

## **Virtual Site Visits: Tips for Evaluators**

### **Training and Technology**

- ☐ Complete Commission training for participation in a [virtual site visit](#).
- ☐ Participate in technology training offered by the institution prior to the visit.
- ☐ Notify the institution of any needed accommodations.
- ☐ Consider a back-up plan in case technology becomes a challenge in your home or office.

### **Preparation**

- ☐ Prepare preliminary drafts of your sections of the team report and share with other team members.
- ☐ Consider in advance if the team will use a collaborative writing approach using Google Docs or DropBox, for example, to do group review of the team report, track changes, and add comments. Start practicing before the visit with the software and check that no passwords are needed to share a document on your computer with another team member. Another option to consider is the share screen function available in some platforms to do group editing during a virtual meeting.
- ☐ Having a near-complete draft of the team report at the start of the visit will make it clear where your attention should be focused to clarify and verify and will allow for easy updating and editing as needed.

### **Schedule**

- ☐ Team chairs ensure ample opportunities to confer privately with the team during the day, as needed, and at the end of each day when the team report is reviewed and updated.
- ☐ Team chairs keep a relatively open schedule when possible, depending on the size of the team, to be available to join meetings as needed and to confer with institutional representatives about requests for additional documentation and schedule changes.
- ☐ Attend “get-acquainted” event, if scheduled, to get to know key institutional leaders.
- ☐ Wherever you are located during the visit, keep distractions to a minimum and avoid performing job-related duties during the virtual site visit.
- ☐ Take appropriate team member breaks as noted in the virtual site visit agenda.
- ☐ Tips from peer evaluators – take breaks and protect your time! Don’t overschedule yourself! Request your interviews/meetings to clarify information and verify compliance, not just to meet

and greet. The institution will understand. Be flexible and don't forget to hang out in the virtual team room.

- ☐ Ensure that you are available for virtual team meetings in the evenings.
- ☐ Participate virtually in the oral exit report to support the team chair and honor the work of the institution.

### **Interviews/Meetings**

- ☐ Uphold the Commission's expectation of confidentiality and ensure all discussions between team members and institutional representative and among team members are not recorded in any way.
- ☐ Rely on institutional meeting "hosts" to get meetings started and moderate the chat function during open sessions.
- ☐ Be prepared with the specific questions you need to ask in the meeting, so the available time is used most efficiently. If you are paired with another team member for a meeting, determine in advance who will take the lead, so the meeting moves at the desired pace.
- ☐ Ensure all institutional representatives have opportunities to speak during the virtual meetings, if possible.
- ☐ If you have requested additional evidence, consider meeting briefly with the appropriate institutional representative to follow-up on any questions you have after you have reviewed the evidence.
- ☐ Be sensitive to people's need to discuss the institution's current situation in light of the pandemic. Remember you are there as a peer evaluator to take a holistic view of the institution's compliance with Commission expectations.