



## Virtual Site Visits 2020

A virtual site visit works very similarly to one on-the-ground - it is an opportunity for the program to showcase its strengths, the site visit team to confirm and clarify the self-study report, and COPRA to gain insight into each program. As we adapt to the evolving public health outbreak with potential last minute changes to site visit plans, COPRA appreciates the flexibility and creativity of all involved. COPRA is confident that together we will be able to ensure the health and safety of everyone engaged in the accreditation review, as well as successful site visits. See [NASPAA policies](#) for up-to-date information on the evolving situation.

NASPAA staff are available to help answer questions about shifting from an in-person site visit to a partial or full virtual site visit. As we work together to adjust plans, please reference the below for guidance on how to put together a successful virtual visit.

### Transitioning the schedule from in-person to online

1. **Set up a meeting to plan between the Site Visit Chair and program representative.** See how much of the original site visit schedule can be preserved (excluding meals or receptions). Take advantage of time that has already been reserved by stakeholders.
2. **Identify meetings that are easily transitioned to online.** For a typical site visit schedule, this likely includes one-on-one meetings with the program leadership, meetings with university administrators, and those with faculty and staff. Students who were likely to be engaged on campus can be easily linked to the team virtually as well.
3. **Identify meetings that are not easily transitioned online.** Some meetings with external stakeholders like alumni or advisory boards may be scheduled off-campus. These could be shifted to on-campus, or participants could connect individually from their home or office.
4. **Be mindful of time zones.** Be sure you are considerate of the location from which each member of your site visit team may be calling.
5. **Be creative.** If there's a better way to accomplish the goals of a specific meeting, consider it! This could include delaying the site visit from the original dates to accommodate planning needs. Please discuss this option with NASPAA staff first.

### Hosting an online meeting (host program)

1. **Identify the host institution's video-conferencing platform.** Most universities have accounts with online meeting hosts such as GoToMeeting or Zoom. Video-conferencing allows all participants to engage directly with each other, and focus on the conversations. If a platform is not available, please let NASPAA staff know. Be sure to test your conferencing service before the visit begins. *We cannot emphasize enough how important connectivity is to a successful virtual site visit.* Most schools are transitioning to distance learning – take advantage of that effort.

2. **Reserve a visit location.** With an online visit, it is useful to take advantage of a single campus class or conference room set up to connect virtually (with a mounted camera, projection screen, microphones, etc.). Consider having one meeting location for everyone engaging on-campus (with likely exceptions for one-on-one meetings, including with the provost or dean).
3. **Involve your IT staff:** Designate one person to coordinate the online platform, help orient each new group to the online setup, and troubleshoot. This could be someone from IT or an administrative staff member who is already familiar with the online meeting platform.
4. **Ensure all participants have all information needed to be prepared for the online meeting** - we suggest both emails and calendar invites with the video link and any additional information required to access the meeting (phone numbers, meeting passwords).
5. **Limit invites to essential attendees.** It can be more difficult to direct a conversation in a virtual meeting, especially with participants talking over each other. Consider this as you adapt your in-person schedule to online.
6. **Be present.** It is tempting to multitask during an online meeting - we have all done it! - but please be sure all participants are focused on the conversations. As the situation allows, NASPAA recommends gathering all university-based participants in a single, quiet room to limit distractions. Treat those on the screen the same as you would in person - keep your eye on the camera, speak clearly, don't interrupt.

#### **Facilitating an online meeting (site visit team)**

1. **Plan in advance.** We are all navigating the changes necessitated by COVID-10 together, and March and April 2020 site visits may present unique challenges in transitioning site visits to online on short notice. Before the visit begins, prepare as a team for how you want to run each meeting, beginning with who starts the conversation and how you will direct it from there. It is important to be on the same page when the team is in disparate locations, making it more difficult to read in-room cues. This is especially important when considering how to engage, as a team, on behalf of the program with university administrators. *If the team needs an online platform for planning, please let NASPAA know.*
  - a. Use your travel day to test the software and meet as a team.
2. **Introduce everyone.** This may take more time virtually, but it is important to build a rapport among all participants. Have a plan for how to introduce the team and your role first.
3. **Build trust.** Be mindful that unlike an in person site visit, the program and team do not have the benefit of making direct connections through informal conversations, introductory meals, body language, etc. If the schedule allows, consider asking everyone in each meeting to share something they particularly like about the program to help break the ice.
4. **Be present.** It is tempting to multitask during an online meeting - we have all done it! - but please be sure the entire team is focused on the visit. Treat those on the screen the same as you would in person - keep your eye on the camera, speak clearly, don't interrupt.
5. **Be direct.** Feedback from teams that have participated in virtual site visits indicates it can be harder to direct the meeting because there's a delay in communication, conversations run long,

or it is harder to read a room you've connected to virtually. To avoid dead air, it may help to pose a question to a specific person and get the conversation rolling.

6. **Share an agenda.** This is an extra step above and beyond the in-person site visit, but it may be useful to share with each group, especially the larger group of faculty, a brief agenda outlining the topics you'll discuss. This helps keep the meeting focused.
7. **Be flexible.** Not everyone will feel as comfortable in the virtual setting. Think about ways to frame questions and connect with individuals to engage all communication types, just as you do in your own classrooms.

### **Engaging stakeholders who may not be on campus**

As an increasing number of campuses remain open but have shifted class instruction to online, impacting the availability of campus stakeholders. Teams and programs should make every effort to engage all stakeholders, including students no longer on campus, virtually. Please take steps to ensure open communication with all those engaged including clear schedule expectations and access to video conference links, conference call numbers, etc.

### **Partial Virtual Visit**

It may be that only 1 or 2 of the site visitors will join the site visit virtually. In that case, be sure that together the team and program discuss the best way to include all site visitors in each meeting. Plans may vary depending on which site visitor(s) is virtual. For full and partial site visits alike, NASPAA recommends identifying one room for all group meetings to occur to simplify technological needs and maximize engagement.

### **Sharing Documents**

An important part of the site visit is sharing documents for the site visit team to review. This is easily done online, especially as many programs have already shifted to using USBs for this part of the visit. Depending on the types of documents, COPRA recommends providing the team access to a special Dropbox, your university's course management system (i.e. Blackboard), or other file sharing site to ensure the team is able to review all pertinent documents. Be sure your file sharing is secure and files are removed and/or access discontinued once the visit is complete.

### **Drafting the Site Visit Report**

As the shift to virtual visits impacts the site visit schedule, please use the site visit report to outline how the site visit changed with regard to meetings, document review, etc. For example, if fewer students are available remotely or if only one team member meets with the Provost, including this information in the site visit report helps COPRA understand how the program and team were able to adapt.

## Seeking Reimbursement

Per [NASPAA policies](#), financial responsibility related to NASPAA site visits ongoing in March-April 2020:

- If a university unilaterally makes a decision beyond guidelines of the CDC or US DOS, the university is responsible for financial consequences of that decision;
- If the US government issues new regulations to limit travel, or the universities relevant to the event adopt similar rules, for NASPAA-sponsored events, NASPAA is responsible for financial penalties of cancellations or delays. **Participants in NASPAA-sponsored site visits should first seek COVID-19 waivers of change fees from airlines/hotels, or claim on their travel insurance.**
- If the site visitor lives in a city or state with a declared emergency should examine the specific directives of that declaration, and if travel or meetings are advised against, the site visitor should act accordingly.

## Reach out to NASPAA!

Staff are here to help make this transition as smooth as possible. We sincerely appreciate your flexibility and are prepared to help troubleshoot, brainstorm, or answer questions. Please do not hesitate to reach out to any of us with questions big or small:

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