

Site Visit Report Elements

This document provides a framework for your site visit. Create a protocol to fit your needs. When you have identified the type of information you are seeking, send it to the schools you are visiting. They will appreciate it and be more prepared to give you what you need while you are there. The more effort you put into planning the visit in your search for possible solutions, the more productive your visit will be in reaching your team's goals. (A more detailed version of this site visit report can be found at www.principals.org)

NOTE: YOUR OBSERVATIONS AND CONCLUSIONS MUST BE SUPPORTED WITH DATA

1. School Visited:
 - School demographics

2. Program Description:
 - Program owner
 - How long in place
 - Key elements
 - Students impacted (all, by grade, etc.)
 - Staff impacted/involved
 - How success is measured and program success to date (in the student outcomes categories—and other measures employed by the school)
 - What accounts for program success, e.g., specific resources, program design, collaboration, student focus, feedback mechanisms, professional development, community involvement, etc.

3. Program Issues:
 - Implementation hurdles
 - Ongoing problems
 - Costs
 - Compromises and adjustments required

4. Program Impact:
 - Student Impact Chart

5. Fit for Our School:
 - Program elements that have promise and those that don't (and why)
 - Potential implementation hurdles

CSSR Site Visit: GUIDING ISSUES

STUDENT-DRIVEN STRATEGIES: Areas to investigate...

1. Students have a meaningful voice in determining the learning process in which they are engaged.
2. Classroom practices specifically address development of stronger student expression of their voice in a deep and meaningful way.
3. Students have meaningful choice in the nature and scope of learning and assessment activities.
4. Students can exercise choice in learning in the community
5. Students are proactively engaged in their learning.
6. Policies, processes, practices and structures are in place that adequately support meaningful student voice & choice.
7. Student created lessons or units are being developed.
8. Student created lessons or units are being implemented.
9. Specific actions to engage students more fully have been implemented since the NETWORK Summer institute.
10. Students have meaningful roles in school governance.
11. Students are well-known enough (connected to one or more adults) to be engaged, motivated, and educated at a high level.
12. Students have stayed engaged with students from other NETWORK schools they met at the Summer Institute.
13. The CSSR coach is being used effectively in enhancing student voice, choice, and engagement.

AUTHENTIC ASSESSMENT: Areas to investigate...

1. Rubrics have been developed.
2. Rubrics have been employed in the classroom to assess student work
3. Student papers and exhibitions are scored appropriately
4. Where rubrics are being employed, appropriate methods of obtaining inter-rater reliability have been utilized.
5. Inquiry-based lessons and units have been implemented.
6. There is a clear and appropriate emphasis on depth versus breadth.
7. Inquiry-based learning assignments reinforce the acquisition of 21st century skills.
8. Assignments provide students with a wide choice of performance-based assessment tasks
9. Meaningful conversations among faculty members are being held regarding authentic assessment in an inquiry-based environment

10. The authentic assessment plan developed at the Summer Institute has been or is being implemented
11. Faculty have stayed engaged with faculty from other NETWORK schools they met at the Summer Institute
12. The CSSR coach is being used effectively in supporting faculty in the application of authentic assessment best practices

CULTURE CHANGE: Areas to investigate...

1. All key stakeholders are engaged in the culture change process.
2. Espoused and values in practice are in synch and support the change to personalized learning, i.e., authentic assessment.
3. Leadership is spending the time necessary to support the implementation of authentic assessment.
4. Leadership is employing effective communication and buy-in activities to gain acceptance and support for the authentic assessment effort.
5. The principal is staying appropriately engaged in the overall authentic assessment implementation process.
6. A change leadership team is in place and possesses a clear purpose and charter with regard to supporting the authentic assessment effort.
7. Leadership has put policies, processes, and practices in place that adequately support the implementation of authentic assessment.
8. Leadership has insured that the authentic assessment effort is adequately resourced.
9. Leadership is effective in setting priorities and integrating the major initiatives the school is engaged in.
10. The value of role clarity (for both individuals and teams) is understood and continually addressed with regard to all key positions and roles
11. Leadership is distributed and collaborative.
12. Leaders have stayed engaged with leaders from other NETWORK schools they met at the Summer Institute
13. The CSSR coach is being used effectively in supporting leadership in the culture change process, i.e., creating a positive climate for auth. assessment acceptance.

