

## Hosting Effective Accreditation Virtual Site Visits

The beginning of 2020 presented many unexpected challenges that brought about a sea change in how we work, meet, and conduct business together. Accreditation was no exception. Although technology is not new to most accreditors, the application of technology to conduct virtual, high stakes site visits was uncharted territory. Further, online collaboration is not new to Educator Preparation Providers (EPPs) offering online preparation programs. Moving to a virtual modality poses pitfalls as well as promising practices to consider when efficiency and effectiveness are essential to the fidelity of the process. The Council for the Accreditation of Educator Preparation (CAEP) and an online EPP teamed up to exchange ideas and “tips” on conducting virtual accreditation visits. Their cross-functional collaboration revealed insights across four broad areas of focus: Pre-meeting Planning, Rules of Engagement, Logistics, and Troubleshooting.

### **Pre-meeting planning: Setting the stage**

The devil is always in the details and for a successful virtual visit the details are what can make or break the visit. CAEP has conducted more than 100 site visits from Spring 2020 thru Spring 2021. CAEP created a flowchart of activities and best practices for site visit teams and EPPs to use as a guide to support EPPs in their preparation. (See flowchart attachment).

The schedule of events during a site visit is critical and needs to be very detailed. The hosting EPP should create a standard onsite schedule and then provide explicit details about times, virtual platform requirements, logins, and anticipated participants. There is no mechanism for taking social cues or reminders from teammates as they walk down the hallway about where to go or what meetings are happening. Everything needs to be in the schedule. The most successful virtual visits include break times (bathroom/meals), virtual check-in times for lead and EPP, and scheduled review teamwork “blocks” in addition to the scheduled interviews and focus groups. The hosting EPP should include the name of each participant on the schedule for each event and distinguish which events are for site visitors and which group of participants.

Build time into each interview/focus group for introductions, technology issues with audio or video, and to review online etiquette. Entrances and exits from physical meetings and/or the presence of an escort usually signaled to interviewees and team members that an interview session was coming to a close. Not so easy when you are online and interviewees (and maybe even team members) arrive late or encounter technical issues in logging into the video conference. Despite possible slowdowns, always begin on time with introductions. This allows interviewees to join during introductions in the first 5 minutes of the meeting. Even if the question-and-answer portion of the meeting started later than planned, begin to wrap-up the interviews at least 10 minutes before the next meeting. In addition to personal breaks, team members need transition time to log out of one meeting and into the next. The ten-minute buffer between meetings is essential.

Another best practice idea for multiple day reviews is to schedule a few extra virtual sessions at the end of each day. These sessions are a formal part of the schedule but are labeled as TDB or OPEN time to be utilized if the site team requires additional interviews or focus groups. Re-planning for end-of-day scheduled sessions with an open agenda helps EPPs and the review teams keep those times

available if needed. For example, one EPP during a recent visit experienced a power outage as thunderstorms rolled through. They lost 25 minutes from a session earlier in the day. The open, end-of-day session was used to follow-up on any unresolved questions from the interrupted session. If the team does not need to use the open sessions, then the meetings can be canceled at the end of the day.

### **Establishing rules of engagement: Etiquette and norms**

This section on norms and etiquette may seem unnecessary. However, the virtual space can sometimes elicit a more informal approach. Therefore, it is up to the accreditor to set clear reviewer expectations. On the attached flowchart a dispositions section was added to capture some common examples based on previous virtual visit feedback. Reminders may be needed for site visit teams that a virtual visit is a site visit and should be handled as professionally as a face-to-face onsite visit. Professional attire is required. A virtual visit does not mean attending dressed in an old tee shirt with a rock band logo. Joining meetings from a quiet professional space means conducting interviews with minimal interruptions. Joining a meeting with a computer set up at the kitchen table near the back door with people coming in and out is very distracting. Interviews should be conducted, and attended, while stationary. Interviewing or being interviewed while walking one's dog, driving a car, or walking on a treadmill are distracting to everyone and conveys an unprofessional message.

Site reviewers must exercise caution in making assumptions about the participants they are interacting with in the groups. As such, when engaging in conversations before the start and after the conclusion of a session it is important to keep the "small talk" narrowly focused. Similar to a dinner party with unknown participants, you would want to steer clear of conversations about politics, religion, and/or personal relationships. This could lead to micro-/macro-aggressions or feelings of discomfort on the part of the participants which may dissuade them from being open to answer questions about the EPP.

A distraction specific to virtual meetings is the misuse of the background screens. Granted it is interesting and funny to a point to try out the variations in backgrounds. However, constantly changing backgrounds can be distracting and unprofessional. At a recently hosted meeting one of the attendees had this feature running. After a few minutes of levity it became inappropriate and distracting. Before joining a meeting, select an appropriate background and stick to it for the duration of the visit.

### **Logistics: Making the most of the (virtual) time you have**

Logistics may appear to be as simple as setting up a meeting on a video conferencing platform such as Zoom, AdobeConnect, WebEx, or Go To meeting. However, there are some unique considerations when running an accreditation site visit online.

On a traditional CAEP site visit, the accreditation review team usually has an onsite workroom where they can convene throughout the day, exchange ideas, coordinate questions for interviews and establish back-up plans for interactions. It is important to establish a way for these collaborations to happen. Without that physical space, think about how you can set up a way to communicate with team members outside of the interview meeting video platform. For example, during a recent high stake meeting a smartphone group chat was established so that the team could communicate privately. It was very useful to be able to "ping" a colleague to ask a follow-up question or to add a thought without interrupting the flow of interviewee responses to the team's questions. It is important to plan for an efficient method of backchanneling when preparing for a virtual review.

