

Proper planning can lead to effective online accreditation visits across the globe

By MARVIN OXENHAM

In late fall of 2018 and early spring of 2019, the International Council for Evangelical Theological Education (ICETE) and The Association of Theological Schools (ATS) signed the “Playa Bonita Affirmations” outlining a partnership between both institutions. The first joint initiative that arose out of the partnership was a webinar held last month (and attended by nearly 35 ICETE and ATS accreditation officers and peer-expert evaluators from Asia, Africa, Europe, the Caribbean, and the US) that explored the possibility of online site visits amid the COVID-19 pandemic. The Global Awareness and Engagement Initiative of ATS is pleased to share this article—an expanded version of one of the presentations from that webinar. Inquiries may be directed to Lester Edwin J. Ruiz, director of accreditation and global engagement at ATS.

With the spread of the COVID-19 pandemic and the associated difficulties in conducting physical on-site accreditation visits, quality assurance agencies across the world are envisioning creative alternative approaches to this well-established practice. This brief article explores the conditions of possibility to conduct fully online site visits in external reviews for accreditation, quality assurance, and enhancement.

Develop policies and procedures

The first condition to establish is the development of relevant strategies and procedures for an online site visit. Governing boards and/or accrediting commissions need to produce policy documents that cover definitions of



fully online site visits and hybrid visits, the procedures for online visits (and how they will be different and/or similar to ‘regular’ site visits), and the conditions and procedures that must pertain to uncompromisingly satisfy existing quality assurance criteria.

Financial issues also need to be revised, as diminished expenses for travel and accommodation need to be weighed against the costs of appropriate technology and increased honoraria of visitation teams (should the online visits require more time). Once these policies and procedures are written, they should be formally approved and published.

Gain stakeholder input

Given the novelty of online site visits, it is important to gain the understanding and the trust of stakeholders. Every effort needs to be made, for example, to ensure that online site visits are not seen as ‘second best’ or as an unhappy compromise in times of duress, but are considered as a valid alternative.

A variety of stakeholders should be involved at the outset—the board/accrediting commission should formally approve the processes and policies; institutions should be given an opportunity to share concerns, request clarifications, and even apply for deferrals of the review cycle if they are unhappy with an online visit; and students should be consulted to ensure their confidence in the process. Lastly, but most importantly, national or regional legislation must be consulted to ensure that online site visits are a legally permissible alternative.

Provide training

Because most peer experts are likely inexperienced in this kind of work, the agency needs to deliver adequate training to provide knowledge and understanding of new policies and procedures but also to develop the specific competences required for online site visits. Agencies should provide training materials, online courses,¹ and/or training events, and they should require visitation teams to complete this training before engaging in online site visits. The training should also be made available to institutions receiving the visits.

Revise visitation planning

The timing, planning, and scheduling of online visits requires careful revision. Expectations around timing, for example, need to be reconsidered given that an online site visit typically takes more preparation time—both for the team in examining documentation and for the institution in producing self-evaluation reports and supporting evidence. Successful online site visits, in fact, rely heavily on the quality of the documentation—perhaps even more than regular visits.

The planning of the visit also requires re-thinking, given that the ‘three-day site visit’ that is normally used in onsite visits is unlikely to provide the best model. Good planning should consider, for example, a ‘pre-visitation’ phase with a substantial exchange of questions and answers between the team and the institution (followed by the actual ‘visit’ that focuses more on clarification, collection of further evidence, and enhancement). The daily

¹ The ICETE Academy nanocourse, [Online Site Visits](#), is an example of an online training course (Registration is needed to enroll in the course. Email director@icete.academy for more information.).

scheduling of online site visits should also be revised, featuring shorter sessions, longer breaks, fewer hours of meeting each day, and probably more days than a typical visit.

Cover for additional roles

Online site visits call for new roles both in the visitation team and in the receiving institution. An IT assistant, for example, should be involved before the visit and during the visit to make sure that the technology is working properly, that the video conferencing system is trouble free, and that backup measures are in place if things don’t function as planned. The visitation team might also benefit from a ‘notetaker’ who can focus on accurately taking minutes during virtual interviews and meetings.

In addition, the institution might consider engaging staff or students as ‘video reporters’ to show the physical site of the school or to offer snippets of classrooms and extracurricular activities that are otherwise difficult to capture.

Take care of IT infrastructure and guidelines

The adequacy of the IT infrastructure, communications systems, software, and hardware are essential conditions for an online site visit. Agencies and institutions alike should invest in connectivity and devices. Document-sharing systems that are intuitive, functional, appropriately safeguarded, and well-organized should be in place. Guidelines for using the chosen technology should be provided alongside online meeting netiquette.

Develop strategies for what is lost

There is no doubt that some things will go missing during an online site visit, and it is important for quality assurance agencies and peer experts to consider how to make up the loss.

Members of visitation teams typically report, for example, the added value of the ‘personal touch’ that comes with informality. Often, the ‘sense’ of an institution is felt at meals, social events, or through unplanned conversations

during coffee breaks more than during structured meetings. To make up for this, icebreaker video calls could be scheduled, or separate breakout rooms can be designed for informal chats as each participant drinks her/his preferred brand of coffee or tea at home. The visitation team might also be provided with a separate online meeting room to connect, to debrief informally, and to relax with one another.

Further, in recognition that too much technology can forfeit the simplicity of a site visit, care must be taken to keep technological procedures and tools as straightforward as possible without unnecessary complications. Also, it is not a good idea to record the proceedings of the visit—this is not done for an in-person site visit and doing so can stilt conversations and infringe on data protection and privacy issues.

Agencies should also recognize that travelling and engaging with new places and people is an important motivating factor for peer reviewers. In the absence of this motivation, other perks might creatively be devised.

Safeguard the main purpose of the visit

Accreditation agencies and visitation teams must find ways to preserve the purposes of the site visit within the overall accreditation process in whatever format the site visit takes place. Online visitation teams must continue to pierce the rhetoric of written reports, praise good practice, corroborate information from different sources, verify compliance to standards, breed comparability within the sector, enhance stakeholder trust, facilitate advisory relationships, exchange ideas of good practice, and generate clear requirements and recommendations.

The final review report that is produced following an online site visit should acknowledge the modality of the visit, but otherwise remain identical to reports generated from a typical in-person site visit. Likewise, accreditation commissions receiving the reports and making accreditation decisions should not discriminate toward online site visits but consider them as equivalent procedures.



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