A. Overview

The goal of a CSSR site visit is to provide information that will help you meet project goals with regard to student personalization, authentic assessment, and change leadership. It is designed to help schools and stakeholders better understand what is possible by experiencing learning opportunities in other environments. The following exercises are designed to assist in identifying what type assistance will be of most value, and in keeping with that, identifying the focus you would like members of your team to embrace during a site visit.

B. Goals & Questions

NETWORK assistance is only of value if it addresses issues of importance to you. Below, list your to school goals and key questions you need answers to.

1. Goals:

-
-
-

2. Key Questions (for example: How do we ... ? or, What is the best way to ...?):

-
-
-

C. School Alignment

A key culture change process addresses school alignment on 11 key elements, that when in synch lead to high performance. The elements are in sequence and build upon one another. The following inventory will give you an idea how well key aspects of school functioning are aligned, and the degree to which your leadership is on the same page with regard to the 11 elements. A score of less than 5 on an item indicates a potential area of opportunity for improvement

performance with regard to the NETWORK project, as well as other initiatives. The elements are described below, and certain aspects relevant to this project have are presented for evaluation. Assess your alignment status by circling the appropriate number.

1. EXTERNAL FORCES: *Current and future stakeholder needs, and characteristics of the economic, political, legal, regulatory, and competitive environment are recognized and understood.*
 - a. Stakeholder, particularly student, needs are clearly defined: No 1 2 3 4 5 Yes
 - b. Stakeholders are appropriately engaged in essential aspects of the NETWORK project: No 1 2 3 4 5 Yes
 - c. Leadership is on the same page with regard to stakeholder engagement requirements: No 1 2 3 4 5 Yes
2. VALUES: *The school's values and beliefs (to include cultural norms) are clearly aligned with stakeholder needs.*
 - a. Values are clearly articulated and support NETWORK goals: No 1 2 3 4 5 Yes
 - b. Current stakeholders were key contributors in defining school values: No 1 2 3 4 5 Yes
 - c. Key stakeholder groups are on the same page with regard to school values: No 1 2 3 4 5 Yes
3. CORE COMPETENCE: *The school's core competence (what the school does well) is well-defined and understood with regard to key stakeholder needs, school values, and within the context of important external variables such as laws/regulations, politics, and the economy*
 - a. School strengths have been identified and leveraged to support the NETWORK project: No 1 2 3 4 5 Yes
 - b. Your school has the competence necessary to meet NETWORK goals: No 1 2 3 4 5 Yes
 - c. Leadership is on the same page with regard to school strengths and limitations as they apply to meeting NETWORK goals:
No 1 2 3 4 5 Yes
4. VISION, MISSION, GOALS & PLANS: *The school's vision, mission, short and long-term goals, plans, and strategies are aligned with stakeholder needs, school values, and core competence.*
 - a. The school's vision and mission clearly support NETWORK goals and strategies: No 1 2 3 4 5 Yes
 - b. Major goals are clearly defined, and their interdependencies articulated and well understood: No 1 2 3 4 5 Yes
 - c. Leadership is on the same page with regard to the alignment of the NETWORK project with the school vision, mission, goals, and plans: No 1 2 3 4 5 Yes
5. PROCESSES: *Core and administrative processes are well-defined, documented, in close alignment with the school's vision, mission, values, and strategic plans, and are assigned to someone for ownership, i.e., quality control, measurement, and improvement.*
 - a. Stakeholders are clear on what processes (e.g., instructional/AA and leadership) underpin the NETWORK project:

