Institutional Effectiveness Partnership Initiative
Typical Process for Partnership Resource Team (PRT) Visits
(Revised July 8, 2015)

General Notes
- The Project Director and IEPI Program Specialist often work with the College CEO, point person, and PRT members on scheduling each visit, and on scheduling the meetings that occur during the visit. However, most PRT Leads have preferred to work directly with the point person on scheduling those meetings, and may certainly do so if they wish.
- The main responsibilities of the PRT Lead include communicating as needed with the College CEO.
- The PRT Lead will have at least one substantial phone conversation or meeting with the College CEO before each visit, in part to ensure mutual understanding of the purposes of and expectations for the visit.
- After each visit, both PRT members and the College will be asked to evaluate the visit.

Preparation for Visit 1
- In their initial conversation, the College CEO and the PRT Lead discuss the importance of informing the college community, and especially the participants in visit meetings, about the nature and purposes of the PRT visit, and about the information that participants will be asked to provide in those meetings.
- The PRT reviews the following documentation:
    - IEPI and accreditation status documentation
    - Any additional documentation provided by the College that they regard as crucial to understanding the areas of focus
    - Other documentation available on the College website, or provided by the College at the team's request, that is directly related to the areas of focus
- The PRT reviews the list of individuals and groups the College has suggested for interviews/meetings; identifies any additional interviews or meetings that are needed to gain a fuller understanding of the College's needs, and decides who on the PRT should meet with whom. Some interviews/meetings might work best with one PRT member; others might require two or more members, or even the whole team.
- The initial visit day will typically start at 8:00 or 8:30, and include short breaks between meetings (to the extent that any formal committee meetings have such flexibility), a 45-to-60-minute lunch break, an afternoon wrap-up meeting for the team, and, in case the CEO requests an oral summary of initial observations, time for that meeting as well, all by the target finish time of 4:30 or 5:00. The PRT Lead or Project Director work with the College point person to finalize the schedule for the day.

Visit 1: Gathering Information and Establishing Scope
- The PRT holds interviews and meetings with the individuals and groups applicable to the areas of focus, and asks questions the team has identified as applicable to each interview or meeting, with follow-up questions as appropriate.
- The PRT documents and analyzes the information gathered in the interviews and meetings.
- The PRT meets as a team to share preliminary observations about the College's areas of focus, what the College has already done or plans to do about them, and what additional IEPI resources, if any, would help the College make progress.
- Based on the team's discussion, the PRT prepares and presents a brief oral summary of initial observations, if the CEO has requested one.

Follow-Up to Visit 1
- If the CEO has requested a written Summary of Initial Observations based on the team's discussion, the PRT drafts it (using the template provided if desired) as soon as possible—ideally within two weeks of the visit.
- The Project Director or PRT Lead forwards the final version of the Summary to the CEO, and the request for any additional documentation to the College point person.

Preparation for Visit 2
- Based on the documentation review, interviews, meetings, and further discussions, the PRT creates a preliminary List of Primary Successes and Menu of Options for College consideration in developing its Innovation and Effectiveness Plan.
- At least a week before the second visit, the PRT Lead sends the preliminary List of Primary Successes and Menu of Options to the CEO for feedback, and refines as appropriate based on the feedback.
- The CEO designates a group to develop a draft of the Innovation and Effectiveness Plan (the I&EP group).

Visit 2: Helping the College Develop Its Innovation and Effectiveness Plan
- The PRT meets with the CEO (and others that he or she might wish to include) to gather information on any progress that has occurred since the first visit.
- The PRT meets with the I&EP group, shares the List of Primary Successes and Menu of Options, introduces the Innovation and Effectiveness Plan template as a useful model for structuring the Plan, and assists the I&EP group as they draft the Innovation and Effectiveness Plan, providing constructive advice, commentary, and feedback as needed.
  - o The components of the Plan should at some point be integrated into the College's existing planning processes and products, but the College will find the template a handy repository for objectives, associated planning elements, and, if the College wishes to request a seed-money grant to expedite implementation of the Plan, the Request for IEPI Resources, which is required to obtain that grant.
  - o If the I&EP group does not finish the draft Plan at the meeting (which is likely), the PRT Lead makes arrangements for its chair to email a copy of the finished draft in Word as soon as it is available, so that the team can provide feedback.

Follow-Up to Visit 2
- The PRT provides constructive and timely written feedback on the draft of the Innovation and Effectiveness Plan as soon as it becomes available. The Project Director or PRT Lead forwards the final version of the feedback to the CEO and the I&EP group chair.
- The Project Director asks the I&EP group chair to email a copy of the final Plan to him as soon as it is available; the Project Director will distribute it to the PRT.

Preparation for Visit 3 and Any Subsequent Visits
- The Project Director asks the College point person to provide a status report on implementation of the Innovation and Effectiveness Plan at least two weeks before the visit, and distributes it to the PRT.
- The PRT reads the final version of the College's Innovation and Effectiveness Plan, along with the latest status report, and assesses overall progress on the Plan.
- The PRT identifies areas for praise and areas for concern, and prepares a set of positive comments and questions accordingly for the CEO and the I&EP group during the visit.

Visit 3 and Any Subsequent Visits: Following Up
- The PRT meets with the CEO (and others that he or she might wish to include) to get her or his perspective on progress to date, and shares any positive comments or questions from the list that the initial discussion has not already covered.
- The PRT meets with the I&EP group to get their perspective on progress to date; shares any positive comments or questions from the list that the initial discussion has not already covered; provides constructive advice, commentary, and feedback, including ideas or suggestions to improve implementation of the Plan, as needed; and discusses whether an additional visit would be helpful to the College.
- Upon request, the PRT meets once more with the CEO to answer any questions and provide an oral summary of ideas or suggestions to improve implementation of the Plan.

Wrap-Up and Evaluation
- If the CEO has requested a written Summary of Observations, the PRT drafts it based on the team's final discussions, and the Project Director or PRT Lead forwards the final version of the Summary to the CEO.

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