that Professor Vernon Squire, Deputy Vice-Chancellor (Academic & International) has set up a panel to review and report on the quality and adequacy of the Department of ????. On behalf of the Panel I invite you to comment on any matter which you feel to be important or relevant to the Review. Full Terms of Reference are attached.

Members of the Panel are <<insert names>>.

We would like to encourage all staff – academic, research and general to make use of the opportunity afforded by the Review process to make a submission on any of the matters covered by the Terms of Reference (copy attached). Written submissions should be sent to the Review Secretary <<name and contact details>> either by post or email (PDF format preferred). Envelopes and emails should be marked “CONFIDENTIAL: Submission for the Review of <<review name>>...” and are to be received no later than <<date>>. All submissions remain confidential to the Panel.

If you would like to make an oral submission, either in addition to or as an alternative to a written submission, please contact the Review Secretary by <<date>>.

Specific individuals in the Department will be invited to talk to the Panel and we will also be inviting representatives of staff groupings to meet the Panel. We will liaise with department staff in the near future to make these arrangements.

If you require further information on any matter pertaining to the Review please do not hesitate to contact me or the Secretary to the Review Panel

Yours sincerely

Convenor of the Review Panel  
Encls

## APPENDIX G: Sample Letter

Convenor to annotate as appropriate

**(LETTER TO STAKEHOLDER/CLOSE ASSOCIATE)**

**<<date>>**

**<<name>>**  
**<<address>>**

Dear **<<name>>**

### **REVIEW OF THE <<Review name and date>>**

As part of its ongoing programme of Quality Assurance, the University is about to review and report on the quality and adequacy of the **<<dept>>**. The Department gave us your name as someone who may be interested in the review, as a **research partner/alumn/employer**. On behalf of the Review Panel, I invite you to comment on any matter which you feel to be important or relevant to the Review. The Terms of Reference are attached and you might wish to reflect in particular on the following paragraphs from the Terms of Reference:

**<<add appropriate detail in consultation with the Convenor>>**.

Members of the Panel are **<<list names and functions>>**

The Review Panel may also like to meet/speak with you. The Secretary to the Review Panel, **<<name>>**, will contact you if this is required.

Written submissions should be sent to the Review Secretary **<<contact details>>**, by email (PDF preferred) or by post to **<<your address>>**. Envelopes and emails should be marked "CONFIDENTIAL: Submission for the University of Otago **<<review>>**". The Panel will treat your submission in the strictest confidence. Written submissions to be received no later than **<<date>>**.

You can find out more about the University's review process at [www.otago.ac.nz/quality](http://www.otago.ac.nz/quality). If you require further information on any matter pertaining to the Review please do not hesitate to contact me or the Review Secretary.

Yours sincerely

**<<Convenor's name>>**  
Convenor of the Review Panel

## APPENDIX H: Sample Letter for student group meetings

Convenor to annotate as appropriate – can be used for postgrads/undergrads/tutors/class reps. This is often best coming from the Secretary as they will need to respond directly to you and you will need to send out at least two reminders!

<<date>>

<<name>>  
<<address>>

Dear <<name>>

### REVIEW OF THE <<Review name and date>>

As part of its ongoing programme of Quality Assurance, the University is about to review and report on the quality and adequacy of the <<dept>>. Internal reviews of all University departments take place every 5 – 7 years. You can find out more about this process at [www.otago.ac.nz/quality](http://www.otago.ac.nz/quality). The Terms of Reference and list of panel members for the review can be found here.

The Deputy Vice-Chancellor (Academic & International) has appointed a panel who will visit from ??? to conduct discussion with interested and relevant parties. It is important for the Review Panel to hear from the student body, as well as staff.

We invite class reps/tutors/Phd students to attend a group meeting with the Panel on:

Date:  
Time:  
Venue:

RSVP to this email stating any dietary requirements.

The meeting will be informal and the Panel will probably ask you to introduce yourselves and to tell them a little about your studies/research. They may have specific questions relating to Teaching and Research – and you will have the opportunity to raise topics you feel are important to the review.

