Guidance for reviewers: Conducting online review meetings

1   This document is intended to provide reviewers (referred to in some methods as assessors) with an outline of how online reviews will be set up and run, details of the meeting format and protocol, and some top tips for getting and staying online. This guidance is applicable to all methods delivered by QAA and may be supplemented with method-specific information from your QAA Officer.

2   All online meetings held during a review will be hosted by QAA and conducted through a QAA-approved and supported platform (normally Microsoft Teams or Zoom). Reviewers must therefore ensure that they have access to the latest version of the platform through their device (see annex 1).

Setting up meetings

3   The programme for the visit will be discussed and agreed between the team and the institution under review. When planning meetings, teams are advised that online meetings are often more productive with small groups of 8-12 participants (meetings should not normally exceed 20 participants, including the team). Online meetings will be set up by the administrative team or the QAA Officer assigned to the review[1] in accordance with the agreed visit programme.

4   For the private meetings of the team, one online meeting may be set up which will remain open for the full day on each day of the visit. This meeting will be clearly titled, such as 'Team-only meeting' or 'Private team meeting' to differentiate it from other meetings and will allow team members the flexibility to join the private team meeting at any time. For example, if institutional meetings finish early, the private team meeting will be accessible. Alternatively, your QAA Officer may set up separate meetings either side of each meeting with the provider for the team to meet privately to prepare and debrief. Note that, in line with information security and data protection policies, the 'chat' function in all meetings should not be used for any substantial discussions about the review itself; instead those discussions should take place verbally in private team meetings or in writing via the Review Extranet Discussion board.

5   Meetings with institutional staff and students will be set up as separate meetings at the times stated in the visit programme. The names, titles and responsibilities of those involved in each meeting will be confirmed by the provider in advance of the visit in the normal way. Meeting invitations will usually be sent (by the admin team or the QAA Officer) to the reviewers and also to the institutional contact/facilitator for them forward to the participants joining the meeting from the provider's side. We ask reviewers to join the meeting at least 5 minutes in advance of the start time so that the QAA Officer can admit the team to the meeting and start the meeting on time. All participants will have been advised to arrive five minutes before the official start to ensure any issues can be addressed and the

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[1] For QESR in Scotland, meetings will be set up by the ARC admin team. For all other reviews, meetings will be set up by the QAA officer leading the review.

meeting can start promptly. Guidance, including joining instructions and background information, should have been sent to each institutional participant by the QAA Officer via the institutional facilitator.

6   For each meeting, a designated person within the team will check that the list of participants waiting in the lobby matches the list of invited attendees before admitting them to the meeting. The designated person should be agreed in advance of the meeting and may be the QAA Officer, a reviewer or a member of the admin team.[2] Where this is a reviewer, it is advised that this individual does not take part in asking questions during the meeting. The participant list in the online view should be monitored during the meeting to note if individuals leave the meeting or if others join. Where an uninvited participant seeks to join the meeting, the Chair should be alerted and asked to ascertain whether this person can be present before proceeding.

Meeting format and protocol

7   The review meetings with higher education institutions provide an opportunity for the team to engage in discussion with staff, students and other stakeholders, and therefore it is important that everyone in the meeting has an opportunity to contribute to the discussion. These meetings are a formal part of the review method.

8   Meetings will not be recorded using the 'record' function in the online platform. As with all meetings, detailed notes of the meeting will be taken which act as the official record. For QESR, the official record is taken by the Coordinating Reviewer and in other methods this is undertaken by the QAA Officer. Everything said in the meetings will be anonymised. The notes of the meeting form the formal record of the review and are saved on the secure QAA Review Site and will not be shared with the provider.

9   A member of the team should be assigned the Chair role for each meeting. The Chair should monitor any comments on the 'chat' function (if used, as this can be disabled), as well as watching if participants 'raise their hand' physically or electronically. The 'chat' function should only be used for comments relating to the management of the meeting (for example to flag connectivity issues) rather than for posting answers to the questions raised. All answers to the questions posed by the team should be made verbally so these can be captured in the formal note of the meeting. Reviewers should also only use the chat function for comments relating to meeting management and are advised to use the 'private' option to direct these to individual reviewers rather than share these on the main chat which is visible to all participants.

10   At the start of an institutional meeting, all participants from the institution will wait in the 'waiting lobby' to be admitted. Once admitted, participants should begin with their video on and microphone off. Each participant will switch their microphone on in turn for the introductions (if introductions are required), as instructed to do so by the meeting Chair. Introductions should be brief and all participants (other than the Chair) should mute their microphones afterwards. Muting is particularly important to prevent potential background noise and feedback issues during the meeting. If participants are experiencing broadband issues, they should try switching their camera off to improve connectivity.

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[2] For QESR, this with be a member of the ARC team who will be present for the start of the meeting and then leave, directing any subsequent queries (for example, if a participant does not show up for the meeting) to the institutional contact and QAA Officer. Before leaving, the ARC member will assign all members of the team the same permissions as the meeting organiser, allowing them to admit people from the lobby (see Annex for more details).

