

Guidance for Host Schools with Virtual or Hybrid Visits: Protocols and Best Practices



Notice: Covid-19 Implications for 2021-22 Visits

In light of the continuing pandemic, AACSB's accreditation leadership has determined that the protocols that served our schools well last year will continue for the 2021-22 academic year. These protocols are required to be followed by schools. Best practices as listed in this document are not required to be followed, but are strongly recommended as they emanate from volunteer feedback received during the 2020-21 virtual visits.

Continuous Improvement Review Visits – Virtual unless conditions allow otherwise
Initial Accreditation Review Visits – Case-by-case basis, work with your staff liaison

There are times when AACSB may deem it necessary to conduct a continuous improvement review ("CIR") visit or an initial visit in a fully virtual or hybrid setting—in particular, if a location is experiencing challenges that could compromise the safety or health of a volunteer. In such cases AACSB will determine whether it is best to postpone the visit to another time when a team could be safely deployed, or whether it is best to conduct a virtual or hybrid visit.

A fully virtual visit means all members of the peer review team connect online with the school from their home, school, or another central location such as an AACSB office and the visit is conducted fully online. A hybrid visit means at least one member of the peer review team is on the ground and other team members join virtually. In both virtual and hybrid visits, a schedule is carefully worked out to be respectful of team members joining from vastly different time zones. If a fully virtual visit is determined to be the most appropriate course of action, both the dean/head of the host school and all members of the peer review team must agree to this modality.

A virtual visit relies on extensive and effective communications between the host school and the peer review team. With careful preparation, a virtual accreditation visit can be an effective substitute to an on-site visit and can result in a high-quality experience. To ensure a productive peer review team visit that fosters a high level of engagement among participants, this document includes the protocols that schools are required to follow, as well as best practices that AACSB has observed over time that can enhance the virtual visit experience and which AACSB recommends schools follow.

Process for 2021-22 Visits

Initial Peer Review Team Visits

Schools with an upcoming initial visit must seek approval from AACSB if a virtual or hybrid visit becomes necessary due to the pandemic. These requests will be approved on a case-by-case basis. Schools should contact their staff liaison 90 days prior to the visit to discuss the approval process. AACSB's Global Chief Accreditation Officer will review each request to decide if approval is appropriate.

Continuous Improvement Review Team Visits

CIR visits scheduled between July 1, 2021 and June 30, 2022 should be planned to take place virtually; however, a face-to-face or hybrid visit is acceptable if on-the-ground conditions allow and both the school and the peer review team are in agreement. AACSB encourages waiting until closer to the visit to make travel arrangements as conditions may change rapidly.

Virtual Visit Protocols - REQUIRED

- The same groups of people who would have been met with for an on-the-ground visit should be included in the virtual visit (students, faculty, external stakeholders, etc.). It's especially important to ensure students are available to participate in the visit. See below to find the agenda appropriate for your visit.

	Visits under 2013 standards	Visits under 2020 standards
CIR Visits	<u>Sample Virtual CIR 2013 business schedule.</u>	<u>Sample Virtual CIR 2020 business schedule.</u> <u>Sample Virtual 2020 business and accounting schedule</u>
Initial Visits	<u>Sample initial virtual schedule 2013 standards.</u>	<u>Sample initial virtual schedule 2020 standards</u>

- When preparing the agenda and meeting times, factor in the time zones of your team members and plan meetings for times that are conducive to their locations. On the proposed agenda, include the meeting times in the team members' time zones.
- Include cell phone numbers of the peer review team members, school leadership and the accreditation coordinator on the agenda.

- Build in 10-to-15-minute breaks between consecutive meetings.
- Build sufficient “white space” into the agenda in the mid-to later times of the day to accommodate any extra meetings the team may identify as necessary. In addition, extra time should be provided to the peer review team for report writing.
- Use a school-supported virtual meeting platform for the official visit meetings. The school should identify and convey a backup plan to the peer review team and all participants in the visit if the virtual meeting platform is unavailable at any time during the official visit.
- Ask the peer review team chair how they would like to handle private meetings between the team members. For instance, would they like the school to arrange private breakout space, or will the team use their own platform for team meetings and for working on the report.
- **Thoroughly test** the technology with each member of the team in advance of the first meeting and conduct training on the platform as needed. We cannot overemphasize the importance of everyone involved in the visit being fully familiar with the school’s virtual platform. Connections to any internal databases, intranet, etc., that may be shared with the team should be cleared and tested in advance.
- Have your I.T. support available before and during each virtual session to assist with troubleshooting as needed. If the school’s platform will be used by the team for their own team meetings, IT support should be available during that time as well.
- Where a group of participants are in the same room, ensure the room is equipped with appropriate audio equipment such as multiple microphones that can pick up all participants.
- For concurrent meetings, create separate breakout rooms to allow the teams to meet with groups separately at the same time. If your visit will have multiple virtual meeting rooms, provide links on the agenda for each meeting.
- Set the expectation that every participant will contribute to the discussion.
- Every participant in the visit (both on the school side and the peer review team side) is expected to be on camera for enhanced engagement necessary for a successful and meaningful peer review process.
- Create a virtual “base room” in a privacy compliant application with materials such as CVs, AoL data, and other supporting documentation and share the instructions for accessing with the team prior to the first meeting. The base room should be available in advance of the start of the visit, on a date that has been agreed upon by the school and peer review team chair. Prior to the visit, provide the members of the peer review team with a tour of the virtual base room so they are comfortable with accessing and navigating the site.

- Arrange for a virtual tour of the school's facilities. This can be pre-recorded and shared with the team prior to the visit. We have seen some creative and innovative tours of school facilities. What would the team see and do if they were there in person? Have fun with this part!

Note for Initial Accreditation Visits: The tour of the school's facilities must be live and may not be pre-recorded.

- To facilitate open and honest discussion and ensure privacy and confidentiality is maintained, meetings between groups are not allowed to be recorded in any fashion.

Virtual Visit Best Practices - OPTIONAL

- While the school's CIR report is due 60 days prior to the visit, early submission is encouraged, as it will provide the peer review team with more time to review the report and extra time has proven to enhance the virtual visit experience.
- Invite your peer review team chair to conduct a virtual pre-visit.
- Consider incorporating some social time into the agenda, such as sharing a meal together or a virtual happy hour.
- Consider modifying the schedule to minimize long days in front of the computer. For example, consider spreading the visit over a longer period of time. This is especially helpful when peer review team members are from vastly different time zones. The school and team can mutually agree to conduct the visit over several days for the convenience and comfort of all.
- To maintain integrity of the visit, all participants should direct their full focus on the visit when meetings are in session during the visit and maintain professional behavior. Silence cell phones and eliminate other distractions. Set the expectation with your colleagues at the school that you are not available during the visit meetings.
- Assign a lead person for each meeting. This can be helpful in assisting with introductions, directing questions, and keeping time, particularly with large groups.
- To support faculty or staff who may not be as familiar with the virtual meeting platform, have office hours for them to direct questions to the appropriate expert.
- To ensure a smooth virtual meeting experience, encourage participants to use a wired connection if available and keep the number of other programs running in the background to a minimum.