All discussions remain confidential to the review panel. Individuals are not identified in the final report which will become a public document within the University community.

If you have any questions about this meeting or the review process in general please contact me, otherwise I look forward to hearing from you.

Kind regards

Review Secretary

## APPENDIX I: Sample Thank-you Letter for Submissions

Suitable for post or email - will usually come from the Secretary.

<<*date*>>

<<*name*>>

<<*address*>>

Dear <<*name*>>

### REVIEW OF THE DEPARTMENT OF <<*Department name*>>

Thank you for your submission to the Panel that is reviewing the Department of <<*Department name*>>, University of Otago.

The Panel is very grateful to you for your time and effort in submitting comments. The information you have provided will be helpful to the Panel in preparing their recommendations.

Yours sincerely

Review Secretary

## APPENDIX J: Sample email confirming meeting time

**REVIEW OF THE UNIVERSITY OF OTAGO**  
**<<NAME OF DEPARTMENT / PROGRAMME>>**

This is to confirm that your meeting time with the <<*Name of Review*>> Review Panel is on:

**<<Day>>, <<Date [day/month/year]>>**  
**<<Time>>**

The venue is the <<*venue + directions to venue as appropriate*>>.

On your arrival, please take a seat outside <<*venue*>> and you will be invited in.

Attached for your information please find:

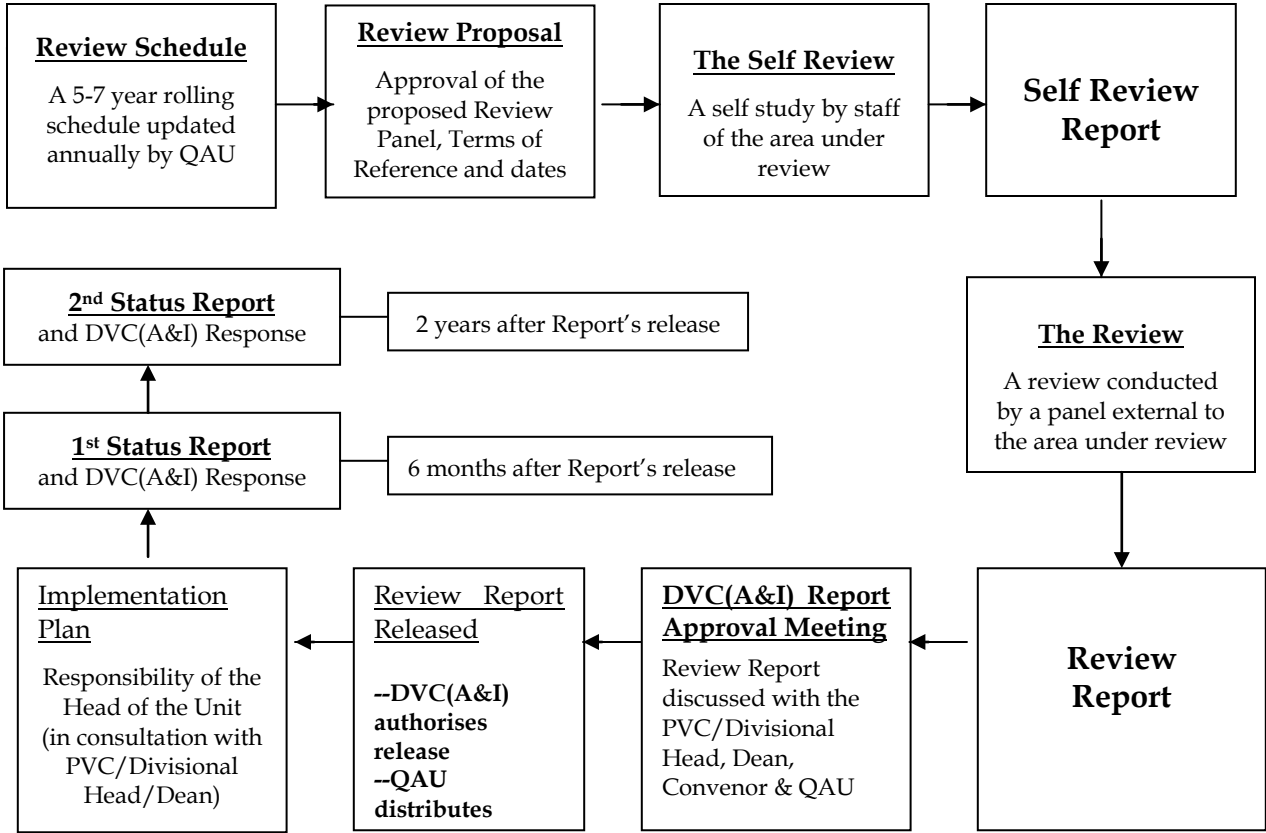
- A list of the <<*name of Review*>> Review Panel members
- The Terms of Reference of the <<*name of Review*>> Review

