



# California Community Colleges

## Institutional Effectiveness

### Model Process for Partnership Resource Team (PRT) Visits

(Revised October 16, 2024)

*Note: Ordinarily all PRT visits are conducted in person at the client institution's location, and a few elements of the process described below apply specifically to in-person visits (e.g., travel arrangements and reimbursements, the team dinner the evening before each visit). However, the rest of this document applies equally to in-person and virtual visits, should any prove necessary. For more information on conducting successful virtual visits, which were common during the pandemic crisis, see "Suggestions to PRTs for Conducting Visits by Zoom."*

#### General Notes

- Training is provided for all PRT members before they commence service. It includes coverage of PRT process basics, logistics, and mechanics; essential characteristics and effective practices; and an introduction to resources and tools, such as Appreciative Inquiry.
- *In all interactions with institutional personnel as well as written observations and summaries, be sure to include praise for successes, progress, quality, and innovation. Remember that the IEPI approach is positive, constructive, and solution-oriented.*
- PRT members commit to making at least three in-person visits to each client institution, as described in detail below. Exceptions to this practice are rare, because all three visits serve important purposes.
- Before every visit, make any necessary travel arrangements as soon as you can. Each PRT member is responsible for her/his own arrangements, and will be reimbursed for expenses. The client institution's logistical point person will provide recommendations on accommodations, parking, and so on well before the initial visit.
- Before, during, and after each visit, communicate with the whole PRT as needed, to share observations and to coordinate your work with the institution and each other. Zoom is an extremely useful tool for this communication. Respond promptly to requests for information or feedback from the PRT Lead or other members.
- If the PRT does not receive requested information from the institution in timely fashion, notify Peggy Lomas (IEPI Project Director).
- After each visit, both PRT members and the institution are asked to evaluate the visit using an online survey. Please make every effort to respond promptly to the evaluation requests, to help ensure the continuous improvement of the PRT process.
- Between visits, respond to zoom, phone, or email questions from the institution as they arise. If these demands on your time become excessive, please notify both the PRT Lead and Peggy.
- Keep all your original receipts, and as soon as you can after every visit, submit your travel reimbursement requests to Catherine Crossland, the IEPI Program Specialist.
- PRT Leads
  - Peggy and Catherine do the initial work with the institution's CEO and point persons, and the PRT Lead and members, on scheduling Visits 1 and 2 and on Visit 1 logistics. However, after these contacts in the early part of the process, the PRT Lead assumes primary responsibility for working with the point persons and CEO to finalize the meeting schedule and other arrangements for Visit 1 and subsequent visits. The Lead's own executive assistant very often plays a crucial role in these arrangements.
  - Other responsibilities of the PRT Lead include coordinating the timely and productive work of the team and communicating as needed with Peggy and the client CEO and point persons.
  - If multiple institutions in a district are receiving PRT services, the applicable Leads schedule at least one phone or zoom meeting before each visit to discuss among themselves how best to coordinate the work of their PRTs and then follow up as needed.

- The PRT Lead schedules at least one phone or zoom meeting with the rest of the PRT well before each visit (see Preparation for Visit 1 below), to ensure that everyone is on the same page with respect to the institution’s needs, specific team and member tasks, the steps in the PRT process, and the IEPI approach to providing assistance.
- The PRT Lead also schedules at least one substantial zoom/phone conversation or meeting with the CEO before each visit, in part to ensure mutual understanding of the purposes of and expectations for the visit. For example, it’s important to reiterate with the CEO beforehand that Visit 1 is designed to gather information and to determine the scope of PRT assistance needed; it will not include immediate conclusions or recommendations for action.
- After each visit, the PRT Lead and Peggy hold a debrief by zoom/phone, in which the Lead shares observations about the visit and the process, and may discuss the recommended timing of any visit not yet scheduled.

### ***Preparation for Visit 1***

- In initial discussions with the CEO, the PRT Lead stresses the importance of informing the institutional community in general, and the prospective participants in visit meetings in particular, about the nature and purposes of the PRT visit, and about the information that participants will be asked to share in those meetings. The PRT Lead also urges the CEO to include in the visit meetings sufficient functional and constituency representation to help the PRT understand the institution’s Areas of Focus thoroughly; the process works best when the PRT can learn from a wide array of perspectives during the initial visit. Peggy will already have covered these points with the CEO, but reinforcing them is often useful.
- Review IEPI and accreditation status documentation, including at minimum the following:
  - The institution’s Letter of Interest, which identifies the Areas of Focus (Source: IEPI)
  - The institution’s somewhat more detailed Commentary on its Areas of Focus (Source: IEPI)
  - Most recent ACCJC reports, together with any associated Peer Review Team reports (Source: College website)
  - Most recent ACCJC Comprehensive Visit Action or Reaffirmation Letter, together with any subsequent Action Letters (Source: College website)
  - Documentation of prior PRT processes, if applicable to the current Areas of Focus (Source: IEPI)
- Review the crucial documents provided by the institution that the CEO and substantive point person regard as essential to the PRT’s understanding of the Areas of Focus.
- Review other documentation available on the institution’s website that is directly related to the Areas of Focus, such as the following (as applicable):
  - Descriptions and products of the institution’s existing institutional effectiveness structures and processes, such as planning, resource allocation, institutional effectiveness, and governance committees and processes; major plans such as the Strategic and/or Educational Master Plan, with results of the latest Plan evaluation; the Program Review, Participatory Governance, or other handbooks; or minutes of particularly important recent meetings of the applicable committees
  - Applicable sections of the most recent comprehensive ACCJC Self-Evaluation Report. PRTs review portions of accreditation documents mainly because they are such a comprehensive and useful source of information, but also to help the institution address or anticipate accreditation issues related to its Areas of Focus—which is one of IEPI’s own areas of focus, in effect.
  - Applicable sections of any ACCJC Follow-Up or Special Report or Core Inquiries update submitted by the College since its last comprehensive visit
  - Applicable sections of the ACCJC Midterm Report, or more up-to-date College report, on its progress on ACCJC Recommendations, its own self-identified improvement plans, or its Quality Focus Essay

