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

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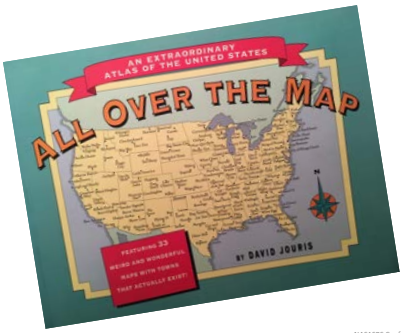
Pre-Test

- 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
- Rules
  - 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!

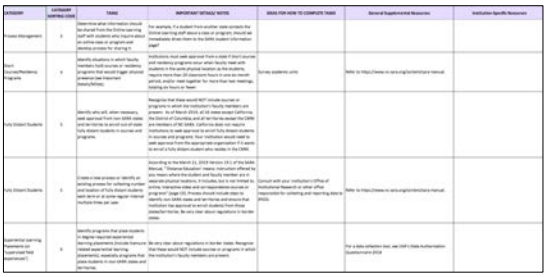
3m 2m 30 20 10 9 8 7 6 5 4 3 2 1



Introducing…….

Out-of-State Learning Activity Compliance Organizer and Checklist

Out-of-State Learning Activity Compliance Organizer and Checklist (version 2.0)



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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 categories
- 42 tasks
- Data for each task
  - Category
  - Category Sorting Code
  - Task Description
  - 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)

The *Organizer and Checklist* in Action

My Goal:
To get things in order and pass it on

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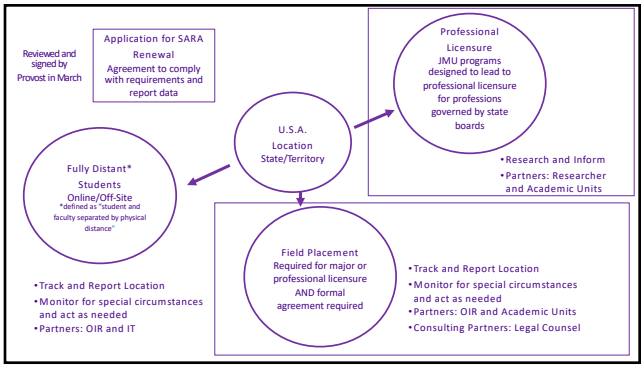
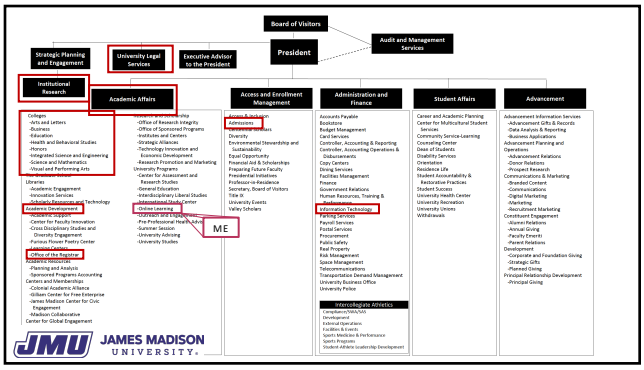
JMU Organizer and Checklist

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




Board of Visitors
President
Audit and Management Services
Strategic Planning and Engagement
University Legal Services
Executive Advisor to the President
Institutional Research
Academic Affairs
Access and Enrollment Management
Administration and Finance
Student Affairs
Advancement
ME
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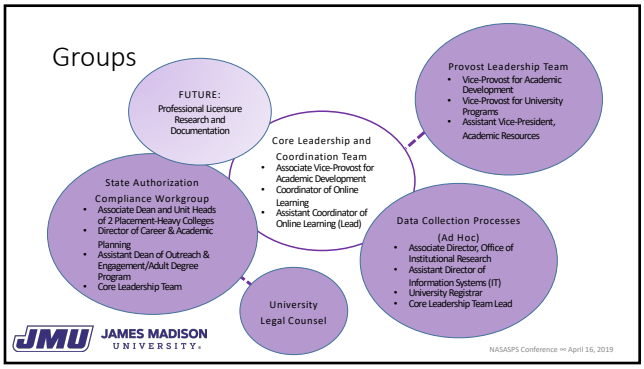
Groups
FUTURE:
Professional Licensure Research and Documentation
Core Leadership and Coordination Team
Associate Vice-Provost for Academic Development
Coordinator of Online Learning
Assistant Coordinator of Online Learning (Lead)
Provost Leadership Team
Vice-Provost for Academic Development
Vice-Provost for University Programs
Assistant Vice-President, Academic Resources
State Authorization Compliance Workgroup
Associate Dean and Unit Heads of 2 Placement-Heavy Colleges
Director of Career & Academic Planning
Assistant Dean of Outreach & Engagement/Adult Degree Program
Core Leadership Team
Data Collection Processes (Ad Hoc)
Associate Director, Office of Institutional Research
Assistant Director of Information Systems (IT)
University Registrar
Core Leadership Team Lead
University Legal Counsel
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NASASPS Conference ∞ April 16, 2019

DISTANCE LEARNING COMPLIANCE PROCESS MANAGEMENT
Tracking your distance learning compliance universe
Cheryl Carroll
Manager of Academic and Distance Education Compliance
UNIVERSITY of VIRGINIA

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

- Create deadlines (annual renewal, semester check ins with departments, bi-monthly 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)

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Let me show you how

https://app.smartsheet.com/sheets/5w3PrW2VwxcgiQqWRPqJRMV5V53G3VXM3G73cmh1?view=grid

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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
- 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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http://www.jmu.edu/online/state-authorization/checklist/

Opportunities

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

Questions and Suggestions

Contact Information

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