*(Include directions/map to venue and waiting area if needed)*

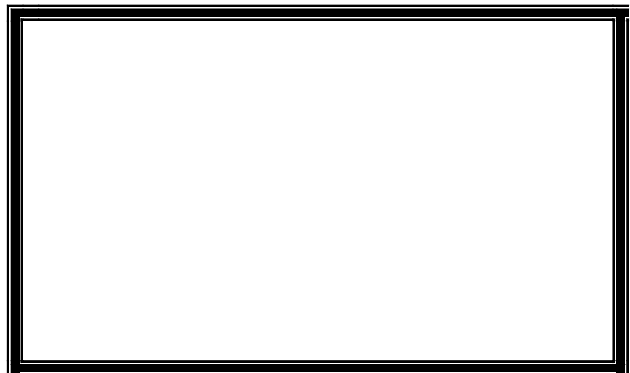
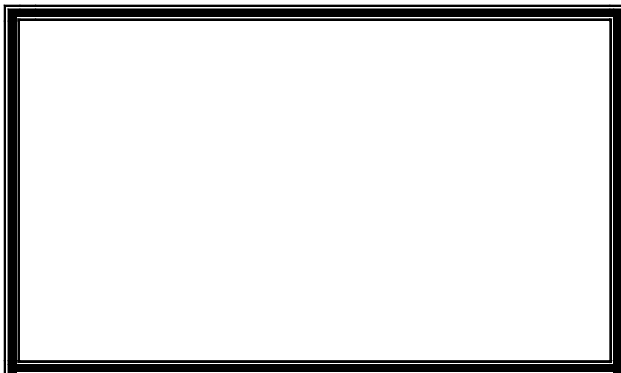
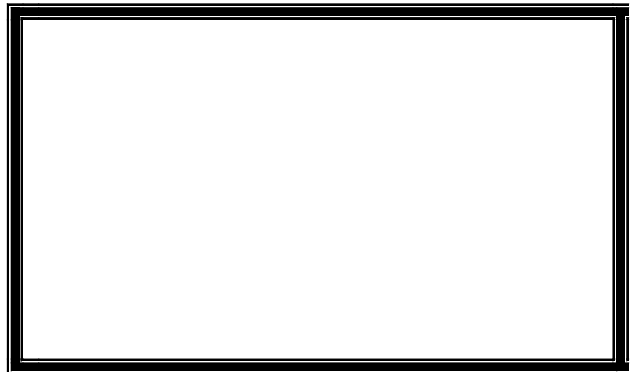
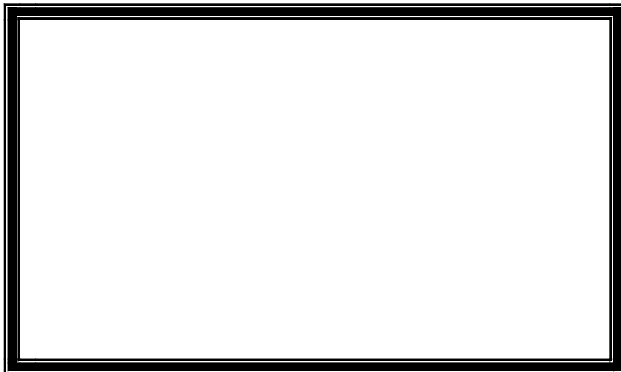
