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# Inaugural Review of Quality Assurance in Education and Training Boards

## Technical Guidelines for Virtual Review

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## Introduction

The uncertain trajectory of future COVID-19 restrictions requires that QQI adapt its procedures relating to the inaugural reviews of quality assurance in education and training boards to include virtual review visits. This facilitates the continuation of the review process.

The purpose of this document is to provide operational guidelines on utilising a virtual platform, Microsoft Teams, to the review teams, the education and training boards and other stakeholders involved in the review visit meetings to enable all to carry out their functions and roles within the review process.

Note: Microsoft Teams is the platform for communication for this review process and all technical guidance provided below relates to this platform.

The role and functions of each member of the external review team are outlined in the Review Handbook, and advice and guidance for reviewers is also provided in additional review team briefing material. These remain unchanged. However, virtual meetings create different situations that require a modified approach, as well as modified operating principles and guidelines.

Conducting the main review visit remotely through a virtual platform creates the need for additional technical support for the review team and meeting participants. This function will be carried out by QQI. Although this requires QQI personnel to be present during meetings, these individuals are not participants in the meeting and are present in a supportive role only.

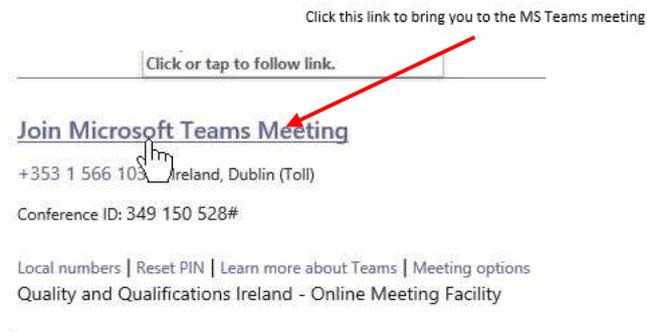


## 1. General guidelines for all participants

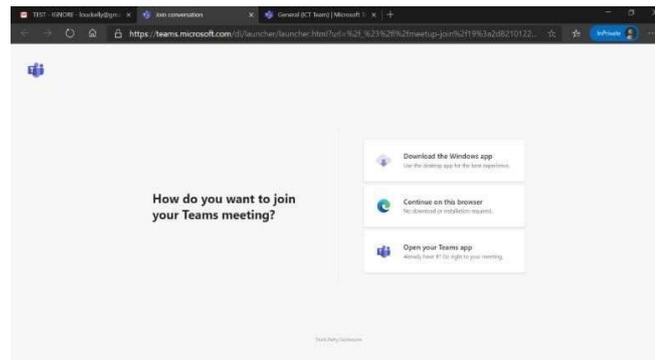
### Prior to the meeting

1. See below how to join a meeting from invitation using Microsoft Teams

- a Click on the 'Join Microsoft Teams Meeting' hyperlink in the meeting invitation



- b When you select 'Join Microsoft Teams Meeting', you will be prompted to choose how you want to join the Teams meeting. It is recommended that you select 'Continue on this browser'



- c Join the meeting by clicking on the **Join Now** button 10 minutes before commencement. This should allow time to identify any technical problems and stakeholders to join the meeting.

Please note: the review team will be admitted first. If you are an ETB representative/stakeholder, you may need to wait in the lobby for a period of time until the full review team has been admitted to the meeting



- d Please ensure that you enter your full name and affiliation/role when MS Teams prompts you for your name.
- e You can switch on and off your camera and/or microphone as set out below



- 2 If you have internet connectivity issues, you should communicate this with your contact person(s) (for review team members, this will be QQI/the coordinating reviewer; for ETB representatives and stakeholders, this will be the ETB review coordinator) by phone/text. If the connectivity issues cannot be resolved, you may need to dial into the meeting session using the phone number and PIN provided in the meeting invitation.

The phone number and conference ID are directly under the meeting link. The conference ID is unique to each meeting session.

