Welcome to this presentation brought to you by the Office of Institutional Effectiveness at Bowling Green State University. Let’s say that your program is undergoing program review and is asked to compile a self-study accompanied by supportive evidence. You ask: “Where should I upload and submit all these program review materials?” At BGSU, we have adopted Trello, a Microsoft app, embedded in the Program Review Teams portal. In this presentation, we will walk through some of the basic features of Trello you will need to become familiarized with for successful submissions.

First, a bit more about Trello. Trello serves as a project management tool which keeps users fully informed about task assignments, due dates while allowing them to visualize the entire mapping of their program review project and effortlessly maneuver individual tasks at different stages of completion. Trello is a simple, customizable, highly intuitive, and user-friendly platform that allows for increased collaboration, the automation of workflow and the ability to monitor progress made by any individual program throughout the program review process. Trello’s notification system is exemplary. It informs users about every action within the software – from updates to comments and task removals – with email notifications and push alerts for mobile users. Finally, Trello operates in real-time, ensuring seamless collaboration. Any update is instantly reflected across the system, eliminating delays, and keeping all members on the same page.

Once your program has been scheduled to undergo a program review, the Office of Institutional Effectiveness will set up a Teams platform with a pre-built embedded Trello board for your convenience. Let us see what this looks like. An easy way to access the Program Review Teams tile is through your BGSU Outlook email. On the left corner of your screen, click on the Microsoft Apps menu and select Teams. Once on your Teams dashboard, look for the O365-OIE Program Review tile and click on it to open.

On this screen, you see many channels in the left column. This page will look slightly different on your end. You will see only your channel. OIE has access to all program review pages for any programs at BGSU. These channels are set as “private” – meaning that only assigned members will be able to access and view self-study and other program review materials that have been uploaded by the program coordinator and faculty. In addition to your private channel, under the “General” page”, you will find several tabs at the top: The “Post” tab allows you to post comments, thus archiving your program review communications in this centralized station rather than randomly through accumulating emails in your BGSU Outlook inbox. The next tab, “Files”, is used to upload your critical program review prep documents. These include: your Memorandum of Understanding (MOU), Approval of External Reviewers and any Self-Study Approval Status Letter (SSASL) you would have received from the Office of Institutional Effectiveness to improve your self-study. The third tab will take you to your Trello board where the bulk of your program review materials will reside.

Let’s take a look at the History/Philosophy/Political Science program review cluster’s Trello Board. As you open your Trello board, you will see three columns: To Do, Doing and Done. These columns will be pre-filled with individual cards, each with a specific task or assignment and its due date. Let’s enlarge our board for a fuller picture. As you make progress on any of the assigned tasks, you will find that you can easily move it from the TO DO to the DOING or DONE column by simply clicking, holding, dragging and dropping. Due dates will have been prefilled for you and serve as a reminder. You may receive alert notifications when a task due date is approaching. Instructions for the task are also pre-uploaded for your convenience. Simply click on the small lines to access them in a smaller window. For example, here we read that the Response to the External Reviewers’ Findings task consists in this: “Once the cluster/department has reviewed findings from the external reviewers, please complete and upload the attached "Program Review Response to External Reviewers Template". Close out when done. You will notice a small clip on any single card. These allow you to upload any supportive evidence or documents. With the smaller window opened, click on “attachments” in the right column”. There is no limit to the size of your attachments. At the bottom of this window, you may choose to enter comments on this specific piece of evidence. For example, a note indicating that this is data retrieved from the Office of Institutional Research or perhaps a note indicating that this evidence was reviewed and vetted by the faculty. You may upload different types of attachments: PDFs, ZIP folders, WORD documents, photographs, embedded URLs, etc.

Back to your board, you will notice an “Add a Card” at the bottom of each column. Since this platform is pre-built for you, there will be no need to add a task. Adding new members to a project in Trello is simple. The Office of Institutional Effectiveness will have already entered the name of the program review coordinator, selected faculty, and associate dean or dean of the respective college. Once you become a member, you will receive a notification from Trello that this is so. Be sure to check your BGSU email address (and your junk folder) for the invitation to accept access to the Board. Because membership is linked to app pricing, only OIE has oversight of the number of members entered at any given time. Though you will not be able to enter any new members on your own, do reach out to the Office of Institutional Effectiveness should the need arise.

The beauty of Trello is that it will allow you to create a link to be shared with your external reviewers, thus eliminating for them the need of SSO. Again, OIE will enter their email addresses for you and generate the link to be shared as needed. Once the external reviewers have submitted their report of findings and Executive Summary, the link will expire.

We hope this brief presentation has been helpful to you. For questions and/or technical assistance with your Teams/Trello platform, do not hesitate to contact the Office of Institutional Effectiveness at institutionaleff@bgsu.edu