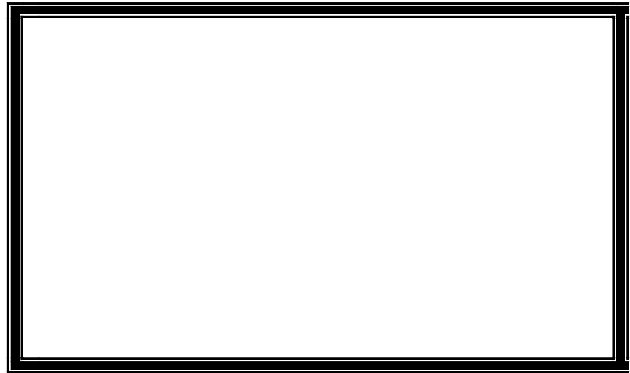
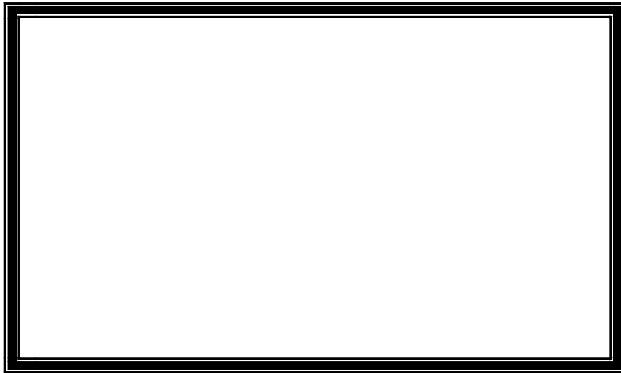
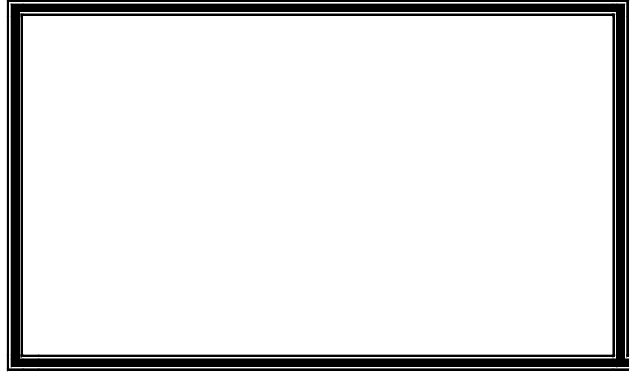
Thank you for making yourself available to meet the Review Panel at this time.