**Join Microsoft Teams Meeting**

+353 1 566 1035 Ireland, Dublin (Toll)

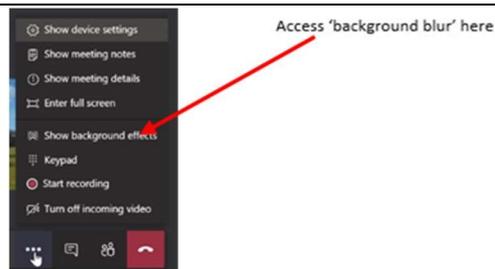
Conference ID: 286 927 237#

Local numbers | Reset PIN | Learn more about Teams | Meeting options  
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**During the meeting**

- 1 When not speaking, make sure your microphone is muted. This will prevent inadvertent noises, such as coughs, rattling papers, or squeaking chairs, from interrupting others.

- 2 Keep the chat side bar open and use it to highlight any problem that requires technical support (see image at 1 (e) above).
- 3 It is important to remember that, if your camera is turned on, all attendees will be able to see you and your surroundings during the meeting. It is recommended that you use background blur (accessible through 'show background effects' via the 'additional options' button) to minimise distractions

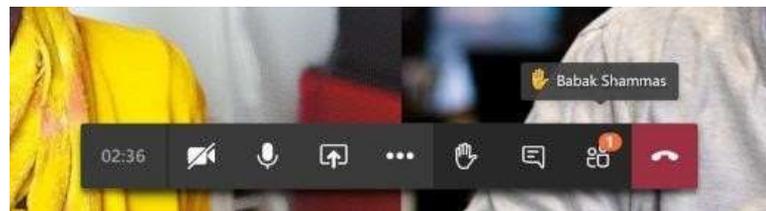


- 4 If you wish to raise a point or add an additional response to a question during the meeting, you can indicate your intention to the chair using the 'raise hand' function

Select Raise your hand  in the meeting controls

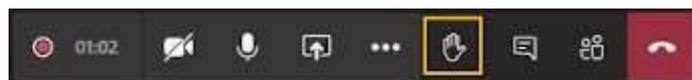


Everyone in the meeting will be able to see that you have your hand raised



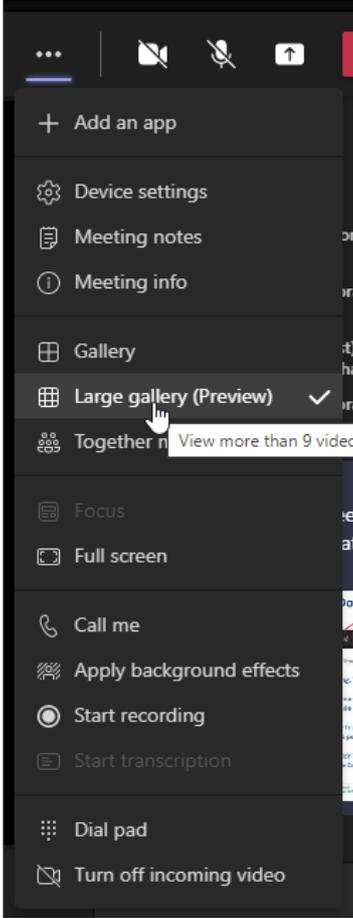
The chair will monitor this and will invite participants to speak where appropriate.

- 5 Once you have made your point, select Lower your hand in the meeting controls.



- 6 Avoid anything that might be a distraction to you or other participants. This includes eating or noise from phones / email.



	<p>7 If you wish, you can use 'large gallery' view to see more than 9 video feeds on-screen at once</p>  <p>The screenshot shows the Zoom mobile app settings menu. The 'Large gallery (Preview)' option is selected, indicated by a checkmark and a hand cursor. A tooltip next to it says 'View more than 9 video feeds on-screen at once'. Other options include 'Add an app', 'Device settings', 'Meeting notes', 'Meeting info', 'Gallery', 'Together n...', 'Focus', 'Full screen', 'Call me', 'Apply background effects', 'Start recording', 'Start transcription', 'Dial pad', and 'Turn off incoming video'.</p>
<p>After the meeting</p>	<p>1 Leave the meeting when instructed to do so by the chair.</p>  <p>The screenshot shows the bottom navigation bar of the Zoom mobile app. It contains three icons: a chat bubble, a group of people, and a red button with a white telephone handset icon. A red arrow points to the red button, with the text 'Leave the meeting' written above it.</p>



