MSCHE
MIDDLE STATES COMMISSION
ON HIGHER EDUCATION

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Virtual Site Visits:
A Guide in Response to COVID-19 for Institutions and Teams
March 2020

Slide 1 - Introduction

Narration: Thank you for joining the Middle States Commission on Higher Education for guidance on conducting virtual site visits.

The Middle States Commission on Higher Education continues to be concerned about the coronavirus (COVID-19) pandemic and understands that this is a difficult time for our institutions, all students, faculty, staff, and administration, and for the communities our institutions serve. The Commission has received additional guidance from the United States Department of Education (USDE) outlining temporary flexibility to allow accreditors to substitute on-site reviews with virtual site visits in response to the coronavirus (COVID-19) interruptions. In anticipation of such flexibilities, the Commission had already approved of virtual site visits and communicated with institutions and teams to inquire about their willingness and capacity to host virtual site visits in lieu of on-site visits for spring 2020. The Commission limited the option to host virtual site visits, and virtual site visits were not made available to applicant institutions, institutions on probation, or those institutions with concerns that necessitated on-site review.

This recorded webinar is being provided to address the temporary flexibility provided by the United States Department of Education to address Coronavirus impacted institutions and accrediting agencies. Please note that this recorded webinar is a supplement to training already provided to Team Chairs and peer evaluators and does not negate any previous training.

Slide 2 - Disclaimer

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Narration: Disclaimer

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Slide 3 - Commission Memo: March 13, 2020

Steps Taken

- Virtual site visit options presented
- Institutions evaluated capacity to host virtual site visit
- Team member's willingness and availability assessed

Ensure Integrity of Process

- Virtual activities must be consistent with on-site visit
- Engage constituencies in process
- Interviews to clarify and verify
- Request and upload additional evidence

Narration: The Middle States Commission on Higher Education has been working with the institutions and teams to prepare for the possibility of virtual site visits. Those steps were outlined in a Memorandum to team chairs, team members, institutions, and state and system observers issued on March 13, 2020, and published at the Commission's website. The Commission must ensure the integrity of the evaluation process with a thorough and objective review.

Slide 4 - USDE Guidance: March 17, 2020

- Temporary Flexibility
- Engaged, Interactive Formats
- Follow-up, in-person Visit*

*Subject to further guidance from USDE

Narration: The USDE guidance dated March 17, 2020, and titled Information for Accrediting Agencies Regarding Temporary Flexibilities Provided to Coronavirus Impacted Institutions or Accrediting Agencies, requires that virtual site visits rely on engaged, interactive formats, and may not be solely document reviews and exchanges of emails. The guidance further requires a subsequent follow-up, in-person visit by one or more peer evaluators. The purpose of the follow-up visit is to verify information obtained during the virtual site visit and to comply with statutory requirements. For evaluation visits, the on-site follow-up visits apply to main campuses, branch campuses, and any required additional locations. The Commission is seeking additional clarification from the USDE about such visits and will provide further guidance as it becomes available.

Slide 5 - Preparing for and Conducting the Virtual Site Visit

Preparing for and Conducting the Virtual Site Visit

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Narration: Much of the process associated with preparing and hosting virtual site visits mimics what institutions and evaluators experience during on-site visits. Institutions are still required to ensure team members have the information and evidence they need, and evaluators are expected to conduct interviews so that the virtual site visits include and engage constituencies in the process no differently than if the visit was being conducted on-site. However, there are some aspects of virtual site visits that should be carefully considered, especially those associated with the use of technology, the management of the process, and unique preparations.

Slide 6 - MSCHE Virtual Site Visits

All MSCHE virtual site visits must:

- be grounded in existing MSCHE standards for accreditation, requirements of affiliation, federal compliance requirements, and policies and procedures, specifically Accreditation Review Cycle and Monitoring Policy and Procedures and Follow-Up Visits Procedures,
- adhere to the USDE Guidance, and
- align with the Commission's memos of March 13 and 19, 2020.

At all times:

- the team and the institution should uphold the Commission's expectation of confidentiality;
- the team and the institution should not record any part of the virtual site visit, in any manner or for any reason;
- the team members and institutional representatives should only use messaging features within the meeting platform and not through messaging apps on their personal phones.

