# The Out-of-State Learning Activity Compliance Organizer and Checklist

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#### Pre-Test

- Who has a Twitter account and knows how to use it?
  - If no one at your table has a Twitter account, you can use a post-it note
- #comply123
- You will select 3 items from a list of items numbered 1-10.
   You have 3 minutes to come to consensus and post your answers.
- Send identification number of your answers
   You will send us 3 numbers, 1-10.
- First 3 groups to respond correctly get a prize!

What are the first three things one should do when implementing a compliance strategy at an institution? Time is up! 3m 2m 30 20 10 9 8 7 6 5 4 3 2 1



Introducing......

Out-of-State Learning Activity Compliance Organizer and Checklist

NASASPS Conference ∞ April 16, 2019

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Purpose of Out-of-State Learning Activity
Compliance Organizer and Checklist

- User-friendly guide
- To-Do list and tracker
- Master with links to supplemental documents

## Organizer and Checklist Categories

- Leadership
- Institutional Policy
- Process Management
- Short Courses/Residency Programs
- Fully Distant Students
- Experiential Learning Placements (or Supervised Field Experiences)
- Licensure Programs

### Organizer and Checklist Details

- Excel spreadsheet (easily sortable)
- Customizable and shareable (CC-BY-NC-SA license)
- 7 categories42 tasks

- 42 tasks
   Data for each task
   Category
   Gategory Sorting Code
   Category Sorting Code
   Important Details/Notes
   Ideas for How to Complete Tasks
   General Supplemental Resources
   Institution-Specific Resources
   Institution Notes
   Target Date for Completion
   Person/Group Responsible
   Completed/in Place (Y/N)

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The <i>Organizer and Checklist</i> in Action	
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### JMU Organizer and Checklist

- Big picture and small details
- Will serve as a guide and record for the next person

- It's helped me to....

  Keep things straight

  Check off what was already in place (endorphin)

  Identify 3 primary issues/groups to address first

  identify who should be involved

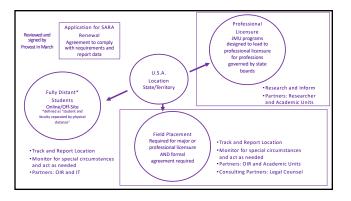
  identify who needs what information

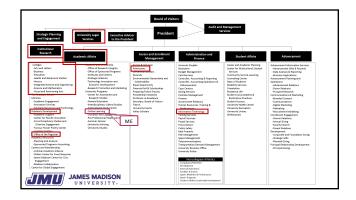
  Identify/create processes for tracking, data collection, and reporting

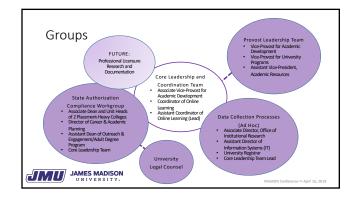
  Determine items that can be addressed in the background and/or later (e.g., creating a policy)

  Record notes, update, and link to reference documents
  - Record notes, update, and link to reference documents











How can Smartsheet make tracking progress in my institution	n's
distance learning compliance more efficient?	

- Create deadlines (annual renewal, semester check ins with departments, bimonthly meetings, annual training, etc.) and incorporate into a shared calendar.

  • Save files, comments and emails related to each task
- Create a top level dashboard to share with stakeholders for transparency
- Prioritize different tasks according to need
- Create an update request to follow up on unfinished tasks (i.e., contact information changed for a dept. chair)

  • Upload/download data in Excel and Word
- Integrates with O365 and Teams (I've not yet tested the new Teams feature)





## Let me show you how



#### **FUTURE POSSIBILITIES**

- Creating forms for end users to add data, such as a new internship course or contract with an out of state organization for experiential learning  $% \left( 1\right) =\left( 1\right) \left( 1\right$
- Customizable reports user generated according to discipline/state for reciprocity requirements in a field; granular reports by semester/CIP code/program/state  $\,$
- Create dashboard with ready to use information and resources for prospective and current students
  - Set Alerts and Actions on key dates for reminders to stakeholders

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Revise and share revisions	
Build a database for large-scale programs/large institutions	
Regular updates	
Sub-checklists/Other checklists	
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Questions and Suggestions	
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