No 1 2 3 4 5 Yes

b. The NETWORK project and supporting processes have clear owners: No 1 2 3 4 5 Yes

c. Leadership is on the same page with regard to how well NETWORK related processes are functioning:

No 1 2 3 4 5 Yes

6. POLICIES & PROCEDURES: *Policies and procedures are in place to insure appropriate process execution.*

a. An audit of policies has been done to identify where policy changes are required to support the NETWORK project:

No 1 2 3 4 5 Yes

b. Policies and procedures clearly support the implementation of the NETWORK project: No 1 2 3 4 5 Yes

c. Leadership is on the same page with regard to what policies are required to support the project: No 1 2 3 4 5 Yes

7. ORGANIZATION STRUCTURE: *Governance/Authority and Communication channels are designed to maximize effective process, policy, and procedure execution.*

a. Structures are in place that support the accomplishment of NETWORK activities: No 1 2 3 4 5 Yes

b. Communication channels insure that key stakeholders always have the information they need to insure successful project implementation: No 1 2 3 4 5 Yes

c. Leadership is on the same page with regard to what structures are required for project success: No 1 2 3 4 5 Yes

8. JOB/ROLE DESIGN: *Jobs/Roles are designed to support effective procedure, policy, and process execution.*

a. The roles of key stakeholders are clearly defined to insure that NETWORK activities are executed as required:

No 1 2 3 4 5 Yes

b. Authentic Assessment Team, Change Leadership Team, and Site Coordinator roles are clearly defined:

No 1 2 3 4 5 Yes

c. Leadership is on the same page with regard to what roles are required for project success: No 1 2 3 4 5 Yes

9. KNOWLEDGE, SKILLS, & TALENTS: *Job/Role-specific knowledge, skills, and talents are assigned to each position to insure all tasks, duties, responsibilities, and other role requirements support effective process, policy, and procedure execution.*

a. NETWORK project stakeholders have the knowledge and skills required to ensure project success: No 1 2 3 4 5 Yes

b. Sufficient professional development activities are in place to insure skill capacity building is sufficient to insure stakeholders have the ability to successfully execute project activities: No 1 2 3 4 5 Yes

c. Leadership is on the same page with regard to stakeholder professional development requirements: No 1 2 3 4 5 Yes

10. EVALUATION: *Job incumbents are evaluated in a regular and fair fashion re: job performance requirements.*

a. An evaluation process is in place to identify NETWORK project knowledge and skill requirements: No 1 2 3 4 5 Yes

b. The evaluation process has a clear owner who has the skills required to be effective in the role: No 1 2 3 4 5 Yes

- c. Leadership is on the same page with regard to the adequacy of the project evaluation process: No 1 2 3 4 5 Yes
- 11. **STAFFING PLANS:** *Tactical and strategic staffing plans are in place and executed effectively. Plans include hiring, job-alignment moves, training/development requirements, and termination requirements.*
 - a. A clear plan for NETWORK project staffing is in place – across the life of the project: No 1 2 3 4 5 Yes
 - b. The NETWORK staffing plan is designed to insure that role/job fit is adequate to drive project success:
No 1 2 3 4 5 Yes
 - c. Leadership is on the same page with regard to the adequacy of project staffing plans: No 1 2 3 4 5 Yes

Implications

- What is the linkage between the goals and questions you identified in Section B and your responses to the items related to the 11 school alignment elements above?

- What are the implications for the success of your NETWORK project?

- How do your thoughts above translate into requests for assistance from the PAR Board, i.e., what areas would you like the PAR Board to focus on during its visit?
 -
 -
 -

Resources

When your culture change needs are clarified, keep in mind that CSSR coaches are available to help with capacity building as reflected in the nine culture change Success Factors provided on the following page. CSSR has tools, protocols, and other materials in each of the nine areas that can be brought to bear to address your leadership needs – your goals and the questions you need answered.

