Virtual site visits: a new approach to nursing accreditation

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ABSTRACT

The COVID-19 pandemic has disrupted higher education delivery. In March 2020, relaxed federal guidelines allowed for programmatic accreditation to continue in a virtual format. Nursing programs seeking accreditation need to modify visit plans and comply with the accrediting organization guidelines and procedures. This article describes the adaptations nursing programs may need to make when seeking accreditation review and hosting a virtual site visit. It will discuss how to prepare, plan, and implement the virtual site visit.

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The COVID-19 pandemic has disrupted higher education delivery, thus impacting teaching approaches, student learning, and other campus activities. Reduced campus operations along with travel and visitor restrictions at colleges and universities posed challenges for program accreditors to perform on-site visits. In March 2020, the US Department of Education,[7] relaxed guidelines for program accreditors and currently allow temporary flexibility and the use of virtual site visits to ensure assessment of nursing programs to continue during the pandemic.

Accreditation provides programs and faculty opportunities to use a continuous improvement process to assess quality and ensure the attainment of established standards. The nursing program prepares an in-depth self-evaluation report that measures performance against established standards. Then, an on-site evaluation, where a team of peers reviews the program(s) and determines the achievement of established standards. While ensuring public accountability, this process also helps to identify a nursing program's strengths and weaknesses.[4] The accreditation process acknowledges program quality, enables eligibility for federal and/or state funding, and assures graduates' marketability and their ease of institutional transfer of credits.[6] Since accreditation is an essential aspect of nursing education, accreditation reviews cannot stop due to COVID-19.

The USDE[7] and the Council for Higher Education Accreditation[3] provided updated guidance to accreditors allowing for the continuation of accreditation visits through the use of virtual modalities. Each accrediting organization was permitted to proceed with site visits - whether to postpone or develop policies and procedures for virtual site visits. As mandated by the USDE,[7] if using virtual site visits, a brief follow-up verification visit, not a full review, may be necessary to meet statutory and regulatory requirements. This verification visit will confirm facilities and may include student interviews and review of documents if necessary.[1] This follow-up visit needs to be conducted within a reasonable time after the virtual visit. Scheduling of these visits has yet to be determined and will be dependent upon the COVID-19 progression and recommendations from national and international health agencies.[2]

Nursing programs seeking accreditation, particularly during the COVID-19 pandemic, need to work with the accrediting organization to determine its approach and guidelines for a virtual site visit.[3] This article aims to describe the adaptations nursing programs may need to make when seeking accreditation during the COVID-19 pandemic by providing information on how to prepare, plan, and implement the virtual site visit.

Preparing for the virtual site visit

Traditionally, a nursing program preparing for an on-site accreditation visit would prepare a self-study report formatted according to the accreditor's guidelines and send their report to the accrediting agency. This narrative report is usually shared with the program reviewers approximately six weeks before the scheduled site visit. Depending upon the accrediting agency, it may be sent in a printed and/or electronic format. Faculty would also prepare evidence and assemble supporting documents such as printed samples of course materials, evaluation tools, recruitment and marketing materials, student handbooks, faculty policies, meeting minutes, and catalogs. These materials would be accessible for the accrediting team to review during the on-site visit.

A virtual visit requires some modification to these preparations since the accreditation review team will not be on campus to

review documents or speak with campus individuals in person. Similar to a traditional visit, the self-study report is submitted before the virtual visit. However, supporting materials must now be shared with the visitors in an electronic format prior to the visit. The electronic submission might require uploading the documents, saving and sharing them via an electronic method such as a USB drive or another type of electronic program. One approach involves the use of a Learning Management System (LMS) for sharing electronic evidence. The nursing program can store items in the LMS during their report writing and allow site visitors access to these materials.[5] The LMS may be advantageous as it is password secured, allows date restrictions for access, reducing concerns about the loss, damage, or inappropriate access to USB materials. Additionally, all faculty can have access to all electronic materials, which can help the self-study report writing or visit preparation. A potential problem using an LMS system is that reviewers may not be familiar with the selected LMS system and will not be prepared to use this modality. Another option for saving and sharing documents with reviewers could be through a password protected data cloud, such as GoogleDocs. Saving files and documents to the cloud with password protection allows those with granted permission to access materials from any location at any time. This method may reduce the risk of damage to a USB drive as described above, allows for faculty editing if necessary, and promotes security. Nursing programs will want to check with the accrediting agency to determine which method is acceptable for sharing electronic documents.

The LMS may also be used in various ways during the virtual visit. If the LMS is described in the self-study report, the reviewers may request to be enrolled as students in individual course shells to review course information. Colleges or universities may also use LMSs for student or faculty benefits. For example, if the LMS contains a general nursing program bulletin board (BB) for students, meaning all students in the nursing program are enrolled in this bulletin board course shell, the reviewers may want to see how this method of information distribution supports students. The nursing BB may also have resources such as student handbooks, policies, and other tools to support students during the program that reviewers may want to see.

