## Change of Control Evaluation Visit to Lead University and Secondary College

The following sample schedule is provided as an aid in scheduling of meetings as required for HLC Change of Control Evaluation visits. The draft presupposes a merger between two institutions. However, Changes of Control can take many different forms. This sample should be modified to accommodate and address the circumstances of each specific Evaluation visit, including for example, locations to be visited, parties involved, travel schedules, and in-person versus technology mediated participation.

### HLC Change of Control Evaluation Team Members

Peer Reviewer Number 1, Title, Institutional Affiliation
Peer Reviewer Number 2, Title, Institutional Affiliation
Peer Reviewer Number 3, Title, Institutional Affiliation
HLC Liaison, Title
HLC Liaison, Title

### Month, Day, Year (e.g., July 1, 2023)

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| 6:00 p.m. | Team Hotel | **Change of Control Evaluation Team Orientation/ Private Team Dinner/Preparation Meeting** |

### Month, Day, Year

|  |  |  |
| --- | --- | --- |
| 8:00–8:50 a.m. | Location: TBD | **Meeting with Lead University Executive Leadership** *Change of Control Evaluation TeamLead University President/CEOLead University Chief Academic OfficerLead University Chief Student Affairs OfficerLead University Chief Financial OfficerLead University Additional Appropriate Staff Lead University Additional Appropriate Staff Lead University Additional Appropriate Staff Lead University Additional Appropriate Staff*Topics to include the timeline for implementation of the transaction, student support, governance of the new programs, and additional topics/issues unique to this transaction. |
| 9:00–9:50 a.m. | Location: TBD | **Meeting with Lead University Board of Trustees or Representatives of the Board***Change of Control Evaluation TeamLead University, President/CEOLead University, Board ChairLead University, Board Vice ChairLead University, Board SecretaryLead University, Board MemberLead University, Board MemberLead University, Board Member*Topics to include background and purpose of transaction, structure and operations following the transaction, planning for the future, and additional topics/issues unique to this transaction. |
| 10:00–10:50 a.m. | Location TBD | **Meeting with Lead University Legal Counsel/Regulatory Affairs/Accreditation Compliance, Finance and Selected Relevant Staff***Change of Control Evaluation Team|Lead University Legal CounselLead University Chief Financial OfficerLead University Additional Appropriate Staff* Topics to include legal structure of transaction, communications with U.S. Department of Education, communications with state higher ed authority, financial support for transaction, planning for the future, and additional topics/issues unique to this transaction. |
| 11:00–11:50 a.m. | Location: TBD | **Meeting with Lead University Academic Leadership***Change of Control Evaluation TeamLead University Chief Academic OfficerLead University Additional Appropriate Staff Lead University Additional Appropriate Staff* Topics to include program review, assessment, plan for integration of programs and services, and additional topics/issues unique to this transaction. |
| 12:00–12:50 p.m. | Location: TBD | **Private Team Lunch***Change of Control Evaluation Team* |
| 1:00–1:50 p.m. | Location: TBD | **Open Meeting with Lead University Faculty***Change of Control Evaluation TeamLead University Faculty* |
| 2:00–2:50 p.m. | Location: TBD | **Meeting with Lead University Admissions, Student Affairs and Student Support** *Change of Control Evaluation Team Lead University Chief Enrollment OfficerLead University Academic Advising StaffLead University Career Services StaffLead University Representatives from other Student Support Service Units*Topics to include plan for integration of programs and services, adequacy of resources and additional topics/issues unique to this transaction. |
| 3:00–3:50 p.m. | Location: TBD | **Open Meeting with Lead University Students** *Change of Control Evaluation TeamLead University Students* |
| 4:00–4:30 p.m. | Location: TBD | **Private Team Meeting** *Change of Control Evaluation Team* |
| 4:30 p.m. |  | **Team Departs for Dinner/Evening Meeting** |

### Month, Day, Year

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| --- | --- | --- |
| 8:00–8:50 a.m. | Location: TBD | **Meeting with Secondary College Executive Leadership***Change of Control Evaluation TeamSecondary College President/CEOSecondary College Chief Academic OfficerSecondary College Chief Student Affairs OfficerSecondary College Chief Financial OfficerSecondary College Additional Appropriate Staff Secondary College Additional Appropriate Staff Secondary College Additional Appropriate Staff Secondary College Additional Appropriate Staff* Topics to include the timeline for implementation of the transaction, student support, governance of the new programs, and additional topics/issues unique to this transaction. |
| 9:00–9:50 a.m. | Location: TBD and/or conference call | **Meeting with Secondary College Board of Trustees or Representatives of the Board***Change of Control Evaluation TeamSecondary College President/CEOSecondary College Board ChairSecondary College Board Vice ChairSecondary College Board SecretarySecondary College Board MemberSecondary College Board MemberSecondary College Board MemberSecondary College Board MemberSecondary College Board Member*Topics to include background and purpose of transaction, structure and operations following the transaction, planning for the future, and additional topics/issues unique to this transaction. |
| 10:00–10:50 a.m. | Location: TBD | **Meeting with Secondary College Legal Counsel/Regulatory Affairs/Accreditation Compliance, Finance and Selected Relevant Staff***Change of Control Evaluation TeamSecondary College Legal CounselSecondary College Chief Financial OfficerSecondary College Additional Appropriate Staff* Topics to include legal structure of transaction, communications with U.S. Department of Education, communications with state higher ed authority, financial support for transaction, planning for the future, and additional topics/issues unique to this transaction. |
| 11:00–11:50 a.m. | Location: TBD | **Meeting with Secondary College Academic Leadership***Change of Control Evaluation TeamSecondary College Chief Academic OfficerSecondary College Additional Appropriate Staff Secondary College Additional Appropriate Staff Secondary College Additional Appropriate Staff Secondary College Additional Appropriate Staff* Topics to include program review, assessment, plan for integration of programs and services, and additional topics/issues unique to this transaction. |
| 12:00–12:50 p.m. | Location: TBD | **Private Team Lunch***Change of Control Evaluation Team* |
| 1:00–1:50 p.m. | Location: TBD | **Open Meeting with Secondary College Students** *Change of Control Evaluation TeamSecondary College Students* |
| 2:00–2:50 p.m. | Location: TBD | **Meeting with Secondary College Admissions, Student Affairs and Student Support Services***Change of Control Evaluation Team Admissions AdvisorsCenter for Student Success/Student Success AdvisorsCareer ServicesFinancial AidVeterans Affairs/Military Assistance Center*Topics to include plan for integration, adequacy of resources, and additional topics/issues unique to this transaction. |
| 3:00–3:50 p.m. | Location: TBD | **Open Meeting with Secondary College Faculty***Change of Control Evaluation TeamSecondary College Faculty* |
| 4:00–4:30 p.m. | Location: TBD | **Exit meeting with Senior Executive Teams of Lead University and Secondary College** |
| 4:30 p.m. |  | **Team Departs**  |