## 2. Guidelines for all review team members

### Prior to the meeting

1. Follow the **General Guidelines** in respect of joining the meeting, connectivity, etc.
2. An MS Teams background is available for use by review team members if required. The advantage of the background is that team members can be identified by meeting participants at a glance. If the team agrees to use the background, we recommend that all review team members use it.
3. Review team members must ensure that they have all relevant meeting links prior to commencement of the main review visit. Meeting links are accessible in the Outlook calendar invitations that you will receive from QQI; they are also included in the main review visit timetable. If you need any meeting links to be re-sent, you should communicate this directly to QQI, or via the coordinating reviewer.
4. It is recommended that the review team establishes a means of communicating non-sensitive information with each other privately during the review visit (and particularly during meeting sessions). With the agreement of all team members, the coordinating reviewer may set up a WhatsApp group for this purpose.
5. A private meeting of the review team will be scheduled for a period of approximately 30 minutes prior to each ETB/stakeholder session. These meetings will take place in the private review team meeting space, which will appear in your calendar as an all-day meeting invitation.
6. The lead team members, including note-taker, and topics for discussion should be agreed by the review team. The lead team member(s) for each session is/are responsible for proposing a list of indicative questions in advance of the session. These are agreed by the team and approved by the chair. Planned questions and notes should be saved in the relevant Meeting Records document in the Review Team's Working folder.
7. It is recommended that one team member take responsibility for monitoring the chat sidebar/hands-up feature. This may be the same team member each time or it may change from meeting to meeting. In the event that the chair/lead team member appears not to have noticed a raised hand/message, this may be communicated to the chair/lead team member via the review team WhatsApp group.
8. If any of the team members are absent from the meeting, contact them through the team's private WhatsApp group. If the team member does not subsequently join the session, you should contact them directly. Inform the chair and QQI of any absences.
9. Where possible, QQI Support will inform you if there are any participants attending by phone. You should inform the chair and lead team member.



	<p>These participants do have access to the hands-up or chat facility so may need to be asked directly for their input.</p> <p>10. Once the private meeting has concluded, hang up and join the meeting session with ETB representatives / stakeholders.</p>
<p>During the meeting</p>	<ol style="list-style-type: none"> <li>1. Follow the <b>General Guidelines</b> regarding video and microphone usage.</li> <li>2. If you are the team member assisting the chair/lead team member, you should monitor the chat and 'raise hand' function throughout the meeting.</li> <li>3. It may be useful to identify yourself when speaking. It is easy to forget that there are virtual participants who are not able to see (or identify) the speaker.</li> <li>4. Speak slowly and clearly – participants do not have access to body language and other non-verbal cues. Be explicit about thoughts and opinions and ensure that your questions are clearly phrased. The only way others can know a participant's stance on something is if the participant is very clear about verbalising their opinions.</li> <li>5. You should pause and allow sufficient time for stakeholders to answer any questions posed and invite other participants to contribute. Particularly if you are leading a session, you should be mindful to ensure that all participants are given the opportunity to share their views, including those who do not have their cameras on, or those who have joined the meeting by phone. (QQI will inform you at the earliest possible time if any participants have had to join a session by phone due to connectivity issues.) This may be checked several times throughout the meeting.</li> <li>6. Avoid speaking while others are talking unless an interruption is necessary to clarify/correct a participant's understanding of a question or to curtail lengthy or circuitous responses. Ask for clarification on any point or issue that is not clear.</li> </ol>
<p>After the meeting</p>	<ol style="list-style-type: none"> <li>1. Once a meeting session has ended, hang up and join the private review team meeting space.</li> <li>2. A private review team meeting will be scheduled after each session or block of sessions.</li> <li>3. Ensure that you and the other team members are in agreement on the main points of evidence gathered in the meeting. If you are not in agreement on a particular point, it is important to voice this.</li> <li>4. Any outstanding questions, or areas that require further clarity should be identified and agreed by team members. Consider which stakeholder</li> </ol>



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groups will be able to provide clarity on the point in question and plan to include questions on the topic in the relevant session.