If you have any questions please do not hesitate to contact me.

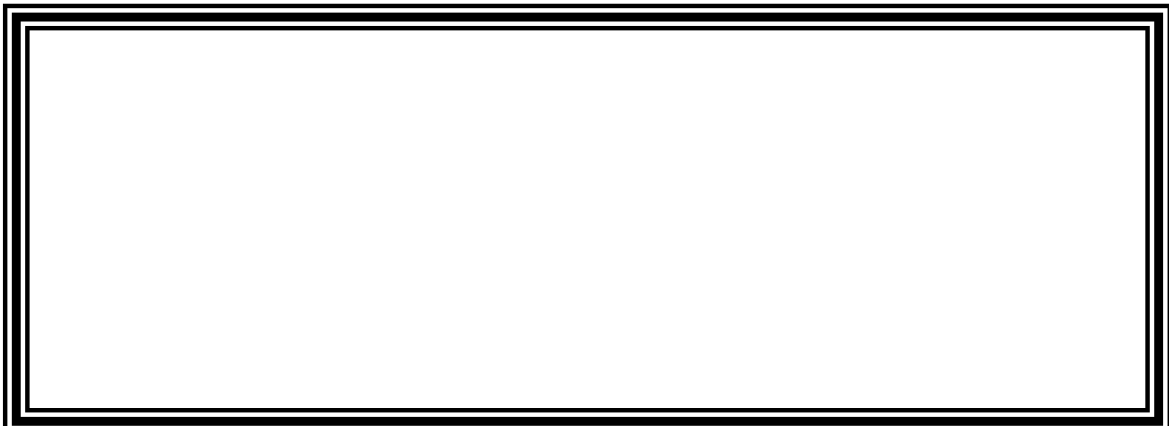
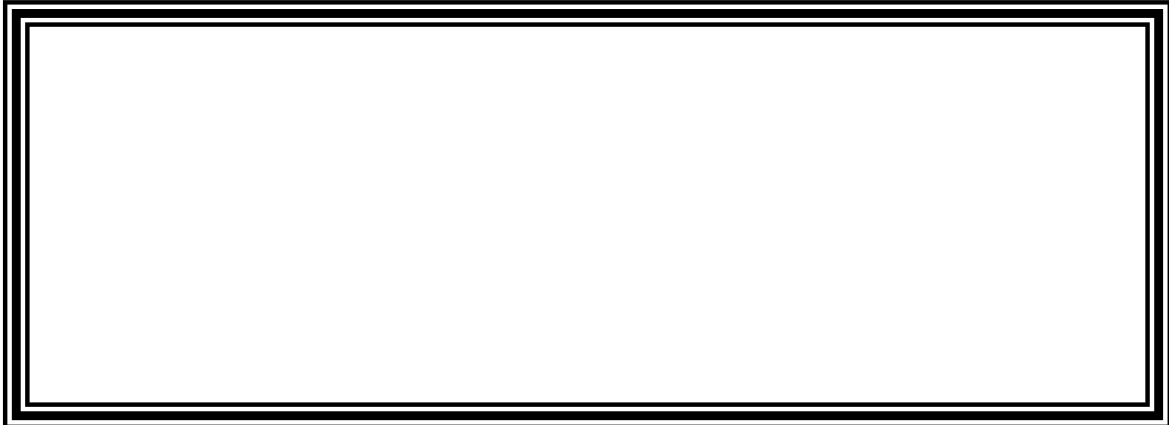
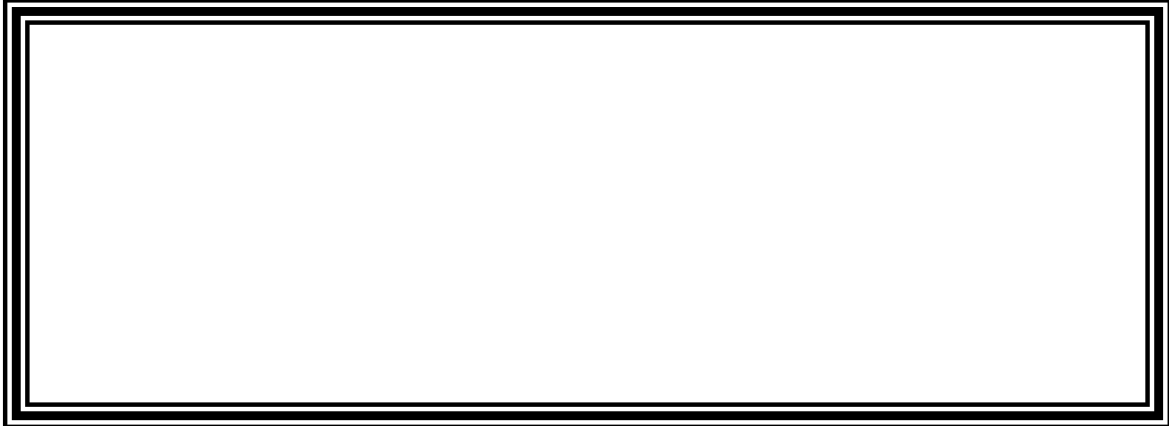
# APPENDIX K: Overview of the Review Process



\* HSD = Head of the Service Division  
 \* PVC = Pro Vice-Chancellor



APPENDIX M: Template for place cards holders (QAU have these)



**APPENDIX N: Confidentiality notice for insert in Panel folders.**

Please remember that all information pertaining to the Review is confidential. Please either return to the Secretary or dispose of appropriately once the report is finalised. This includes all electronic material.