Narration: To begin with, all MSCHE virtual site visits must:

- be grounded in existing MSCHE standards for accreditation, requirements of affiliation, federal compliance requirements, and policies and procedures, specifically Accreditation Review Cycle and Monitoring Policy and Procedures and Follow-Up Visits Procedures,
- adhere to the USDE Guidance, and
- align with the Commission's memos of March 13 and 19, 2020.

At all times, the team and the institution should uphold the Commission's expectation of confidentiality; the team and the institution should not record any part of the virtual site visit, in any manner or for any

reason; because the oral exit report is an internal event, external parties, such as the press, are not be invited;

the team members and institutional representatives should only use messaging features within the meeting platform and not through messaging apps on their personal phones.

The next several slides will discuss steps that can be taken to support the virtual site visit.

Institutions

- Upload report and evidence
- Make technological arrangements for teams
- Assign IT staff or other point persons
- Conduct a test meeting to try out technology platform

Team

- Access report and evidence
- Request additional evidence, as needed
- Coordinate interview requests
- Have near complete draft report prepared in advance
- During the Virtual Site Visit

Narration: Activities before the virtual site visit by both institutions and teams are consistent with Commission policy and procedures, USDE Guidance, and recent Commission memos.

Keep in mind that reports and evidence must be uploaded by the institution in accordance with the original timeframe of the on-site visit.

Beginning with visits in Fall 2019, peer evaluators already have been accessing the institution's report and evidence through the secure MSCHE portal so this new practice is beneficial for a virtual site visit. There are no longer resource rooms on campus or at the hotel. When peer evaluators request additional evidence prior to or during the virtual site visit to clarify information or verify compliance, the institution immediately uploads the evidence to the portal and it is available to the team.

Team Chairs should continue to coordinate the interview and evidence requests from team members and share those with the institution. To avoid unnecessary disruptions, each requested interview should be set up as a separate virtual meeting.

Institutions should arrange for team members to participate via the technology supported by the institution, or by phone if necessary and assign IT staff or other point persons. Advance instructions about how to navigate the selected technology for the virtual site visits should be clear and easy to follow.

Institutions may want to conduct a test meeting to ensure that everyone familiarizes themselves with the meeting platform.

In the training for peer evaluators, we emphasize the importance of early preparation for an on-site visit. Now, in the virtual site visit, all team members need to be mindful of making efficient use of their virtual team meetings to succinctly state observations and raise questions, and to share near-complete draft report sections, prepared in advance, to facilitate development of the final draft report. In preparation for the visit, the team can start developing clear agendas and prepared questions for each requested interview in order to maximize available time in the virtual meeting space.

Slide 8 – During the Virtual Site Visit

During the Virtual Site Visit

Institutions

- Host a virtual site visit
- Start, monitor and end all virtual meetings
- Assign IT staff or other point persons
- Upload additional evidence requested

Team

- Clarify information and verify evidence
- Interview campus constituencies
- Document attendance at each meeting
- Access additional evidence
- Finalize the draft Team Report
- Conduct virtual team meetings and oral exit report

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Institutions

- Host a virtual site visit
- Start, monitor and end all virtual meetings
- Assign IT staff or other point persons
- Upload additional evidence requested

Team

- Clarify information and verify evidence
- Interview campus constituencies
- Document attendance at each meeting
- Access additional evidence
- Finalize the draft Team Report
- Conduct virtual team meetings and oral exit report

Narration: Activities during the virtual site visit by both institutions and teams are consistent with Commission policy and procedures, USDE Guidance, and recent Commission memos.

As hosts of the virtual site visit, the institution should start, monitor and end all virtual interview meetings. Assign an institutional lead person to each meeting who can (1) verify that the correct attendees have joined, (2) serve as a point person for any technological issues, and (3) respond to requests for additional evidence.

Additional evidence that the team needs to review during the virtual site visit must be uploaded into the secure MSCHE portal by the institution for all team member to immediately access. It should not be emailed to team members or to the Commission.