5. The schedule will have 'open slots' where the Review Team can meet with particular groups again / meet with new groups. Your contact in QQI can arrange these as necessary.



### 3. Guidelines for review team chair

The chair’s role will not ostensibly alter from the overview provided in the Review Handbook. However, virtual meetings create different situations that require a modified approach.

<p>Prior to the meeting</p>	<ol style="list-style-type: none"> <li>1. As chair, you, along with the coordinating reviewer, should ensure that all relevant documentation required for the meeting is available to the review team in advance. QQI will support you in this.</li> <li>2. In advance of the session, team members’ details will have been shared with the session participants. Therefore, introductions can be very brief. This is also necessary given the strict time frame of each session.</li> <li>3. You should confirm which team member will lead questioning during the meeting session, who will act as support, and who will act as chief note taker. You, as chair, should nonetheless open and close each meeting session.  Before each meeting, you should confirm with review team members the agreed focus of the meeting. This will include topics for discussion and indicative questions, which should be proposed by the lead team member in advance of the visit.</li> <li>4. For meeting sessions involving the full review team (i.e. not meeting sessions running in parallel), a quorum of four review team members is necessary to proceed with any meeting session. This must include both the chair and coordinating reviewer. All review team members are expected to participate fully in meeting sessions throughout the main review visit - even if a reviewer is not leading a particular session, they should nonetheless be present.  In the event that review team members are unable to connect/ dial in to the meeting, you must ensure that the quorum has been met before starting the meeting session.</li> <li>5. In the case of certain meetings (such as sessions with learners), you may wish to brief all participants as a group before they are split into separate groups</li> </ol>
<p>During the meeting</p>	<ol style="list-style-type: none"> <li>1. You should welcome the ETB representatives and stakeholders and endeavour to put them at their ease.</li> <li>2. You should highlight the focus of the meeting session.</li> <li>3. It is recommended that introductions are not included to save time. Participant details are included in the review schedule.</li> <li>4. You should remind the review team and stakeholders to flag any technical issues to QQI Support through the meeting chat facility.</li> </ol>



	<p>5. Participants who wish to contribute/add further comments can request to do so through the TEAMS 'raise hand' function. Select  show participants to see a list of everyone in attendance. Anyone who has raised their hand will have an icon next to their name. When multiple people raise their hands, they will be listed in the order in which they raised them.</p> <p>Along with the co-ordinating reviewer, you should alternate between the chat sidebar and 'Show Participants', and, where necessary, act upon any messages from meeting participants at the appropriate time.</p> <p>To assist in this, for each session, you should assign one review team member the task of alerting the chair to any questions/raised hands appearing.</p> <p>You should be mindful to ensure that all participants are given the opportunity to share their views, including those who do not have their cameras on, or those who have joined the meeting by phone. (QQI will inform you at the earliest possible time if any participants have had to join a session by phone due to connectivity issues). This may be checked several times throughout the meeting.</p> <p>6. Time for participants to make any additional comments should be built in at the end of each session, which you, as chair, should highlight and coordinate.</p> <p>7. You should clearly bring the meeting to a close and indicate that all participants may leave the meeting. Where a session is followed by a private review team meeting, you should instruct team members to join the subsequent private meeting session.</p> <p>8. You should remind participants that, if they experience connectivity issues, they may to make a short written submission up to one hour after the session's conclusion, detailing any additional, new information that they did not have the opportunity to provide during the session. These submissions may be made via the MS Form established for this purpose. A link to the form may be requested via the MS Teams chat or from the ETB review coordinator.</p>
<p>After the meeting</p>	<ol style="list-style-type: none"> <li>1. Confirm that all team members have joined the separate private review team meeting.</li> <li>2. You should ensure that all review team members are in agreement on the main points of evidence established during the meeting.</li> <li>3. Any outstanding questions, or areas that will need to be clarified further in subsequent meetings, should be identified and noted by the coordinating reviewer.</li> </ol>



## 4. Guidelines for coordinating reviewer

The coordinating reviewer’s role will not ostensibly alter from the overview provided in the Review Handbook. However, virtual meetings require more administrative preparation which the coordinating reviewer will oversee.

