**Initial Self-Evaluation Report (Accounting) Outline and Guidelines**

**Philosophy and Expectations**
The initial Self-Evaluation Report (iSER) is a strategic management plan that is also attentive to satisfaction of accreditation standards. The process of creating the iSER should naturally flow from, and be part of, the ongoing strategic management process.

A long-standing problem with many iSERs is that they focus solely on closing gaps between current conditions and the conditions necessary to satisfy accreditation standards. An internally generated iSER that is built on the accounting academic unit’s particular circumstances is most likely to yield sustained continuous improvement. The goal of the accreditation process regarding strategic management is a differentiated mission based on strategic thinking, and a plan for implementing the mission while closing existing gaps between conditions at the institution and the accreditation standards.

There is a 50-page limit for the iSER (accounting) excluding tables and appendices.

**Objectives and Content**

The iSER should show how the unit will address its areas for improvement during the initial accreditation process and how the unit will maintain continuous improvements in its program. The report outlines what gaps need to be closed to meet AACSB standards expectations and how current activities meet the expectations of the standards, which ones, and how.

The iSER should:

* Lead to a performance level that satisfies AACSB accounting accreditation standards.
* Demonstrate that the resources necessary to align with the accounting standards will be available.
* Show how these resources will be managed to reach that performance level.

The report should reflect two levels of analysis. The first level should identify areas of strength and areas for improvement in each standard. The second level should formulate an action plan for addressing weaknesses. The action plan must identify specific improvement activities and establish a timetable for the completion of each. It should also address the resources, the individual(s) responsible for each activity, and an anticipated completion date.

**Accounting iSER Guidelines**

The iSER includes the following 4 requirements:

1. Executive Summary
2. Profile Sheet
3. Accounting Accreditation Unit Strategic Plan
4. Standards and Tables (Accounting Tables A2 and A6 and Business Tables 2-1, 3-1, 3-2, 5-1, 8-1)
	1. *Note: If unit is pursuing initial accreditation concurrently with initial business accreditation or with a CIR business review, the above business tables are NOT required as part of the accounting iSER*
5. Optional addendum items

**NOTE: There is a 50-page limit for Section D documentation.** (Tables are not included in 50-page limit)

**A. Executive Summary** The AAC requires you to prepare and submit a three to five-page Executive Summary.

The Executive Summary should include the following:

1. A one-paragraph to one-page statement and written description of your mission and objectives;
2. Written descriptions of the processes that support achievement, the outcomes and measurements associated with those processes, and how the processes and objectives may have changed as a result of your efforts;
3. Describe the most significant strategies and outcomes related to engagement, innovation, and impact. Examples should include the outcomes linked to the accounting mission and strategic plan. (For additional information, please refer to Page 10 in the [2020 Guiding Principles and Standards for AACSB Business Accreditation)](https://www.aacsb.edu/accreditation/standards/business.)
4. A written summary of self-assessed strengths and weaknesses as they relate to AACSB International’s standards and the achievement of specific objectives;
5. How the unit’s strategic plan relates to your mission development activities; and,
6. A description of the accounting unit’s strategy around diversity and inclusion and how the unit seeks to represent diverse people and ideas.
7. A written section listing up to five effective practices, which are unique or inherent to the success of your operations.

**B. Application Profile Sheet**

In addition to the iSER, the unit should prepare and submit a profile sheet. The AAC uses the profile sheet as a brief overview and reference document in their review. The template for the profile sheet is located on the AACSB [[website](https://www.aacsb.edu/educators/accreditation/accounting-accreditation/initial-accreditation).](https://www.aacsb.edu/accreditation/journey/accounting/initial)

**C. Accounting Accreditation Unit Strategic Plan**

Please provide the unit’s strategic plan. The Strategic Plan is not included in the page limit for the iSER.

**D. Standards and Tables**

The format for each standard must begin with the table below and is followed by the supporting documentation.

|  |  |
| --- | --- |
| Standard number: (Example A1, A2, etc.) |  |
| Alignment with Standard (Yes/No): |  |
| Response:  |  |
| Actions to be implemented: |  |
| Person(s) responsible: |  |
| Financial resources: |  |
| Timeline: |  |

**E. Optional Addendum Items**

The unit may include supplemental documentation into an addendum. Examples may include AoL artifacts, CVs, and any other pertinent information.

**REPORT AND APPENDICES SUBMISSION GUIDELINES**

* The iSER and accompanying documentation must be submitted via myAccreditation by the designated due date reflected in myAccreditation. If submitting for an earlier AAC meeting, please refer to the AAC meeting and submission dates found [here](https://www.aacsb.edu/educators/accreditation/accreditation-committees/accounting-accreditation-committee).
	+ Upon submission of your documents via myAccreditation, you will receive an immediate display notification in a green banner, “The project was successfully submitted.” In addition, your iSER project status will move from “Not Submitted” to “Submitted”.
* It is the school’s responsibility to share a draft iSER with the mentor, if applicable, for input prior to submission to AACSB. The school should ensure the draft is provided to the mentor early enough to allow sufficient time for the mentor to review and send feedback to the school in advance of the due date. The general recommendation is to send the report to the mentor for input *no later than three weeks* prior to the due date.
* Should you have any questions, please reach out to your AACSB staff liaison, which is displayed in myAccreditation on the Contacts tab.