

The following documents can provide insight into your unit and are a helpful starting point for reviewers. Center responsibility for providing documents. Can your center/institute provide the following documents to inform a review?

Organizational & Governance Documents

Mission & Vision Statement

Yes

No

We are hoping the review will inform development of this

Strategic Plan

Yes, we can share current and past plans

We can share our current strategic plan

No

We are hoping the review will inform development of this

Organizational Chart

Yes

No

University Affiliation & Reporting Structure

Yes

No

These are not formally documented at this time

Governance Documents (bylaws, advisory board structure, etc.)

Yes

No

Not Applicable

Staffing & Human Resources Documents

Staff Roster & Roles

Yes

No

Job Descriptions & Organizational Responsibilities

Yes

No

Workload Distribution (staffing levels/faculty contributions)

Yes

No

Partial

Programmatic & Impact Data Documents

Strategic Plans

Yes, we can share our current and past plans

We can share our current strategic plan

No

We hope the review will help develop this

Performance Metrics & KPIs

Yes

No

We hope the review will help develop these

Programmatic & Impact Data Documents Continued

Project & Program Summaries

Yes
No
We hope the review will help develop these

Client & Community Partner Lists

Yes
Partial
No

Evaluation & Assessment Reports

Yes
No
We hope the review will help develop these

Impact Assessment Data

Yes
No
We hope the review will help develop this

Financial & Funding Information Documents

Budget Documents

Yes, our center can provide
We will need to request from the university
No

Revenue Model & Funding Diversity Overview

Yes, our center can provide
We will need to request from the university
No

Financial Sustainability Plan

Yes
No
We hope the review will help develop this

Grant & Contract Portfolio

Yes
No

Marketing & Communications Documents

Marketing & Outreach Strategy

Yes
No
We hope the review will help develop this

Website & Social Media Analytics

Yes
No

Newsletters, Press Releases, & Media Coverage

Yes
No

Stakeholder & Community Engagement Reports

Yes
No

University & External Context Documents

University Strategic Plan

Yes, we have access to and are able to share

No, we lack access or permission to share

Accreditation Reports & Compliance Documents

Yes, we have access to and are able to share

No, we lack access or permission to share

Benchmarking or Comparative Data (peer institutions)

Yes, we have access to and are able to share

No, we lack access or permission to share

Miscellaneous & Additional Documents

In addition to the documents listed above, you may consider submitting any of the following to help support the review

- Relevant University Policies
- Stakeholder & Partner Feedback (surveys, letters of support)
- Internal Memos or Reports on Major Transitions
- Any Previous External Reviews or Self-Studies
- Other Relevant Documents (as needed)

In addition to this form, please complete the Peer Institutional Review Intake Worksheet

Please return completed intake form and any supplemental responses to Ashley Labosier
(labosier@sog.unc.edu)