Thank you for your attention to this.

## APPENDIX 0: Register of past Review Secretaries

(Previous two years only listed here)

2011

<b>Review</b>	<b>Secretary</b>
Distance Learning Geology Media, Film & Communication Te Tumu Microbiology & Immunology Toroa College University Information Centre Psychology PhD Programme	Annabel Rutherford, Quality Advancement Unit
Aquinas College Disability Information & Support Master of International Studies Economics Music and Theatre Studies Surveying Tourism Uniprint	Chriss Hamilton Quality Advancement Unit
Maori Centre Knox College	Megan Wilson, Quality Advancement Unit
Postgrad Programmes in Public Health	Kez Wallis

2010

<b>Review</b>	<b>Secretary</b>
<b>Academic Committees</b> <b>CSAFE</b> <b>Dietetics Programme</b> <b>Executive Programmes</b> <b>Graduate Research Services</b> <b>HEDC</b> <b>Physiology</b> <b>Student Health Services</b>	<b>Annabel Rutherford, Quality Advancement Unit</b>
<b>BCom programme</b> <b>Biochemistry</b> <b>Carrington College</b> <b>Marketing Services</b> <b>School of Physical Education</b> <b>Student Administration</b>	<b>Chriss Hamilton, Quality Advancement Unit</b>
<b>Computer Science</b>	<b>Kirsten Eyre (no longer at University)</b>
<b>BA Programme</b>	<b>Keziah Wallis, Information Technology Services (ITS), Management Support Services</b>
<b>Centre for Postgrad Nursing Studies (Chch)</b>	<b>Fiona Bellinger (no longer at University)</b>
<b>Postgrad Programmes in Medical &amp; Health Sciences</b> <b>Facilities Management</b>	<b>Megan Wilson, Quality Advancement Unit</b>
<b>Obs &amp; Gynae (Wgtn)</b> <b>Surgery &amp; Anaesthesia (Wgtn)</b>	<b>Ann Thornton, Review Secretary, Wellington</b>
<b>Proctor's Office</b>	<b>Sarah Lines, PA to DVC (A&amp;I)</b>
<b>Research &amp; Enterprise</b>	<b>Leonie McGeady, Group Leader, Examinations Office</b>
<b>Unicol</b>	<b>Kathryn Williamson, EA to Director, Academic Services</b>