The coordinating reviewer is the point of contact between the review team and QQI and is responsible for communicating any issues experienced by review team members to QQI, and for conveying any instructions or messages from QQI to the review team.

<p>Prior to the meeting</p>	<ol style="list-style-type: none"> <li>1. As coordinating reviewer, you, along with the chair, should ensure that all relevant documentation required for the meeting is available to the review team in advance. QQI will support you in this.</li> <li>2. QQI will share review team members’ contact details with the coordinating reviewer and the review team. It may be helpful to establish a method of communicating (non-sensitive) information quickly and simultaneously with team members – for example, a WhatsApp group. If all team members agree, the coordinating reviewer should establish the group.</li> <li>3. Ensure you have been provided with the meeting record template for main review visit sessions, as well as the review report template. Your QQI contact person will assist you in this regard.</li> <li>4. With the other team members, you should ensure that a copy of the meeting record template that corresponds with each meeting session is saved in the review team working folder.</li> <li>5. You should ensure that the chair has confirmed with fellow team members who will lead questioning during the meeting session, and who will act as support.</li> <li>6. Before each meeting, you should ensure that the chair has confirmed with review team members the agreed focus of the meeting. This will include topics for discussion and indicative questions.</li> <li>7. Should any participant be missing from a meeting session, QQI will contact you directly to inform you of same. You should inform the chair and review team members of any participant absences.</li> </ol>
<p>During the meeting</p>	<ol style="list-style-type: none"> <li>1. Along with the agreed note-taker for each meeting, the coordinating reviewer is responsible for keeping an accurate record of discussions at the meeting and ensuring that the conclusions reached and main points of evidence established by the panel are accurately noted in order to coordinate the panel in drafting the review report.</li> <li>2. If you require clarification on particular points made by fellow panel members or provider representatives, interject during the meeting as necessary.</li> </ol>



	<p>3. Ensure that the chair has reminded participants that, if they experience connectivity issues, they are free to make a short, written submission up to one hour after the session’s conclusion, detailing any additional, new information that they did not have the opportunity to provide during the session. These submissions may be made via the MS Form established for this purpose. A link to the form may be requested via the MS Teams chat or from the ETB review coordinator.</p>
After the meeting	<p>1. Along with the chair, ensure that all panel members are in agreement on the conclusions reached and main points of evidence established during the meeting and further ensure that you have noted these points for inclusion in the draft review report.</p> <p>2. Stakeholders and ETB representatives who experience connectivity issues during a meeting session may make a short, written submission to the review team within one hour of the meeting’s conclusion. This is done through the MS Form established for this purpose. QQI Support will monitor the form throughout the day for any submissions and share these with you for immediate circulation to other review team members.</p> <p>During private meeting slots, ensure that you and the chair summarise the main points raised, and conclusions reached at the end of the various sessions held with the provider. You should note any outstanding questions, or areas that will need to be clarified further in subsequent sessions with the ETB representatives or stakeholders.</p>



