

Virtual Site Visits: Tips for Preparing the Visit Agenda

Planning the Team Schedule

- ☐ Remember the team schedule is ultimately determined in collaboration with the Team Chair.
- ☐ Try creative ways to organize the “get acquainted” virtual program for the evaluators to get a feel for your institution. Admissions virtual tours are a good start. You could also use short student performances or a short slide show (10-15 slides) highlighting student or faculty artistic and academic achievements.
- ☐ Create a Master Schedule with embedded links that shows all meetings for the visit and which team members are attending. Send out individual calendar invitations with meeting links embedded. That way, the meeting link will be readily accessible to meeting participants within their calendar.
- ☐ Schedule daily meetings (15 minutes) for the team chair and the institution’s president, usually at the beginning and end of each day.
- ☐ Offer to schedule an initial meeting and a first working session for the team. Ensure confidentiality by ensuring that no one else has access to that meeting. Some teams may have met prior to the visit, or may prefer to schedule their own initial meetings.
- ☐ Schedule no more than three consecutive sessions for any team member.
- ☐ Include 10-15-minute breaks between sessions. Include longer breaks for team members to have lunch and dinner.
- ☐ Schedule sufficient time for substantive conversations during meetings and additional document review during the course of the day, if needed.
- ☐ Include daily team meetings in the agenda. Allow the team to determine the length of the evening meetings.
- ☐ As requested by the Team Chair, schedule open sessions to allow an opportunity for members of the campus community to meet with the team, keeping in mind the technological capacity of your platform. Ensure confidentiality by requiring a campus username and password for access.
- ☐ Schedule the exit meeting for the final day of the virtual visit in a platform that allows for broad campus participation. This meeting can take place in the morning or afternoon, as determined by the Team Chair.

Technology

- ☐ Schedule a technology check-in meeting with the team to ensure that everyone knows how to use the meeting platform well ahead of the virtual site visit.
- ☐ Assign an IT staff member to be available for chunks of time during the day. Ensure that the team members know how to contact this staff member.

Interviews

- ☐ Activities for the two full days of the virtual visit include interviews with groups and individuals. Any State or System representatives accompanying the team are invited to interviews.
- ☐ Consider assigning a “host” for each meeting/session, who will be first to log in to the meeting and ensure that the appropriate people are in attendance. The host may also monitor the chat function for questions and gather additional evidence requested by team members.
- ☐ Begin each session at least a few minutes before the scheduled time in case participants have difficulties logging in. Establish a protocol for introductions, especially when the group is too large to allow introducing everyone at the beginning of the session.
- ☐ Build in open times to allow for schedule adjustments requested by the team. Have a “host” on standby for such meetings.

Branch Campus and/or Additional Locations

- ☐ Make arrangements for virtual visits to off-site locations, including branch campuses and 1/3 of additional locations. These visits can take place before the virtual site visit begins and have to be completed prior to the end of the second full day of the visit.