During the virtual site visit, peer evaluators will clarify the information provided in the report and verify evidence submitted by the institution. As a reminder, USDE guidelines require that virtual site visits rely on engaged, interactive formats, and may not be solely document reviews and exchanges of emails. There should be opportunities for discussions and conversations between team members and members of the institutional community.

Peer evaluators will document attendance in meetings.

The team will meet virtually with institutional representatives from the main campus for interviews and for the oral exit report. For Self-Study Evaluation visits, institutions with other locations must include constituents from those locations in the virtual site visit. Verifying information about branch campuses and one-third of active additional locations is still required for virtual site visits.

The team will conduct virtual team meetings. It is advisable that the Team Chair takes the lead during a virtual team meeting to ensure appropriate team engagement and progress.

As with on-site visits, the team will develop its draft Team Report that summarizes the team's findings during the timeframe of the visit.

An important update for peer evaluators as they go through the process of verifying information and evidence during the virtual site visit is that the USDE Office of Post-Secondary Education provided guidance for interruptions of study related to Coronavirus (COVID-19) on March 5, 2020. This guidance allowed temporary use of distance education for institutions not approved for distance education by their accreditors in order to accommodate students and allowed temporary consortium agreements for institutions, as well. Peer evaluators should be aware of these temporary measures that waived the requirement for substantive change approval for distance education because institutions may have recently made temporary accommodations for students that are not reflected in the accreditation materials prepared for the visit. The team does not need to address these temporary measures in the Team Report.

Slide 9 - After the Virtual Site Visit

Institutions & Team

- Adhere to all timelines related to the submission of draft reports, corrections, final reports, institutional responses, and the confidential brief.
- Team Chair creates a single bookmarked PDF of meeting attendance documentation in the confidential brief, for Evaluation Visits.
- Follow-up Visits should use the Follow-up Team Report Template.

Commission

- Analyzes all of the accreditation materials and any other appropriate information available to it, through its multi-level decision making process.
- Takes an accreditation action in accordance with its Accreditation Actions Policy and Procedures.

Narration: Activities after the virtual site visit by institutions, teams, and the Commission are consistent with Commission policy and procedures, USDE Guidance, and recent Commission memos.

The team and the institution should adhere to all timelines related to the submission of draft reports, corrections, final reports, institutional responses, and the confidential brief. If the dates for the virtual site visit were revised, all due dates for post-visit activities will be recalculated and communicated to the institution and the Team Chair.

Team Chairs should combine meeting attendance documents with the confidential brief into a single bookmarked PDF to upload to the secure MSCHE portal for evaluation visits. For follow-up visits, please follow the instructions in the Follow-Up Team Report template under Section II.

The Commission, through its multi-level decision making process, will analyze all accreditation materials and any other appropriate information available to it.

The Commission will take an accreditation action in accordance with its Accreditation Actions Policy and Procedures.

Slide 10 - Virtual Site Visit Etiquette

- Join meetings early with required downloads installed and tested
- Leverage technology to ensure quality interactions, including using microphone and chat features appropriately
- Whenever possible, turn on the camera so others can have a more meaningful interaction with you
- Monitor meeting time
- Avoid interruptions and multi-tasking
- Be flexible and understanding of technological glitches

Narration: During the virtual site visit, team members and institutional representatives should be mindful of certain courtesies that will make each virtual meeting or teleconference more meaningful:

Join the virtual meeting early and ensure that all required downloads have been installed and tested as facilitated by the institution's assigned IT professionals. If you have audio or connectivity issues, inform the institution's assigned IT staff.

Technology should be leveraged to ensure quality interactions, including using the microphone and chat features appropriately

Whenever possible, turn on the camera so others can have a more meaningful interaction with you.

Team members should monitor the virtual interview meeting time to be sure they can get answers to questions. It won't be possible to catch up on a few remaining items as you walk from meeting to meeting as with an on-site visit. Do not extend the meeting time, as others may need to connect to another meeting.

Try to avoid interruptions and multi-tasking while participating on the virtual site visit.

Be flexible and understanding of technological glitches.