## 5. Guidelines for stakeholders

<p>Prior to the meeting</p>	<ol style="list-style-type: none"> <li>1. Follow the <b>General Guidelines</b> prior to the meeting.</li> <li>2. If you have internet connectivity issues, you should contact the ETB review coordinator by phone/text using the contact number provided. If the connectivity issues cannot be resolved, you may need to dial into the meeting session using the phone number and conference ID provided in the meeting invitation.</li> </ol>
<p>During the meeting</p>	<ol style="list-style-type: none"> <li>1. Follow the <b>General Guidelines</b> regarding video and microphone usage and the 'raise hand' function.</li> <li>2. Indicate any technical issues experienced through the meeting's chat facility.</li> <li>3. The chair will open the meeting by welcoming all attendees and introducing the topic for discussion.</li> <li>4. The chair/lead speaker will invite you to contribute to the meeting by addressing specific questions raised on the topic.</li> <li>5. In general, it is useful to identify yourself when speaking. It is easy to forget that there are participants who are not able to see (or identify) the speaker.</li> <li>6. Speak clearly – virtual attendees do not have access to body language and other non-verbal cues, you should speak slowly and clearly. Be explicit about thoughts and opinions on the questions asked.</li> <li>7. Please do not speak while others are talking and avoid interrupting speakers. Ask for clarification on any point or issue that is not clear. An opportunity of time for additional comments will be built in at the end of each session. This will be controlled by the chair.</li> </ol>
<p>After the meeting</p>	<ol style="list-style-type: none"> <li>1. Follow the <b>General Guidelines</b> for after the meeting.</li> <li>2. Please be aware that should you fail to remove yourself at the end of a meeting, QQI support may need to do so on your behalf.</li> <li>3. In the event that you experience connectivity issues, there will be an opportunity to submit additional comments to the review team via an MS Form established for this purpose. A link to this form may be requested via the MS Teams chat or from the ETB review coordinator.</li> <li>4. Submissions may be made up to one hour after the session's conclusion.</li> <li>5. If you are no longer required to access the chat facility, QQI Support will remove access on your behalf.</li> </ol>



## 6. Guidelines for ETB review coordinator

The ETB review coordinator remains the main point of contact between the ETB/stakeholders and the review team/ QQI. However, virtual meetings create different situations that require a modified approach.

An optional meeting with the ETB review coordinator will be retained in the timetable at the beginning of each day of the virtual review process. This provides the team with the opportunity to request additional documentation and (in exceptional circumstances) to request amendment to the main review visit timetable.

QQI will organise meeting sessions and will attend any meeting sessions arranged by the ETB to support the review team.

<p>Prior to the meeting</p>	<ol style="list-style-type: none"> <li>1. Ensure that any documentation required by the review team has been provided to the review team in advance of the meeting. This will generally be via the SharePoint folder established by QQI for this purpose.</li> <li>2. Ensure that invitations have been forwarded to all relevant stakeholders in advance of the meeting and notify the review team chair and QQI of all attendees and (if applicable) apologies in advance of the meeting. Refer to instructions on sharing meeting invitations (QQI will provide instructions by email in advance of the main review visit).</li> <li>3. Provide your contact details to stakeholders to allow them to notify you if they have any internet connectivity issues in advance of joining the meeting. If a stakeholder informs you that they will be dialling into the meeting by phone, you should inform QQI immediately.</li> <li>4. Ensure that all relevant documentation has been received by ETB representatives and external stakeholders in advance of their meeting sessions.</li> </ol>
<p>During the meeting</p>	<p>The ETB review coordinator or other representatives from the ETB, with the exception of agreed representation for specific meetings, will not be in attendance for the meetings.</p>
<p>After the meeting</p>	<ol style="list-style-type: none"> <li>1. Follow up with the review team chair and QQI on any additional documentation required and ensure that this is uploaded to the agreed folder in good time.</li> <li>2. If you are approached by a stakeholder who has experienced connectivity issues during a meeting session, you should instruct them that they may make a short, written submission within one hour of the session's conclusion, detailing any additional, new information that they did not have the opportunity to provide during the session, and direct them to the MS Form established for this purpose (QQI Support will provide you with a link).</li> </ol>



