



## Guidance for NASPAA Virtual Site Visits

### Introduction

The site visit is an opportunity for the program to showcase its strengths, for the site visit team to confirm and clarify the self-study report, and for COPRA to gain insight into the program and its mission. The purpose of this guidance is to provide suggestions to both host programs and site visit teams to ensure an effective, productive, and safe virtual site visit. Having a common understanding of expectations is critical to the success of the site visit, both in-person and online. **Please refer to the [Site Visit Manual](#)** for additional information on the purpose and focus of site visit.

### Planning for the Virtual Site Visit: Establishing Rapport

- 1. Site Visit Chair and Program Head meet to plan.** The site visit team chair and program representative might benefit from at least one informal “get to know you” session to specifically focus on how to make the virtual site visit productive. Review the draft site visit schedule together. Is it realistic given the virtual format? Are there adequate breaks? Ensure a common understanding of the schedule and who will be involved in each meeting.
- 2. Have an informal kick-off virtual meeting the day/evening before the formal meetings start.** Schedule a one hour informal get-together with the site visit team, program director, and key faculty and staff the night before the site visit starts. Use this time to focus on setting a positive rapport for the site visit and enhance familiarity between the program and the site visit team. The meeting can be used to help orient the site visit team to those involved in the program, and to establish trust and understanding.
- 3. Online meetings: Who should be included?** All meetings that would occur during an in-person visit (see Appendix B, Site Visit Checklist, on page 33 of the [Site Visit Manual](#)) should occur during the virtual site visit. Take advantage of the experience that many individuals now have with virtual meetings. It may be tempting to get more people involved without the logistics of in-person meetings but maintain a balance (see #4).
- 4. Maintain a balance.** Be conscious of the challenge of multiple days of virtual meetings that the site visit team will face. Establish a reasonable schedule of no more than 4 consecutive days of virtual meetings. See the Appendix for two and three day sample schedules.
- 5. Be mindful of time zones.** Be sure to consider the location from which each member of your site visit team is joining. Consider starting and ending times for meetings that are sensitive to the location of all participants. Ensure that all communication references the time and the time zone.
- 6. Be creative.** If there are better ways to accomplish the goals of specific meetings, do it but be sure to communicate with everyone to maintain shared expectations.

### Hosting an Online Site Visit and Sharing Documents: Host Programs

- 1. Make sure to review the agenda with the site visit team.** Sharing the agenda with the site visit team in advance is critical. Meetings should start and end on time. The agenda should provide opportunities for the site visit team to meet privately to debrief and provide breaks between virtual meetings. A sample agenda is provided in the Appendix.

2. **Identify your host institution's video-conferencing platform.** Test your conferencing service before the visit begins. *We cannot emphasize enough how important connectivity is to a successful virtual site visit.*
3. **Have backup plans.** Who should the site visit team contact if there is a technical difficulty or if a critical participant does not show up for a virtual meeting? If a site visit team member or a participant is having trouble with a video connection, is a phone number available for each meeting so that the site visit schedule does not fall behind? Include instructions for meeting participants and the site visit team regarding what to do in case such issues arise and make sure the site visit team chair is briefed on the back-up plan.
4. **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 platforms that will be used during the virtual site visit.
5. **Be consistent.** Stick with a single online meeting platform (e.g., Zoom) to ensure consistency and limit transitions.
6. **Follow university, country-wide, state, and local policies, and [Centers for Disease Control Guidance](#) (CDC).** University, country, state, or local policies must be observed. Resources are available from the CDC for [universities](#).
7. **Engage All Stakeholders Early.** Teams are expected to engage all program stakeholders, including those not on campus, virtually. Please take steps to ensure open communication with all those engaged including clear schedule expectations, access to video conference links, conference call numbers, etc.
8. **Ensure all participants have all information needed to be prepared for the online meeting.** We suggest providing both email and calendar invites with the video conference link and any additional information required to access the meeting (phone numbers, meeting passwords). Provide information on who to contact for issues accessing the virtual meetings.
9. **Be present.** Treat those on the screen the same as you would in person - keep your eye on the camera, speak clearly, do not interrupt. All participants should have their cameras on, mute microphones except when speaking, turn off email and other notifications, and access the virtual meeting from a quiet, private space (to the extent possible).
10. **Share documents in advance.** An important part of the site visit is sharing documents for the site visit team to review. This is easily done online using cloud-based systems. Find out your university's course management system (i.e., Blackboard), or other file sharing site (Dropbox, Box, etc.) to ensure the team can review all pertinent documents before the site visit. Be sure your file sharing is secure, and files are removed and/or access discontinued once the visit is complete. Documents provided in response to the Interim Report should be uploaded to the [NASPAA Data Center](#) (NDC). Documents must be made available to the site visit team 30 days prior to the visit.