Regardless of the format used for sharing, it will be important to ensure that all visit team members receive these electronic files in sufficient time for the visit and are knowledgeable about retrieving information. Since visitors may use various operating systems, saving materials in formats that allow easy access such as PDF files is vital. Additionally, when preparing these electronic documents, faculty should consider how to logically organize and label these materials for easy access and retrieval. If a specific list of documents is requested by the accrediting agency, then label these files so they correspond to that requested document list. If the accrediting agency does not specify required files, then prepare materials that align with the exhibits discussed in the self-study report. Providing an index of these documents and exhibits will make it easier for the reviewers to locate items.

Hosting the virtual visit

Accreditation site visits have traditionally involved opportunities for the review team to verify, clarify, and amplify information presented in the self-study report. The site visitors will speak with nursing and program administrators, faculty, students, alumni, human resources personnel, and clinical partners. They will also meet with a variety individuals and other people providing students services such as financial aid, the registrar, admissions, and career services. Lastly, the reviewers will also visit with the general public. These public meetings may include individuals who have no direct responsibility for the nursing program such as patients/clients, non-nursing faculty, healthcare providers, and citizens. Additionally, team members will make observational visits to clinical agencies and classes, review evidence and documents provided, and make other campus observations. An agenda for these various activities is usually pre-established and approved by the review team lead and/or the accreditation agency before the visit.

With the shift to virtual visits, the nursing program needs to make some changes to these procedures. See Table 1 for a comparison of accreditation visits and Table 2 for a listing of strategies to overcome challenges of virtual visits. First, it is important to coordinate these activities with the appropriate team members and the accrediting agency. The accrediting agency may request a specific technology for the visit. It is important to determine what technology is available for the virtual visit and determine its suitability. The accreditation review team will probably want to conduct interactive synchronous video conference meetings with various constituents. Consider what platform or application to use for those meetings. Will Zoom, Skype, Microsoft Teams, GoogleMeet, Cisco Webex Teams, GoToMeeting, or will some other technology be preferred? Whichever platform is used, it is crucial to review the requirements, and ensure that security protection will prevent uninvited individuals from entering the meeting. It is also important for the nursing program to become familiar with the technology to be prepared for the interviews. These programs typically require a password or verification of the participant upon meeting entry.

Ensure that all members participating in these meetings know how to access and use this technology. Provide orientation and instructions for all participants that will be meeting with the site visitors. Share written instructions for access to the meetings that contain the links, passcodes, Instructional Technology (IT) contact support person, and a designated faculty or staff contact for the meeting. Also include the names, titles, and affiliations of meeting participants on the agenda; specifically, so that the reviewers will grant access to each person into the meeting. It is probably a good idea to test the technology before the scheduled meetings to ensure that everything works correctly and that all parties can use the technology without difficulty. Sending out a test email with a link access is a good method to confirm the technology of choice is working correctly prior to the visit.

When planning these video meetings, consider lighting, sound, background noise, location of these meetings, and internet connectivity. Rooms used for distance education delivery are ideal for these

Table 1
Comparison of In-Person Site and Virtual Site Visits

In-person site visit	Virtual site visit
Evidence rooms prepared for on-site visit in printed/electronic format	Supporting documents for evidence prepared and sent to reviewers prior to the visit. These documents are shared in electronic format with the exception of confidential faculty and student information
On-site interviews with school personnel, nursing faculty, students, and invited community members.	Interviews conducted using a video conference platform – Password and/or verification of each participant is required
Observation of class, clinical activities, and tour of campus	Live interactive video streaming or use of pre-recorded videos

Table 2
Challenges and Strategies for Virtual Site Visits

Challenges of virtual site visits	Strategy to overcome
Preparation of electronic evidence	Saving materials to: 1. USB drives 2. Learning Management Systems 3. A password protected data cloud (i.e., GoogleDocs)
Organization of supporting materials	Proper labeling and indexing of supporting materials as written in self-study report or on a prepared document list
Interviews with school and nursing personnel in the virtual setting	Use virtual video conferencing platforms Practice using the interactive video system prior to the virtual visit Send test email with link to a meeting
Managing interview setting	Ensure appropriate environment/setting Reduce background noise Use high quality camera, lighting, and video equipment
Addressing technology problems	Identify one person as the IT personnel to provide technology support during the visit Provide phone and email contact for IT support person
Ensuring the correct personnel, staff, faculty, or students are attending the correct meeting	Send calendar invitations with the meeting information (i.e., access information, room, link, dial-in, and access code)
Providing reviewer access to faculty and student files	Scan documents into a PDF file and share screen with reviewers
Observation of class, clinical activities, and tour of campus	Use live interactive video streaming or prepare pre-recorded videos

activities as they may already have microphones, multiple cameras, and display monitors available. It is a good idea to have back-up equipment or an alternate plan for technology should you encounter problems. Having IT backup personnel and support available can also be helpful for troubleshooting problems. It is strongly recommended to identify one person as the back-up IT personnel. Prior to each meeting it may be helpful to have a 10 minute technology check by the specific designated IT personnel to confirm all parties are prepared for the meeting. Therefore, be prepared to account for this time in the agenda per the accrediting organization recommendations.

