



Guidelines and Protocols for Virtual Audit Site-Visits

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Virtual Site-Visit Duration (two and one half-days)

- To reduce the effect of ‘screen fatigue or screen gloom’.
 - o Build breaks in between meetings to reduce the ‘screen effect’ (10-15 minutes for the auditors to step away from the computer).
 - o Auditors should use the time to step away from their device and relax.
 - o Use that time for participant troubleshooting, if applicable.
 - o These breaks are also required by the facilitator to let in and move electronically each participant from the main room to the proper interview (breakout) room between each meeting.

College: When Preparing the Agenda/Selection and Number of Stakeholders

- As with in-person site-visits, the college prepares various stakeholders (agenda, meetings, preparation packages, emails) for participation in the audit.
- Meeting participation:
 - o Balance students in programs/sample programs (choose the right representation).
 - o Less than 13 people in a stakeholder group to keep the group together and focused.
 - Participants are invited to join the platform 15 minutes before the start of the meeting, in order to allow the facilitator to welcome them, do any required troubleshooting with their audio and video, give them instructions and move them into the interview meeting on time. Because of this, it will not be possible for participant to join the meeting once it has started.
 - o The Final Agenda should contain the names and positions of all participants.



College: Recording of meetings

An interview meeting will be recorded only if one or more of the panel members gets dropped from the interview meeting. These are the parameters that will be followed:

- Only the interview meeting that the panel member(s) got dropped from will be recorded;
- The facilitator will indicate when the recording starts and when it stops;
- Recordings will be done by the OCQAS moderator only;
- The recordings will be kept on a computer by the OCQAS moderator (they will not be saved in the cloud);
- The recordings will be shared with the audit panel members only, and only for the purpose of writing the college's audit report;
- All audit panel members have signed a confidentiality agreement so that no information shared (audio, video, documents, etc.) during the audit process can be shared with others outside the audit panel group – this includes the meeting recordings;
- The audited college will not have a copy of the recordings. These are considered confidential and proprietary of OCQAS;
- Once the final college audit report is approved by the OCQAS Management Board, the recordings will be destroyed by the OCQAS recording holder.

College: Selecting IT to Use and Support

- No later than two weeks before the site-visit:
 - o Select the tool to use.
 - o Develop user instruction, manuals, contact information.
 - o Offer to each member the possibility of accessing a 15 minute trial meeting, according to a published availability timetable, so that they can familiarize themselves with the virtual meeting environment as well as with the protocols put into place for the meetings.
- One week before the site-visit:
 - o Send virtual invitations to each member of the groups, based on the list sent by the college (that list includes names, titles and emails of each member).
 - o Hold 15 minute meetings with members who expressed their desire to practice this type of meeting, according to the published availability timetable.
 - o IT connects with all of the stakeholders to conduct a short test of their connection, providing tips for effective video conferencing and providing troubleshooting guides.
- During the site-visit:
 - o IT support is provided throughout the two and one-half days of the site-visit (they are not intrusive or obvious on the call).



Participants/Audit Panel Members: How to be Prepare for the Virtual Site-Visit

- I. One to two weeks before the Site-Visit:
 - a. Familiarize yourself with the selected tool.
- II. The night before the Site-Visit:
 - a. Find a private area and prepare your space:
 - i. Decide on the device you will use for the session.
 - ii. Leave your headphones or earphones close.
 - b. Computer housekeeping:
 - i. Re-boot your system.
 - ii. Check all your settings, test your audio and video (if possible check your audio and video USING the anticipated platform).
- III. The day of the meeting:
 - a. Turn off and quit other applications, especially the ones that might compete for the mic and the camera (e.g. other video conferencing, chat and collaboration tools).
 - b. Come online 10 to 15 minutes early before the anticipated start time (contact the IT representative if you have any troubles logging in).

Participants: During the Meeting

- I. Beginning of the meeting:
 - a. Leave your computer/phone microphone off unless required.
 - b. Use Headphones or earphones to listen.
 - c. You may be placed in a “waiting room” before being admitted. Please be patient.
 - d. Your microphone will be muted upon entry. **Please stay muted unless speaking.**
 - e. **Enable the Participant window** by clicking the ‘Participants’ icon in the toolbar shown below. The Participant window will open at the side of the screen.
 - f. **Enable the Chat window** by clicking the ‘Chat’ icon in the toolbar. The Chat window will open at the side of the screen.
 - g. Type your name and department in the meeting chat to introduce yourself and identify your presence.
 - h. Use the Non-Verbal feedback tool (at the bottom of the participant window) to:
 - Raise Hand – for a turn to speak.
 - Yes / No – to express agreement / disagreement.
 - Go Slower / Faster.
 - Thumbs Up / Down.
 - Clap.
 - Need a Break (coffee cup).
 - Away (clock) – if you need to step away from the session.
- II. Wait for the Panel Chair/Facilitator to call you by name to introduce yourself or speak.
- III. Unmute microphone when asked to speak.
- IV. Mute your microphone when you are finished speaking.



Audit Panel Members: During the Meeting

- I. Start your video camera by clicking the “Video” button on the toolbar.
- II. Unmute the microphone when you need to speak, by clicking the “Unmute” button on the toolbar.
- III. The Panel Chair/Facilitator will determine when to allow participants into the meeting.
- IV. The Panel Chair/Facilitator will review the online session etiquette with all participants at the beginning of each meeting.

OCQAS Moderator

During the meeting:

- I. Manage the virtual meeting (creation of the meetings and of the breakrooms, welcoming the participants, transferring the participants into the appropriate breakrooms, record the meeting when necessary) so that the Chair/Facilitator can fully engage in session discussions.
- II. Monitor non-verbal feedback & chat activity.
- III. Maintain speakers’ queue, as per raised hands.
- IV. Alert the session Chair/Facilitator to raised hands and questions posed in chat.
- V. Share screen & documents as needed.
- VI. When needed, will let the participants know when the recording of the meeting starts and when the recording of the meeting finishes.