11   The meeting should be conducted in line with the standard protocol that applies to all onsite or online meetings (see guidance on *Conducting effective meetings*). In addition, all participants should be reminded at the start of the meeting that for online meetings:

- microphones should be muted until invited to speak by the Chair
- the 'raise your hand' facility should be used to indicate when a person wishes to ask or answer a question
- other electronic devices should be kept away from the microphone to minimise interference
- the 'chat' facility should only be used for issues relating to meeting management (for example, notifying others of poor connection, audio issues or an intention to speak) rather than for posting answers to the questions raised. All answers to the questions posed by the team should be made verbally and captured in the formal note of the meeting.

12   It is best to wait for a natural pause in the conversation before speaking to avoid cutting across anyone already talking. The Chair will monitor this and where necessary may take the lead in directing/encouraging who should respond to particular questions. Similarly, it may be helpful for the institutional contact/facilitator to guide the team on who is best placed to contribute. Please remember, it is not as easy to realise when a speaker has finished in a virtual environment, therefore, it can be helpful to tell the group when you have finished speaking to avoid interruptions.

13   The team should not hold any private discussions within an institutional meeting even if it appears that all external participants have left. Reviewers should all exit the meeting and conduct any private discussions and reflections on the meeting in the separate, private 'team only' meeting. Similarly, reviewers should avoid using the chat function to privately message team members during a meeting except for messages relating to meeting management (for example, indicating that they wish to pursue a point or time-keeping reminders). Be careful what you say even when using the mute button.

14   Reviewers, key institutional contacts and the QAA Officer should share mobile numbers and email addresses at the start of the review so that if there are any unexpected technology issues with either the QAA Review Site or the online meeting platform, communications can take place to quickly resolve issues. The exact form of communication should be established in advance of the meeting, and whether there are alternative methods of joining the meeting (for instance, by phone). The meeting will continue as planned if someone loses their connection or has a problem, however, if would be helpful if the institutional contact/facilitator indicates whether this will have a negative impact on answering the question, so the meeting can come back to it later on when hopefully the person has rejoined the meeting.

15   Meetings between the institutional contact/facilitator and QAA Officer held during the visit are an opportunity for both parties to check in on how well the meetings are going. It is an opportunity for both parties to offer further clarification and confirm that the team has all the required information.

Annex 1: Top tips for getting and staying online

If possible, we recommend that you use a headset - this will often provide you with clearer audio than the built-in speakers of your laptop or PC.

A basic broadband connection should be sufficient to engage with Teams and Zoom. If your wi-fi connection is not always stable, you may wish to use an ethernet cable to plug your computer directly into the router.

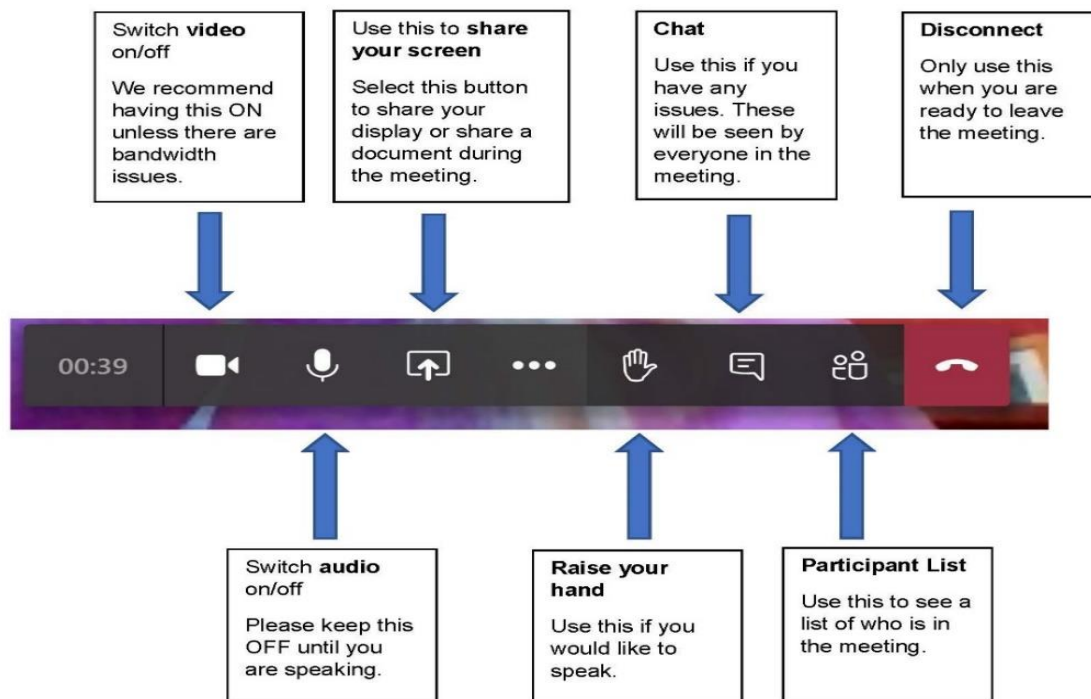See below for guidance on using Microsoft Team and Zoom.