Sample Agenda for Evaluation Visit

	All day virtual	Day 1						
	Team Room	Standard 1	Standard 3	Standard 4	Standard 5	Standard 6	Standards 2 & 7	
	Available for Team Members	Team Member or Chair	Faculty, Dean or Other Admin	Student Affairs Expert	Assessment Expert	Finance Expert	Team Member Compliance	
8:30 – 9:20	All day virtual Team Room Available for Team Members Only	President's Council						
		Chair pre-assigns timing and sequencing of team members' questions and allows sufficient time for campus stakeholder response; leaves time for additional questions to be asked by team members						
9:30 – 10:30		CEO (15 minutes)	Faculty, Exec Comm	Student Development Directors	Faculty, Exec Comm	Chief Financial Officer	Chief Financial Officer	
		Multiple technology nodes made available; technology tested 30 minutes prior to meeting; IT staff made available to address concerns.						
10:30 – 11:20		Team Discussion						
11:30 – 12:30		Team chair leads discussion regarding general impressions, team needs, etc.						
		Board of Trustees						
12:30 – 1:30		Team Member Lunch Break						
1:30 – 2:30			Strategic Plan Assessment Committee		Academic Support Directors	University Assessment Committee	Strategic Plan Assessment Committee	Academic Support Directors
				CIO & Dist Ed Coordinator			CIO & Dist Ed Coordinator	Data Verification and Compliance Review: Interviews
2:45 – 3:15			Meeting with Representative Students	Meeting with Representative Students	Meeting with Representative Students	Meeting with Representative Students		Meeting with Representative Students
3:30 – 4:30			CEO (15 minutes)	Faculty, Program Review	Enrollment Services Directors	Departmental Assessment Coordinators	Enrollment Services Directors	
4:40 – 5:30								
5:30 – 7:00		Team Discussion						
	All day virtual Team Room Available for Team Members Only	Day 2						
9:00 – 10:00		CEO (15 mins)	Teaching & Learning Center	Student Government	Teaching & Learning Center	Development	Student Government	
10:10 – 11:00		Representative Faculty	Representative Faculty		Representative Faculty		Representative Faculty	
11:00 – 12:00		Team Discussion						
12:00 – 1:00		Team Member Lunch Break						
			Tenure and Promotion Committee	Facilities	Department Chairs	Facilities	Department Chairs	
1:00 – 1:50								
2:00 – 2:50		HR Director	Gen Ed Council		Gen Ed Council	HR Director	Gen Ed Council	
			Council of Deans	Athletics	Council of Deans		Athletics	
3:00 – 3:50								
4:00 – 4:50		CEO (15-30 minutes)	Hold for last minute needs	Hold for last minute needs	Hold for last minute needs	Hold for last minute needs	Hold for last minute needs	
5:00 – 8:00	Team Discussion							
	Team Members Complete Report							
	Day 3							
8:30 – 9:00	Chair Meets with CEO							
9:00 – 10:00	Oral Exit Report							

SAMPLE TEAM CHAIR'S MEETING SCHEDULE Conducted through Zoom

DAY 1 (DAY 2 NOT SHOWN)	
8:00-8:25 AM: President	https://collegedomain.zoom.us/j/123456789
Name	President, Host
8:30-8:55 AM: Board of Trustees	https://collegedomain.zoom.us/j/2123456789
Name	Trustee
Name	Trustee
Name	Secretary to the Board of Trustees, Host
9:00-9:45 AM: Open Available for editing report, additional document review, or other meetings	
10:00-11:00 AM: Cabinet	https://collegedomain.zoom.us/j/4123456789
Name	Provost & Senior Vice President of Academic Affairs, Host
Name	Vice President of IT and CIO
Name	CFO
Name	Vice President of Enrollment Management
Name	Dean of Students
Name	Faculty, Faculty Senate President
11:15-12:00 PM: Resource Allocation	https://collegedomain.zoom.us/j/5123456789
Name	CFO
Name	Associate Provost for Finance and Planning
Name	University Controller, Host
Name	Faculty, Faculty Senate Chair of Budget Committee
12:00-12:30 PM: Visiting Team Consultation Time - Team only meeting link not shared publicly	
12:30-1:10 PM: Lunch	
1:15-2:00 PM Open Faculty Forum	https://collegedomain.zoom.us/j/7123456
Name	Faculty name and title, Host
2:15-3:00 PM: Planning	https://collegedomain.zoom.us/87123456
Name	Vice Provost for Academic Planning, Host
Name	Director of Strategic Initiatives
Name	CFO
Evening: Visiting Team Consultation Time - Team only meeting link not shared publicly	
FINAL DAY	
Early Morning: Additional meetings as needed - Host on standby to setup and join additional meetings	
Late Morning: Visiting Team Finalizing Team Report - Team only meeting link not shared publicly	
12:15 PM: President	https://collegedomain.zoom.us/9123456
Name	President
1:00 PM: Oral Exit Report	https://collegedomain.zoom.us/1987654
Oral Exit Report	Campus Community, Name of Host
2:00 PM: End of Visit	

Team Visit Contacts:

College Middle States Team Contact:	Primary Name, cell number, email address
	Backup Name, cell number, email address
President's Office Contact	Primary Name, cell number, email address
Provost's Office Contact	Primary Name, cell number, email address
	Backup Name, cell number, email address
IT Contact	Primary Name, cell number, email address
MSCHE Liaison	Name, cell number, email address
MSCHE Visit Team Chair	Name, cell number, email address