

STEP-BY-STEP PBI™ VISIT DOCUMENTS

Note: This is a comprehensive list of documents that are used during the actual conduct of a visit. The selection and contents of these documents are tailored to each protocol. *Request.*

Principles of project or agency related to the purpose of the visit

Why conduct PBI visits

Introduction to PBI focus areas

Focusing on learning

Focusing on teaching for learning

Focusing on school support for learning and teaching

The importance of the written report

The report outline

Contingencies when writing about leadership

How to use the report outline

PBI Visit Report Template

Questioning members of the school community

Talking with students

Focusing on student work

Focusing on the school improvement plan

Questions for team room debriefings

Action, perceptions, perspective and judgment

How to help the team use its professional judgment in writing visit conclusions

How to lead the team in writing conclusions

Conclusions, recommendations and commendations

Tests for conclusions

Tests for the report

How to lead the team in testing conclusions and the report

Schedule for PBI visit

Elements behind the schedule

How to use the visit schedule

Notes for how to start meetings during the school visit

Form for Monday's schedule

Information meeting with staff and faculty of the school

Basic information about school

Initial phone call with principal

What information schools provide for the Profile

Initial meeting with school leadership

Teacher form for student work sample

Chair's steps for leadership meeting re: PBI visit at _____ school

Reading the report

Letter to principal for factual review

Preparing for post-visit support session

Sample action plan

Worksheet for developing action plans

Reflection sheet for PBI visit

Chair responsibilities for team training

Agenda for team training

How to conduct single team training session

Chair preparations for a PBI visit

Essential Items for visit checklist

Letter to team members

Template for schedule for school events

Roster of the team members of the PBI visit to ____ school

Information to e-mail to Catalpa before the visit

The ideal team room

How to set up the computer, use the report template and customize the school report

Codes for sources of evidence

Short cut keys for PBI report template

Working with members of the school community

Expectations for how the host school manages a PBI school visit

Policy on food and gifts for PBI visit teams

How the host schools can best manage the PBI school visit

How a host school can respond to its PBI visit report

Steps for report preparation after the visit

Versions of report from the perspective of the chair

Certification of the composition of PBI visit teams

Protocol for observers of the PBI visit

Code of conduct

Conflicts of interest for a team member in a host school

Protocol for Catalpa Ltd. endorsement of PBI school visit reports