Microsoft Teams

If possible, use the downloaded desktop app version of Teams rather than the web app version in your browser - we have found that this is a more stable platform. If you do not have the Microsoft Teams app installed on your desktop, phone or tablet, you can join the meeting through the online version of Microsoft Teams by clicking on the link that will appear after you have accepted the meeting invitation. We would recommend using the Microsoft Edge browser to access Teams, as other browsers are not fully supported. This will take you to the Teams page (see below) where you will be asked whether you want to open Teams.
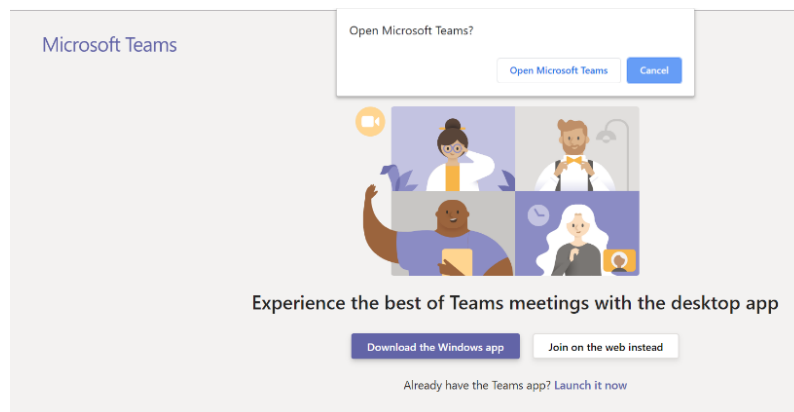
To admit participants, click 'Admit' on the small window that appears on your screen or 'admit' participants via the 'Participants list'. If you click 'View lobby', you will be able to see the list of participants and can admit these by clicking the 'tick' beside the participants name.
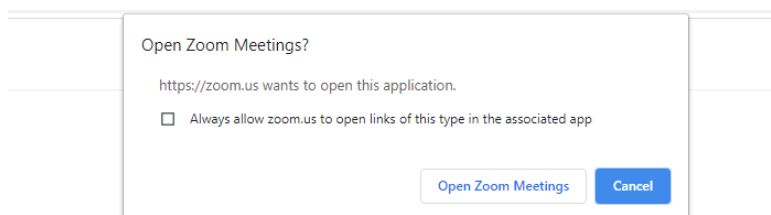
- If you would like to know more about using MS Teams, there are helpful videos at: https://support.microsoft.com/en-us/office/microsoft-teams-video-training-4f108e54-240b-4351-8084-b1089f0d21d7

- Specifically, about joining meetings: https://support.microsoft.com/en-us/office/join-a-teams-meeting-078e9868-f1aa-4414-8bb9-ee88e9236ee4

- Specifically, about information on permissions for each role - organiser, presenter and attendee - and how to change roles: https://support.microsoft.com/en-us/office/roles-in-a-teams-meeting-c16fa7d0-1666-4dde-8686-0a0bfe16e019

Here is a diagram of the settings available to you during Teams meetings:

| Switch **video** on/off | Use this to **share your screen** | **Chat** | **Disconnect** |
| We recommend having this ON unless there are bandwidth issues. | Select this button to share your display or share a document during the meeting. | Use this if you have any issues. These will be seen by everyone in the meeting. | Only use this when you are ready to leave the meeting. |

| Switch **audio** on/off | **Raise your hand** | **Participant List** |
| Please keep this OFF until you are speaking. | Use this if you would like to speak. | Use this to see a list of who is in the meeting. |

Zoom

If possible, use the downloaded desktop app version of Zoom rather than the web app version in your browser - we have found that this is a more stable platform. If you do not have the Zoom app installed on your desktop, phone or tablet, you can join the meeting through the online version of Zoom by clicking on the link that will appear after you have accepted the meeting invitation. (Zoom should work well on any modern web browser such as Chrome, Safari or Microsoft Edge.) This will take you to the Zoom page (see below) where you will be asked whether you want to open Zoom.

Open Zoom Meetings?

https://zoom.us wants to open this application.

☐ Always allow zoom.us to open links of this type in the associated app

Open Zoom Meetings   Cancel

Click **Open Zoom Meetings** on the dialog shown by your browser

If you don't see a dialog, click **Launch Meeting** below.

Launch Meeting
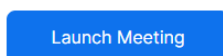
Don't have Zoom Client installed? Download Now

- To admit participants, click 'Participants' at the bottom of the meeting window. You will be able to see the list of participants and can choose to admit individuals or everybody depending on your preference.

- If you would like to know more about using Zoom, there are helpful short tutorials and videos at:
https://support.zoom.us/hc/en-us/categories/200101697

- Specifically, about joining meetings:
https://support.zoom.us/hc/en-us/articles/201362193-Joining-a-meeting

- Specifically, about information on permissions for each role - organiser, presenter and attendee - and how to change roles:
https://support.zoom.us/hc/en-us/articles/360040324512-Roles-in-a-meeting

- Specifically, about information for getting started with various different devices including laptops, pads and phones and the setting available to you during meetings:
https://support.zoom.us/hc/en-us/categories/200101697-Getting-Started

Reviewer Management Group, April 2022