

There are times when an initial mentor visit needs to be conducted in a virtual manner—in particular, if a location is experiencing challenges that could compromise the safety or health of a volunteer. In such cases, schools and mentors will work together with counsel from their AACSB staff liaison to determine whether it is best for the school and volunteers to postpone the visit to another time when a team could be deployed, or proceed with conducting the visit virtually.

Ideally, an initial mentor visit occurs within the first year of assignment. The virtual visit option could involve members from the school and the mentor connecting from their home or school, or from a central location, such as one of AACSB's three global offices. If a virtual visit is determined to be the most appropriate course of action, both the dean/head of the host school and the mentor must agree to this format.

The initial accreditation process relies on extensive and effective communications between the host school and the mentor. With careful preparation, a virtual mentor visit can be an effective substitute to an on-site visit and can result in a high-quality experience. To ensure a productive mentor visit that fosters a high level of engagement among participants, this document outlines the protocols that should be followed, as well as best practices that AACSB has observed over time that can enhance the virtual visit experience.

### Virtual Visit Protocols

- The on-site visit should consist of meetings similar to those suggested in AACSB's sample [mentor visit agenda](#). Likewise, the same individuals from the sample agenda should be included in the virtual visit agenda. For example, the virtual visit must include the head of the school, faculty chairs or heads of programs, and the chief academic officer. As always, work closely with your mentor on the development of the visit schedule.
- When preparing the agenda and meeting times, factor in the time zones of your mentor and plan meetings for times that are conducive to their location.
- Use a school-supported virtual meeting platform.
- Test the technology with the mentor in advance of the first meeting.
- Establish meeting guidelines and share with all meeting participants. Examples may include muting yourself when not talking, raising a virtual "hand" when someone wants to talk, turning on video during meetings, discouraging multitasking during meetings, etc.
- If participants will be in the same room, ensure the room is equipped with appropriate audio equipment such as multiple microphones that can pick up all participants.
- If your visit will have multiple virtual meeting rooms, provide clear instructions on the agenda regarding which room each meeting will occur in.

- Ensure that every participant has an opportunity to contribute to the discussion.
- Discuss with your mentor in advance of the visit which materials should be available in a digital format, such as available assessment data, syllabi, faculty handbooks, policies, etc., and other supporting documentation. Share the instructions for accessing with the mentor in advance of the virtual visit.
- Connections to any internal databases, intranet, etc., that may be shared with the team should be cleared and tested in advance.
- Arrange for a virtual tour of the school's facilities. This can be pre-recorded and shared with the team prior to the visit.
- School leadership, school accreditation coordinators, and the mentor should share the phone numbers where they can be reached during the visit.

## Virtual Visit Best Practices

- Have participants introduce themselves at the beginning of each meeting.
- Build in 10-to-15-minute breaks between consecutive meetings.
- 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.
- Consider having a hand-held camera that will more closely capture facial expressions, body language, etc, to enhance the experience.
- Consider a collaborative document application (e.g., SharePoint, Google Docs, etc) that allows meeting participants to view document edits in real time for reviews of iSER and progress report drafts.
- Assign a lead person for each meeting. This can be helpful in assisting with introductions and directing questions, particularly with large groups.
- To support faculty or staff who may not be as familiar with the virtual meeting platform, designate office hours for them to direct questions to the appropriate expert.
- To ensure a smooth virtual meeting experience, consider using a wired connection and keep the number of other programs running to a minimum.
- Test the technology with external stakeholders participating in meetings (e.g., advisory board members, alumni, etc.) and conduct training on the platform as needed.
- If the mentor is addressing a large group of faculty and/or students, a good meeting guideline is to keep participants on mute and submit questions through the virtual meeting platform's chat feature.