A few best practice items include having the accrediting agency open a virtual workroom for the site visit team. This space should be open 24 hours a day for the entire visit and only available to the site team reviewers. Team members can meet, have confidential conversations, and work in this secure virtual space. The EPP is responsible for setting up the remaining virtual meeting spaces for interviews and focus groups. In addition, the EPP should assure the faculty workspaces are also private where confidentiality can be ensured. All virtual meetings should have a password and/or a waiting room feature, for the EPP, the review team, or the accreditor to control access to the respective meetings.

It is very helpful to have an EPP-assigned person designated as a technology person to support logging in to the meeting and troubleshooting any technology issues that arise at the start of the meeting. Some EPPs and review teams agree to allow the tech support person to stay throughout the meeting. For example, in a recent virtual visit an EPP had a technology person in every meeting. After introductions and making sure all technology issues were resolved they muted themselves and were available for any unforeseen issues. On another visit, technology support was available until introductions were concluded and then the support person logged out of the meeting but provided contact information in the chat box in case of any emerging technical issues. It is important this detail be worked out when preparing the schedule with the review team so that everyone is clear on the role of the technology person and if they will be present in meetings or required to log out.

It is strongly recommended that each session includes two members of the review team. The session lead attends to facilitating the discussion. The session moderator records or checks names of attendees, notates the role each individual plays within the institution, keeps track of questions that may appear in the chat, and alerts the lead interviewer if one or more individuals has “raised a hand” (a function of some video conference platforms). The session moderator can also remind folks of the rules of etiquette if background noise interferes by sending a quick chat message, and so on. An equally important role for a session moderator is to keep the meeting moving along effectively by occasionally announcing the time, such as “Thanks, everyone, we have about XX minutes left. Time enough for another question (or more discussion of X, or to hear from someone else)”. It is important to note the session lead and session moderator roles can vary for each session.

Time management is an underlying element of virtual site visit success. The site review team needs to plan ahead and prioritize questions to ask within a session to ensure that the opportunity to corroborate and verify all that is needed can be done. For example, using a 50-minute meeting, plan for at least five minutes or so for introductions of the team members and the interviewees and five to eight questions with two to three respondents to each question. At a recent site visit we had planned for a minimum of five minutes per question and allowed the final five minutes or so for attendees to ask questions, by asking attendees “Do you have any questions for us?” or, “Is there anything else you would like us to know that we didn’t ask you?”

### **Troubleshooting: What to do when something goes wrong**

Despite your best pre-planning, etiquette adherence, and logistical excellence, there are times when something will go wrong, and will go wrong at the worst possible moment. Here are some recent occurrences that needed resolution:

*What if someone is in the virtual meeting room who shouldn't be there?*

It is best practice to open a meeting with a brief introduction that includes stating who the meeting is for and the purpose of the meeting. If a participant introduces themselves as a student, for example, during a meeting of clinical faculty, you can offer the person another meeting to attend more fitting to their role. Of course, be gracious in stating you look forward to hearing their feedback and insights at the subsequent meeting. If this gentle encouragement does not work, contact EPP personnel, by text or cell, to intervene on the team's behalf.

*What if the internet or audio connection is bad?*

In general, it is best practice to limit meeting attendees to fewer than 25. However, CAEP has found that having no more than ten people on a video call (in addition to team members) maximizes opportunities to talk, to ask follow-up questions, and to verify the information the team needs. Sometimes the interference is a bandwidth issue for the individual's own internet connection. CAEP now requests the EPP have each attendee check their internet speed before the meeting. The EPP's IT personnel can walk participants through this procedure prior to a meeting or they can create a short video tutorial for attendees and share it during the pre-visit.

There are a couple of additional quick fixes for reception difficulties that have proved to be effective. One method is reducing the number of attendees who are on video. Sometimes issues are resolved by asking only the person speaking to use their camera. If there is just one person experiencing difficulties and all other participants report there are no issues, ask the person who is experiencing difficulties to exit the meeting and re-enter. Often the exit and re-enter strategy works for the individual.

*What if an attendee shares or wants to share a doc on screen or in the chat?*

It is not uncommon for interviewees to want to be helpful to the accreditation team. This happens as much in face-to-face visits as in the virtual space. Virtual attendees want to share screens and just "show" you this thing they have that will evidence how the institution is working with partners, or whatever the topic may be. Consider making a general statement at the start of the meeting to inform attendees that relevant documents need to be officially logged in to be considered as evidence. If, however, the "just-let-me-show-you-this" happens during a meeting, thank the individual and refer the person to the accreditation coordinator to log the evidence and formally forward the information to the review team.

### **Post (virtual) Visit Considerations**

In a CAEP accreditation visit, most of the post site visit activities are unchanged from what would occur during a physical, face-to-face environment: deadlines should be met, reports submitted as is routine, and corrections are made. If the decision-making body's meeting is held virtually, all of the best practices and suggestions for pre-planning and during meeting logistics should apply.

Whether or not virtual site visits and/or virtual decision body meetings become a regular feature of the accreditation process or not, the insights shared here have application to many aspects of higher education from online course delivery to faculty, leadership, and governance meetings in general. Admittedly, moving from face-to-face interactions to virtual ones has both advantages and disadvantages. Hopefully, some of the disadvantages are mitigated by the pre-meeting planning, establishing basic agreements about online interactions, handling the nuances of logistics in an online environment, and effectively troubleshooting (or attempting to) the unexpected.