## Facilitating a Virtual Site Visit and What Happen Afterwards: Site Visit Team

1. **Advanced planning.** 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, particularly 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 with university administrators to gather evidence and clarify questions as identified by COPRA in the Interim Report. It is critical that the team exchanges information well in advance of the visit. *If the team needs an online platform for planning, please let NASPAA know.*
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.
3. **Make sure all attendees can participate.** It can be more difficult to direct a conversation in a virtual meeting, especially with participants talking over each other. Consider a suggested procedure to ensure that everyone invited to a meeting has a chance to participate.
4. **Build trust.** Be mindful that unlike an in person site visit, the program and team have fewer opportunities to make direct connections through informal conversations, introductory meals, body language, etc. If the schedule allows, consider asking participants in meetings to briefly share something they particularly like about the program to help break the ice.
5. **Be present.** Please be sure the entire team is focused on the visit. Site visit team members should not multitask during virtual site visits. Set time aside in your schedules as you would if you were traveling to the institution. Treat those on the screen the same as you would in person - keep your eye on the camera, speak clearly, do not interrupt. Repeat back what you heard if there is any confusion regarding meaning, or if technology causes a glitch in the audio quality.
6. **Be direct.** Feedback from teams that have participated in virtual site visits indicate it can be harder to direct the meeting because of delays in communication, conversations running long, or difficulties “reading a room” in the virtual world. To avoid dead air, it may help to pose a question to a specific person and get the conversation rolling.
7. **Share an agenda.** Have an agenda (or an outline of talking points) for each meeting. Ask the program director to share this information with meeting participants, in advance if possible. This helps keep the meeting focused.
8. **Be flexible.** Not everyone will feel as comfortable in virtual settings. Think about ways to frame questions and connect to engage all communication types, just as you do in your own classrooms or business.

## Promoting Trust, Fairness, and Finding Ways to Connect Virtually

1. **Purpose of the site visit.** Site visitors have two roles:
  - a. The team is the inquiring arm of COPRA;
  - b. The team will, through site visit report, present and interpret the applicant program to COPRA.

It is very important that all participants embrace this understanding and approach the site visit with trust and goodwill. Reasonable people can translate these attitudes into appropriate site visit performance. Appendix A in the [Site Visit Manual](#) (pages 31-32) includes Summary of Peer Review Process that highlights these points and may be useful in ensuring a shared understanding.

2. **Keep it cooperative and collegial.** Every effort should be made to ensure that the site visit is a cooperative, collegial experience and not an adversarial encounter, and that no one involved perceives it as such. Program representatives and site visitors should take every possible occasion to reinforce this understanding. COPRA is dedicated to the proposition that openness, candor, and trust at the host institution must, in turn, generate goodwill, sensitivity and dispassionate evaluation on the part of the site visitors.
3. **Planning and communication are key.** Proactive communication, advance planning, sharing information in a timely fashion, having an agenda, and sticking to the schedule are effective ways to build trust and fairness into the process.
4. **Find ways to connect meaningfully in virtual space by creating “[virtual human moments.](#)”** Meetings that are “intentionally designed, managed, and run to produce virtual human moments” (see link) can help make virtual meetings more like in-person meetings. All parties should encourage a safe environment for participants to share both their official role and, at least briefly, their personal experience. Good preparation on the part of the host program, and sensitive and insightful questioning by the site visit team can further this goal.

### **Reach out to NASPAA!**

1. **Contact us.** Staff are here to help make planning and conducting virtual site visits 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 and concerns.
2. **Share what you learned.** Both programs and site visitors have the chance to provide feedback to NASPAA and COPRA via surveys conducted in the spring once site visits are done. Please take the time to share what you learned about practices for virtual site visits.