CHANGE LEADERSHIP ESSENTIAL SUCCESS FACTORS

<p>A. FOUNDATION BUILDING: <i>Creating clear performance expectations for all participants in the change process</i></p> <ul style="list-style-type: none"> • Creation of the Initiative/Design Team • TA Provider Screening & Selection • Relationship/Partnership Development • Contracting - Mutual Expectation Setting - Project Goals, Roles, & Management • Managing Your TA Providers Workshop • Progress & Working Relationship Assessment Process • Change Leadership Workshop (CL 101) • Skill Building
<p>B. TEAM DEVELOPMENT: <i>Creating high-performing teams – the engine of change</i></p> <ul style="list-style-type: none"> • Team Functioning Assessment • Role Descriptions • Role Assignment Process • Operating Guidelines • Sub-Team Development (data, policy, communication, best practice, etc.) • Team Audit • Team Role Description • Policies • Team Charter • Skill Building
<p>C. NEEDS ASSESSMENT: <i>Identifying what must change to meet goals – performance baselines</i></p> <ul style="list-style-type: none"> • Student Data Analysis • Stakeholder Interviews & Focus Groups • Culture Analysis • Climate Analysis • Surveys • Student Shadowing • Teacher Role Clarification • Assessment of Classroom Practices • Skill Building
<p>D. FOCUSING AND OPTIMIZING: <i>Focusing on what’s most important – making best use of resources</i></p> <ul style="list-style-type: none"> • Values Creation or Clarification • Visioning - Vision, Mission, & Educational Philosophy • Operationalizing Values and Visioning Statements • Initiative Mapping • Function Mapping • Role Accountability • Team Audit/Mapping • Policy Audit/Mapping • Meeting Mapping • Initiative Integration • Off-The-Platter Analysis • Finding Time • Goal & Objective Setting • Strategic Planning • Skill Building
<p>E. PROJECT MANAGEMENT: <i>Planning, organizing, staffing, directing, and controlling - making it happen</i></p> <ul style="list-style-type: none"> • Logic model development • Action Planning - Educational & Change Leadership Best Practices • Readiness Assessment • Continuous Improvement • Quality Assurance • Viability & Sustainability Planning & Implementation • Documentation • Meeting Protocols • Meeting Facilitation • Initiative Design, Development, & Implementation Process • Measurement Process • Skill Building
<p>F. COMMUNICATION & BUY-IN: <i>Employing specific strategies to gain acceptance and support for change initiatives</i></p> <ul style="list-style-type: none"> • Stakeholder Analysis • Resistance Analysis • Political Landscape Mapping • Influence Strategizing • Communication Planning & Implementation • Skill Building
<p>G. POSSIBILITIES IDENTIFICATION: <i>Identifying best practices that will meet goals</i></p> <ul style="list-style-type: none"> • Applied Research • Books • Articles • Experts • Site Visits • Prioritization of Possibilities/Strategies/Best Practices
<p>H. ORGANIZATION ALIGNMENT & PERFORMANCE/TALENT MANAGEMENT: <i>Utilizing management and human resource best practices to optimize staff performance in support of change initiatives and day-to-day functioning</i></p> <ul style="list-style-type: none"> • School Alignment Analysis • Process Improvement • Process/Initiative Ownership • Policy & Procedure Development • Organization Design • Job/Role Analysis & Design • Creation of Behavioral Skill & Talent Models • Recruiting • Screening/Candidate Assessment • Hiring • Promotion • Job/Role Orientation • Training • Professional Development • Career-Pathing • Succession Planning • Performance Appraisal • Staff Evaluation • Strategic Staffing Plans • Skill Building
<p>I. LEADERSHIP: <i>Building team and individual leadership capacity to drive the change process</i></p> <ul style="list-style-type: none"> • Capacity Assessment • Shared Governance - Students • Collaborative and Distributed Leadership • Community Engagement • Motivation for Culture Change • Climate • Conflict Management • Leader Assessment & Development - Decision Drivers, Planning Style, Leadership Style, Leader Skills & Talents, Power Bases • Role Focus - Managerial, Instructional, & Inspirational Leadership • Skill Building