## APPENDIX P: Review Venues and meeting rooms

### Review Venues and meeting rooms for pre-review Panel meetings

<b>Review Venues</b>	<b>Location</b>	<b>Contact</b>	<b>Phone</b>	<b>Catering</b>	<b>Facilities/notes</b>
Academic Common Room, St Margaret's	Leith St Central	Lynda Hartstonge Conference Manager	479 5540 conference@smc.ac.nz	Yes	All. Preferred venue.
Billiard Room	Staff Club	Kate Cooper, Staff Club Manager	021 279 5311 kate.cooper@otago.ac.nz	Yes	Convenient but noisy, no dp, no copier. Use for non-complex reviews eg Colleges/Admin
Leith Room	Staff Club	Kate Cooper		Yes	Very small – only suitable for small panel. Facilities as for Billiard Room. Not noisy though.
Green Room, Cumberland College	Cumberland St	Peter Walker, Head of College	5574 pr.walker@otago.ac.nz	Yes	All. Very helpful. 2 parking spaces available – ask Peter. Green Room backs on to one way system so can be bit noisy (and rescue helicopter!). Convenient for Clinical staff, Marine Sci, Surveying.
Abbey College	Castle St	Gretchen Kivell Head of College	4892 gretchen.kivell@otago.ac.nz	Yes	All – Suggest liaise directly with kitchen staff on catering. Parking available. Off campus so only suitable to some reviews. 3 different venues available. \$150 per day approx. in house catering.
Selwyn College <u>N/A 2 weeks prior and during exam periods</u>	Castle Street	Sandra Sutherland	477 3326 office.selwyn.otago.ac.nz	Yes	Good size meeting room with own kitchenette, toilets, entrance/exit. Waiting area adjacent. In house catering. Wireless. Copier access. \$90 per day. <u>Out of use 2 weeks prior and during exam periods.</u>
University College <u>N/A in exam periods</u>	Union Street	Karen Fazakerley	X5504 <a href="mailto:Karen.fazakerley@otago.ac.nz">Karen.fazakerley@otago.ac.nz</a>	Yes	Board room, Wireless, copier access. Waiting area downstairs. In house catering. \$245 per day
Commerce Divisional Board Room	Commerce	Jenni Wright Operations Coordinator	8149 jenni.wright@otago.ac.nz	No	Great space – internet access, no copier access. Will have to request downstairs in reception. Side room available for waiting/group meetings. Do not provide any glasses/crockery etc. Have to clear

					up and load dishwasher at end of day. Check about rubbish removal.
Committee Rooms 1 & 2 Central Library  <u>Access 8:30 – 4:30pm only</u>	First floor library	Val Fisher Library Administration Manager	8931 val.fisher@otago.ac.nz	No	Good space – kitchen in both rooms. Some glasses and crockery. Request copier access just outside. Have to clear up at end of day.
Seminar Room, Centre for Innovation	Cnr St David's/Castle	Claire Dickie Tenant Services Administrator	8469 claire.dickie@otago.ac.nz	No	Not tried yet but looks to be good space with good facilities. Check on crockery etc.
Octagonal Room	Hospital	Sonya Boereboom PA to the Dean, DSM	5118H dsm.dean@otago.ac.nz	Yes	Good facilities, copier access in DSM round corner. Bit claustrophobic as have to have blinds drawn for confidentiality. But convenient for hospital based departments. Hospital will cater for you.
Board Room	College of Education	Michelle Byers (timetables)	5499 michelle.byers@otago.ac.nz	No	Not tried yet. No wireless access but ports available, DP, request copier access. Waiting rooms & kitchen access with crockery etc available. Need to clear up food things. Have to book this through Univ timetables but College will charge for it \$90 per day.
<b>Meeting rooms – for pre-review panel meetings</b>					
Leith Room Billiard Room	As above				Suggest you use this if available. You can order tea/coffee on arrival and charge to the Review code.
Committee Room North	1 <sup>st</sup> floor, Registry	Judith Thompson PA to the Registrar	8250 <a href="mailto:judith.thompson@otago.ac.nz">judith.thompson@otago.ac.nz</a>  to order tea/coffee contact Rhonda Bzsika on x 8201  <a href="mailto:registry.bookings@otago.ac.nz">registry.bookings@otago.ac.nz</a>	Tea/coffee	You will need to tell Judith what the meeting is for. Rhonda ext 8201 will provide tea/coffee for your meeting at no charge – if group is under 10 people. Be aware that your meeting may be moved to make way for more important ones!!

## APPENDIX Q: Restaurants

These restaurants take University purchase orders, are popular choices with Review Panels and are just an example of venues we have used. Your convenor may have a preference – we suggest something that is nice but not outrageously priced. Restaurants we use regularly:

Plato (open on Sunday)

2 Birch Street

Tel: 477 4235

Can be noisy as it is very popular (especially with University staff!), so not good if you have lots of confidential things to discuss.

Customhouse Restaurant (open on Sunday)

Cnr Wharf & Fryatt Streets

Tel: 477 1950

Glass section is nice for the views for visitors.