## Appendix: Contingency plan

A. Contingency plan for review team	
Issue	Proposed Action
1. Review team member(s) (ANY) unable to connect to meeting session	<ul style="list-style-type: none"> <li>- Review team members should contact QQI Support/coordinating reviewer by phone/text as soon as an issue becomes apparent.</li> <li>- QQI Support will re-issue the session invitation to the review team member.</li> <li>- If the issue persists, QQI Support will communicate this to the ETB.</li> <li>- The coordinating reviewer will communicate the issue to the chair and remaining team.</li> <li>- The review team member experiencing the problem should dial into the meeting. A conference pin will be required. This is included in the main review visit timetable, as well as in the calendar invitation for the meeting.</li> <li>- The chair indicates to all attendees that a review team member is joining the meeting by phone.</li> </ul>
2. Review team member (ANY) unable to connect or dial in to meeting session	<ul style="list-style-type: none"> <li>- The review team member affected should contact QQI Support/coordinating reviewer by phone/text.</li> <li>- The coordinating reviewer will communicate the issue to the chair and remaining team members.</li> <li>- Where the review team member is not the chair/lead for a session, they may communicate by email to their team colleagues any questions relevant to the session.</li> </ul>
3. Chair unable to connect or dial in to meeting session	<ul style="list-style-type: none"> <li>- As per Section C (below – ‘Contingency plan for all participants’)</li> </ul>
4. Coordinating reviewer unable to connect or dial in to meeting session	<ul style="list-style-type: none"> <li>- As per Section C (below – ‘Contingency plan for all participants’)</li> </ul>
5. Lead review team member unable to connect or dial in to meeting session	<ul style="list-style-type: none"> <li>- The second lead review team member assumes responsibility for leading questioning during the meeting session. It is important that team members leading sessions are familiar with their partner’s questions.</li> </ul>



## B. Contingency plan for ETB representatives/stakeholders

Issue	Proposed Action
1. ETB representative/ stakeholder (ANY) unable to connect to meeting	<ul style="list-style-type: none"> <li>- The ETB representative/stakeholder contacts the ETB review coordinator by phone/text as soon as the issue becomes apparent.</li> <li>- The ETB review coordinator re-issues the meeting invitation to ETB representative/stakeholder.</li> <li>- If the issue persists, the ETB review coordinator will communicate this to QQI Support and instruct the ETB representative to dial into the meeting, reminding the ETB representative/stakeholder that a conference pin, available in the main review visit timetable, as well as in the calendar invitation for the meeting, will be required.</li> </ul>
2. ETB representative/ stakeholder (ANY) unable to connect to or dial into meeting	<ul style="list-style-type: none"> <li>- The affected ETB representative/stakeholder should contact the ETB review coordinator by phone/email.</li> <li>- The ETB review coordinator will notify QQI Support of the issue.</li> <li>- The ETB representative/stakeholder affected may make a short written submission to the review team via a Microsoft Form that will be established for the purpose. A link to the form may be requested via the MS Teams chat (if possible) or from the ETB review coordinator. Submissions may be made for up to one hour after the meeting session has concluded.</li> </ul>
3. Key ETB personnel unable to connect to or dial into meeting	<ul style="list-style-type: none"> <li>- As per Section C (Contingency plan for all participants)</li> </ul>



### C. Contingency plan for all participants

Issue	Proposed Action
<p>1. Microsoft Teams outage or similar prevents all participants from joining/remaining in meeting session</p>	<ul style="list-style-type: none"> <li>- QQI Support will create a new MS Teams meeting session for the same time as the original session and circulate its link to review team members and the ETB review coordinator.</li> <li>- QQI Support will contact the coordinating reviewer by phone/text to confirm receipt of link by review team members. The coordinating reviewer will request confirmation of receipt by review team members.</li> <li>- QQI Support will contact the ETB review coordinator by phone/text to confirm receipt of the link.</li> <li>- The ETB review coordinator will circulate the new MS Teams meeting link to all ETB representatives/stakeholders.</li> </ul>
<p>2. Microsoft Teams outage or similar prevents all participants from joining/remaining in meeting session. New meeting links do not function.</p>	<ul style="list-style-type: none"> <li>- After consulting with the review team members and ETB review coordinator, QQI Support will reschedule a meeting session via MS Teams at the earliest possible time.</li> </ul>