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
  - 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!
Introducing....... Out-of-State Learning Activity Compliance Organizer and Checklist
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
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

Professional Licensure
JMU programs designed to lead to professional licensure for professions governed by state boards

Field Placement
- Required for major or professional licensure
- MAY or formal agreement required

U.S.A. Location
State/Territory

*Defined as “student and faculty separated by physical distance”

Application for SAR
Agreement to comply with requirements and report data

Renewed and approved in March

Research and Inform
- Partners: Researcher and Academic Units
- Monitor for special circumstances and act as needed

Consulting Partners
Legal Counsel

U.S.A. Location
State/Territory

Field Placement
Required for major or professional licensure
AND formal agreement required

Supervised and On-site

Track and Report Location

• Monitor for special circumstances and act as needed
• Partners: OIR and Academic Units

Research and Inform
• Partners: Researcher and Academic Units

Track and Report Location
• Monitor for special circumstances and act as needed
• Partners: OIR and Academic Units

• Consulting Partners: Legal Counsel
DISTANCE LEARNING COMPLIANCE PROCESS MANAGEMENT

Tracking your distance learning compliance universe

Cheryl Carroll
Manager of Academic and Distance Education Compliance
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 Office 365 and Teams (I’ve not yet tested the new Teams feature)

Let me show you how

https://app.smartsheet.com/sheets/7e43745f74c38b1e483bdf53401c3f76?view=grid

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
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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