Table 7

Cnr George & Hanover Streets

Tel: 477 6877

Scotia

199 Stuart St

Tel: 477 7704

[www.scotiadunedin.co.nz](http://www.scotiadunedin.co.nz)

The Palms [www.palmsrestaurant.co.nz/](http://www.palmsrestaurant.co.nz/)

Phone: 03 477-6534

If you need to discuss sensitive issues over the dinner, The Palms have a private dining room which you can book.

The Staff Club may also be able to cater for dinner on request, and you could use the Leith Room.

## APPENDIX S: Resources and Key Contacts List

### Review Guidelines and Processes

Student/Graduate Opinion Surveys; Course Experience Questionnaire (CEQ)

*\*For enquiries and clarification of Review Processes*

*\*Refer also to [www.otago.ac.nz/quality/](http://www.otago.ac.nz/quality/)*

Megan Wilson (Reviews)	ext 6528	<a href="mailto:m.wilson@otago.ac.nz">m.wilson@otago.ac.nz</a>
Romain Miroso (Surveys)	ext 8726	<a href="mailto:romain.miroso@otago.ac.nz">romain.miroso@otago.ac.nz</a>

### Planning and Funding Office

The Planning and Funding Office facilitates planning within the University, and meets the University's key obligations in reporting information to government agencies for planning, funding and statistical purposes. The office is a useful first point of contact for general information on the University.

*\*Key roles include:*

- Providing a planning framework and support for the University.
- Preparing key corporate documents for the University community.
- Dealing with external government agencies in regards to policy and operational matters.
- Providing EFTS enrolment, other statistical information and analysis for the University community.

*\*Key services include:*

- Providing a range of EFTS based data (and some headcount information)
- Providing EFTS funding advice.
- Providing general University statistics.

*Planning and Funding Contact Details*

Naomi Weaver:	ext 4955	<a href="mailto:naomi.weaver@otago.ac.nz">naomi.weaver@otago.ac.nz</a>
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### Annual Report

[http://www.otago.ac.nz/about/official\\_documents](http://www.otago.ac.nz/about/official_documents)

### Quality Portfolio

<http://www.otago.ac.nz/quality/docs/OtagoAuditPortfolio06.pdf>

### Strategic Directions to 2012

[http://www.otago.ac.nz/about/official\\_documents](http://www.otago.ac.nz/about/official_documents)

### University of Otago Charter

[http://www.otago.ac.nz/about/official\\_documents](http://www.otago.ac.nz/about/official_documents)

### Student Charter

[http://www.otago.ac.nz/about/official\\_documents](http://www.otago.ac.nz/about/official_documents)

## Academic Services Project Office

The Academic Services Project Office is the home of Datamart. Datamart is a very large collection of registration or enrolment data about individual student registrations from 1994 to the current year. It is automatically updated nightly and is structured to facilitate flexible reporting. Statistical information can be split in many ways, e.g. programmes and combinations of programmes (including majors and minors), papers; student analysis by age, gender, ethnicity, and more. Departments are welcome to get in touch if any information that falls within the above capabilities is required.

### *Project Office Contact Details*

Marj Wright:	ext 5692	<a href="mailto:marj.wright@otago.ac.nz">marj.wright@otago.ac.nz</a>
Tracey Neville:	ext 4126	<a href="mailto:tracey.neville@otago.ac.nz">tracey.neville@otago.ac.nz</a>

## Publications/Outputs Office

The Publications/Outputs Office collects and records research outputs to showcase the University's achievements and provide relevant and timely information for a variety of essential reporting requirements such as annual reports, department reviews, accreditation requirements, funding applications.

Citation lists and statistics in various styles and for various time periods can be provided by the Publications/Outputs Office for use in departmental reviews and accreditation processes. Please contact the Publications/Outputs Office with your specific requirements.

The publications/outputs are also available for viewing at <http://www.otago.ac.nz/researchpublications/>

For information about publications/outputs see: <http://www.otago.ac.nz/research/otago005115.html>

### *Publications/Outputs Office Contact Details*

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