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**Appendix**  
**Sample Two-Day Virtual Site Visit Schedule**

<b>Date</b>	<b>Time Eastern US Time</b>	<b>Event</b>	<b>Program Attendees</b>	<b>Virtual Link &amp; Password</b>
Pre-Meet		Program Head Meets SVT Chair		
Pre-Meet	17:00 to 18:00	Informal “get to know you” with site visit team, program director, key faculty, staff		
<b>DAY 1</b>				
26-Feb	08:30 to 09:30	SVT meets with Program Head		
26-Feb	09:45 to 10:45	SVT meets with the Dean and Associate Dean		
26-Feb	11:00 to 12:00	SVT meets with full-time faculty individually and groups		
26-Feb	12:15 to 13:15	Meal break. SVT can meet to debrief via virtual meeting	site visit team	
26-Feb	13:30 to 14:30	SVT meets current students (Gr. 1)		
26-Feb	14:45 to 16:00	SVT meets current students (Gr. 2)		
26-Feb	16:15 to 17:30	SVT reviews day's progress, documentation, and prepares further lines of inquiry	site visit team	
<b>DAY 2</b>				
26-Feb	08:00 to 08:30	SVT meets with Provost		
26-Feb	08:45 to 09:45	SVT meets with alumni		
27-Feb	10:00 to 11:00	SVT meets with employers		
27-Feb	11:15 to 12:00	SVT reviews remaining items with full-time faculty		
27-Feb	12:15 to 13:30	Meal break. SVT meets to review remaining items.	site visit team	
27-Feb	13:45 to 14:45	SVT meets with Program Head		
27-Feb	15:00 to 16:30	SVT meets alone to arrive at a consensus about the site visit and to outline the draft Site Visit Report	site visit team	

Note: The 15 minutes between each meeting is designed for personal breaks and transitioning between meetings.

### Sample Three-Day Virtual Site Visit Schedule

Date	Time Eastern US Time	Event	Program Attendees	Virtual Link & Password
Pre-Meet		Program Head Meets SVT Chair		
25-Feb	17:00 to 18:00	Informal “get to know you” with site visit team, program director, key faculty, staff		
<b>DAY 1</b>				
26-Feb	09:00 to 10:00	SVT meets with Program Head		
26-Feb	10:15 to 11:15	SVT meets with the Dean and Associate Dean		
26-Feb	11:30 to 12:30	SVT meets with full-time faculty group		
	12:45 to 14:00	Meal break. SVT can meet to debrief via virtual meeting	site visit team	
26-Feb	14:15 to 15:30	SVT meets current students (Group 1)		
26-Feb	15:45 to 16:30	SVT reviews day's progress, documentation, and prepares further lines of inquiry	site visit team	
<b>DAY 2</b>				
27-Feb	09:00 to 10:00	SVT meets with Provost		
27-Feb	10:15 to 11:30	SVT meets current students (Group 2)		
27-Feb	11:45 to 12:30	SVT meets with alumni (Group 1)		
27-Feb	12:45 to 14:00	Meal break. SVT can meet to debrief via virtual meeting	site visit team	
27-Feb	14:15 to 15:15	SVT meets with program staff		
27-Feb	15:30 to 16:30	SVT reviews day's progress, documentation, and prepares further lines of inquiry	site visit team	

Note: The 15 minutes between each meeting is designed for personal breaks and transitioning between meetings.

### Sample Three-Day Virtual Site Visit Schedule

Date	Time Eastern US Time	Event	Program Attendees	Virtual Link & Password
<b>DAY 3</b>				
28-Feb	09:00 to 10:00	SVT meets with alumni (Group 2)		
28-Feb	10:15 to 11:15	SVT meets local employers		
28-Feb	11:30 to 12:30	SVT reviews remaining items with full-time faculty		
28-Febt	12:45 to 14:00	Meal break. SVT can meet to debrief via virtual meeting, finalize remaining question for Program Head	site visit team	
28-Febt	14:00 to 15:00	SVT meets with Program Head		
28-Feb	15:15 to 16:30	SVT meets alone to arrive at a consensus about the site visit and to plan for writing the draft Site Visit Report	site visit team	

Note: The 15 minutes between each meeting is designed for personal breaks and transitioning between meetings.