Even though the reviewers will be engaging remotely, the meetings should resemble traditional in-person activities to the extent possible. In other words, this is not just the exchange of electronic documents, but the meeting will probably involve interactive questioning, sharing of screens to provide requested information, such as faculty and student file information, and overall engagement by participants. One strategy maybe to use calendar invitations through information managers such as Microsoft Outlook to invite each group to their designated meeting time. When providing the invitation include the access information, room, link, dial-in information, and access code to each group that meets with the reviewers. For example, faculty are not permitted to be present when the review team meets with students, so arranging this prior through a calendar invite creates a smooth transition from meeting to meeting. Again, having the designated IT personnel on stand-by is essential to create organization in the flow of the day.

When scheduling these meetings, consider the location of the team members. The reviewers may be in a different time zone than the nursing program, which could impact scheduling. Make sure that the agenda allows time for short reviewer breaks and lunch. Also, consider Internet connections and bandwidth issues. If certain times of the day are heavy Internet use times, it may be best to schedule large group meetings that require multiple connections by participants at other times.

Establish behavioral ground rules for meetings to ensure the video conferences goes smoothly. Allow only one person to speak at a time and avoid unnecessary side conversations. Check to make sure that the team and participants can adequately hear the speakers at each session's start. If possible, use microphones. Limit other background noise, such as the rustling of papers or people entering and exiting the room. Accreditors usually have guidelines that prohibit the recording of sessions, so ensure that the recording feature of the interactive video conferencing is off, and participants understand this expectation.

Another important factor to consider is the meeting environment. Since many faculty may be off-campus and working from alternate locations, be sure to remind those participating in the accreditation video meetings to limit background noise, such as pets, phone calls, family members, and doorbells. They should use the mute feature of the video conferencing system when not speaking. Also, encourage the participants to use a professional background, such as a plain wall. Participants, both faculty and students who meet with reviewers, may also need to be reminded about appropriate professional appearance. Proper clothing and appearance are expected. Share these helpful reminders and guidelines ahead of the visit in an email or other document that explains the visiting process to participants. To ensure faculty are prepared for the virtual site visit, nursing administrators may arrange mock visits with senior faculty or a consultant playing the role of the reviewer. These mock visits could be conducted via interactive video and would give faculty practice using the technology as well as responding to reviewer questions.

As part of their review to verify the self-study report, site visitors will need access to student and faculty files. These materials contain confidential information and may limit what can be shared with site visitors in public forums. Instead, a document camera or screen sharing may be needed to show the site visitors these private materials virtually during the visit rather than potentially providing access to unauthorized viewers. One method to make this part of the visit efficient is to scan the documents into one PDF file and then share the screen of that document with the reviewers. For example, on day one the reviewers may randomly select student names from a list of all current students in the program. Once the students are selected, scanning their required documents into one PDF creates a smoother method for sharing this information. Instead of showing one document at a time, sharing the screen and scrolling through the information creates more efficiency in the process. This works well for both student and faculty files. This is a nice method because the reviewers do not have access to all of the student or faculty files but can see requested documents via sharing the screen.

The review team will also need to observe a class, clinical activities, tour the campus, offices, classroom space, and other facilities. Planning for these activities will be needed. Site visitors can view a live in-person class through interactive video streaming. Or,

asynchronous class sessions, such as online learning modules or recordings, may be used. It is up to the nursing program to determine which method to use that will allow the visitors to get a glimpse of the class and the teaching. Reviewers will also need to evaluate clinical practice experiences. Determining how to highlight the clinical aspect of learning will also require some advance consideration. Nursing programs should contact the clinical site and discuss the possibility of a virtual site visit. However, due to privacy concerns, alternate clinical learning activities may need to be used for the virtual visit. One suggestion would be to contact the director of a clinical unit and discuss if a recording of specific areas of the clinical unit would be possible. For example, an empty patient room, the hallway (with no patients), the medication room, the conference room used for meeting with students could be recorded and shared. Then, once the reviewers meet with the director of the unit and staff, the focus can be on the interview itself and not the tour. This approach may save time and be more efficient. Approval from the accrediting agency is strongly recommended if this method is used as the tour of the clinical unit. Another alternative is for the site visitors to evaluate clinical learning by accessing clinical practice experiences occurring in clinical simulation or learning laboratory activities.

Lastly, site visitors usually need to view available facilities that are used by students and faculty. Faculty can be creative in the way they illustrate this for the review team. Preparing photos that could be embedded into a PowerPoint presentation, creating videos, or offering a virtual tour will help to demonstrate resources available. These photos or videos can be saved to the data cloud for reviewers to access easily.

Conclusion

Given the uncertain progression of the COVID-19 pandemic, educators may be faced with virtual accreditation visits and may need to adapt so that accreditation can continue. Accreditation provides programs and faculty opportunities to use a continuous improvement process to assess quality and ensure the attainment of established standards and this review cannot stop due to the pandemic. This manuscript provides helpful suggestions that faculty and programs should consider as they plan and implement virtual visits.

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