Slide 11- Keys to Success for Virtual Site Visits

Ensuring Integrity

- Technological Support and Capacity
- Institutional Support
- Team Leadership
- Culture of Evidence

Narration: Ensuring technological support and capacity, institutional support, team leadership, and a culture of evidence are keys to success for ensuring the integrity of virtual site visits.

Regarding technological support and capacity:

When opting for a virtual site visit, institutions carefully considered the capacity of the virtual meeting platform that will be used for both their own constituents and for the team members. Keep that in mind as you accommodate larger groups.

Ideally, institutions should manage multiple modes of technology. Because it is likely that team members will split up into groups, it makes sense to set up different meetings for each group. Back-up plans should be developed in advance should one method of contact fail.

Team members will want to confer with one another throughout the virtual site visit, in addition to the scheduled team meetings, to discuss impressions and strategies for moving forward. One effective way of doing this is to set up parallel, all-day virtual meetings—one for team members and another for institutional administrators—so they can confer in these ongoing virtual meetings without requiring additional effort on the part of the institution's IT staff.

Regarding institutional support:

An on-site visit may or may not begin with a "get acquainted" opening session. For a virtual site visit, the institution and the team may want to come together within the meeting platform to facilitate

introductions and ensure that everyone familiarizes themselves with the technology. If the institution has prepared slides or other visuals, these should be sent in advance to reduce use of bandwidth.

Institutions should clearly communicate to team members what measures are being taken to ensure that the proceedings of the visit are confidential, including assurances that proceedings will not be recorded, either by the institution or employees.

As is the case with all visits, the institution should anticipate changes in the team schedule as team needs change during the virtual site visit. Institutions should think of various scenarios that could unfold during the virtual meetings and prepare to address them.

Regarding Team Leadership:

Team Chairs hold the responsibility to proactively communicate with the team and ensure all team members are engaged in the process. This includes the establishment and enforcement of specific goals for the schedule and team assignments, as well as taking the time to engage in team-building through "check in" times built into the team schedule where team members can share observations in the virtual work room.

Team members should ask questions and review evidence much like they do during any visit; still, they should be adaptable and expect a few technological glitches in the process.

Regarding a Culture of Evidence:

Be assured that, regardless of modality, answers to team members' questions constitutes evidence to use in the process of clarifying information or verifying compliance.

Institutional representatives should answer questions just as though they were participating in an on-site visit.

Handing out materials during meetings or delivering documents to the hotel work room are not possible with virtual site visits. As we have said, additional evidence requested by the team should be uploaded immediately to the secure MSCHE portal so that all team members can have access.

Slide 12 – Questions and Resources

Questions	
MSCHE Institution President or Accreditation Liaison Officer	Assigned MSCHE Vice President
Peer Evaluators	emattson@msche.org
Substantive Change	csmith@msche.org
State and System Representatives	dbonner@msche.org
Media/Communications	bkirschner@msche.org
Additional Questions	communications@msche.org
Resources	
MSCHE COVID website	www.msche.org/COVID-19
U.S. Department of Education (USDE)	www.ed.gov/coronavirus
Accreditation Review Cycle and Monitoring Policy and Procedures	https://go.msche.org/Accreditation-Review-Cycle-and-Monitoring
Follow-Up Visit Procedures	https://go.msche.org/Follow-Up

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Narration: The Commission has numerous resources available to you while you host and conduct virtual site visits. These include Commission staff, websites, and policies and procedures. Please continue to monitor the MSCHE COVID website for updated information.

Slide 13 - Thank you

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Narration: Thank you for your patience during these extraordinary and unprecedented times for our higher education community that has been so severely impacted by the coronavirus (COVID-19) pandemic. The Commission appreciates your dedication and commitment to peer review during this difficult time, especially as so many of you have been personally and professionally affected as well.

If, after participating in this training, the institution or team decide to opt out of the virtual site visit and request a delay for an on-site visit when conditions allow, please communicate this to the MSCHE Vice President liaison as soon as possible. The Commission wants you to choose the option that is best for the institution and the team and ensures the integrity of the process.

Please know that we are available to assist you through this process and be assured of our continuing interest in the safety, health, and well-being of our member institutions and all who contribute to peer review.