

Virtual Continuous Improvement Review Visit Protocols and Best Practices



There are times when AACSB may deem it necessary to conduct a continuous improvement review visit 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 AACSB will determine whether it is best for the school and volunteers to postpone the visit to another time when a team could be deployed, or whether it is best to proceed with conducting the continuous improvement review visit virtually. This second option could involve members of the peer review team connecting from their home or school, or from a central location, such as one of AACSB's three offices. If a 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 format.

The continuous improvement review 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 must 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 must consist of the same meetings suggested in AACSB's sample virtual [CIR agenda](#). Likewise, the same individuals from the sample agenda should be included in the virtual visit agenda. For example, the virtual visit must include students, faculty, and other key stakeholder groups. As always, work closely with your peer review team chair on the development of the visit schedule.
- 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.
- Use a school-supported virtual meeting platform. Backup technologies for the visit should be determined and agreed upon between the school and team members (e.g. alternative virtual meeting platform, phone, WhatsApp, etc.)
- Consult with your peer review team chair to see if they would like to use your virtual meeting platform or their own platform for team meetings in between sessions and while they are working on their report.

- Test the technology with each member of the team in advance of the first meeting and conduct training on the platform as needed.
- Have your I.T. support available before and during each virtual session to assist with troubleshooting as needed.
- 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.
- For concurrent meetings, reserve separate meeting rooms to allow the teams to meet with groups separately at the same time. 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.
- Create a virtual “base room” in a privacy compliant application with materials such as CVs, AoL data, student records, 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.
- 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 peer review team members should share the phone numbers they can be reached on during the visit.
- In order to facilitate open and honest discussion and ensure privacy and confidentiality is maintained, meetings between groups should not be recorded.

Virtual Visit Best Practices

- Submit your CIR report earlier than 60 days prior to the visit. Providing the peer review team with more time to review the report has proven to enhance the virtual visit experience as it improves the team’s readiness and planning for the virtual visit.
- Invite your peer review team chair to conduct a virtual pre-visit.
- 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.
- 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.
- Consider incorporating some social time into the agenda, such as a meal together.
- 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.
- Limit meeting attendance to key individuals to keep meeting size manageable.
- 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, have office hours for them to direct questions to the appropriate expert.
- To ensure a smooth virtual meeting experience, considering 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.