- Most recent ACCJC Annual Report and Annual Fiscal Report
- SLO Handbook and documentation of the most recent SLO cycle, from formulation through improvements and reevaluation
- Applicable policies and procedures
- Request from the point persons and then review other documentation, if any, that the team regards as important in understanding the Areas of Focus.
- Communicate with the other PRT members to discuss institutional successes, progress, and needs and to coordinate your efforts.
  - Meet by phone or zoom as a group before the visit (at least one such meeting is required, and sometimes two or more might be needed).
- Based on your review of documentation and your discussion with other PRT members, identify areas for praise (kudos) and areas for concern, and prepare a set of constructive comments and Appreciative Inquiry and clarifying questions accordingly for institutional personnel at the first visit.
  - At least one of the questions should elicit what the institution has already done, or has started doing, or plans to do, regarding each of the Areas of Focus.
  - Share your questions and comments with the other members of the team, and combine, consolidate, or coordinate as needed to expedite communication and gathering information.
  - Discuss and settle on a preferred presentation style, given the institution's culture (e.g., button-down versus casual).
- Review the list of individuals and groups and the draft schedule that the institution has suggested for interviews/meetings.
  - The PRT will typically meet separately with the CEO and with the Academic Senate President, as well as other individuals and groups that the institution has suggested.
  - Peggy will have asked the CEO to include in the meetings at least some members of the group the CEO designates to draft the *Innovation and Effectiveness Plan* (the I&EP Drafting Group) with the guidance of the PRT during the second visit. (See Preparation for Visit 2 below.)
  - Identify any additional interviews or meetings that are needed to gain a fuller understanding of the institution's needs.
  - Decide who on the PRT should meet with whom, if applicable. In most cases, the PRT stays together throughout the day and meets with everyone, but scheduling constraints might require meetings to occur in parallel, with the PRT split in halves or even thirds, and some interviews/meetings might work best with just one or two PRT members.
  - The PRT Lead forwards the list of any additional individuals or groups the team wishes to meet, who is going to meet with whom, any requests regarding the meeting schedule, and any additional documents needed to the institutional point persons (with a copy to Peggy), who work with the Lead to finalize the schedule for the day and provide the documents.
  - The initial visit day typically starts at 8:00 or 8:30, and includes short breaks between meetings, a 45-to-60-minute working PRT lunch, an afternoon wrap-up meeting for the PRT alone, and time to present an oral *Summary of Initial Visit* to the CEO (and others at the CEO's discretion). The team might then meet to finish the draft of the written *Summary of Initial Visit*; see below. The target finish time is typically 4:30 or 5:00.
  - For any virtual visit, the point persons typically make the necessary zoom arrangements and share them with Peggy and the PRT Lead.

### **Visit 1: Gathering Information and Establishing Scope**

- Meet as a team over dinner the evening before the visit, if at all possible, to build and sustain team camaraderie, discuss any remaining observations, clarify arrangements and tasks as needed, formulate any additional questions, and reflect once more on the positive, colleagues-helping-

colleagues PRT approach. If the visit is to be virtual, hold an equivalent zoom meeting a day or two beforehand.

- During the visit, hold interviews and meetings with individuals and groups as scheduled. Begin with the kudos and Appreciative Inquiry questions the team has previously identified for each interview or meeting, with follow-up questions as appropriate. Then listen carefully.
- Document (with discretion) and analyze the information you have gathered in the interviews and meetings. Taking good notes and sharing them within the PRT is essential to the next steps in the process.
- Meet as a team to share your preliminary observations about the institution's Areas of Focus, and what the institution has already done or plans to do about them.
- Based on the team's discussion, prepare and present to the CEO a brief oral *Summary of Initial Visit* (see next section for a description of the nature of the *Summary*).
- If the time between Visit 1 and Visit 2 is less than five weeks, it is helpful for the PRT to hammer out a full draft of the written *Summary of Initial Visit* immediately after the meeting with the CEO, while the team is still together. An hour is often sufficient for that purpose. Taking this step ensures that the team will have plenty of time to work on the *List of Primary Successes and Menu of Options* before the delivery deadline (see below).
- Schedule the next team zoom/phone conference and discuss other next steps with the team before you leave for the day.

### **Follow-Up to Visit 1**

- After returning to their home institutions after Visit 1, all PRT members should plan on spending some time on collectively preparing the draft *Summary of Initial Visit* (SIV), unless they have already done so (see above), and then the draft *List of Primary Successes and Menu of Options* (called the MOO; see Preparation for Visit 2 below). The Lead will schedule at least one team zoom/phone conference to discuss these documents and prepare for the next visit.
- Draft the written SIV based on the visit, using the current template provided, and send it to Peggy for review. *This part of the process should be completed within a few days of the visit if at all possible.* This document summarizes only what the PRT heard during the visit from institutional personnel.
  - The Areas of Focus entries should include those in the institution's Letter of Interest and/or Commentary on its Areas of Focus. Use the same or similar wording to ensure that the connections with the Letter/Commentary are clear.
  - The Institutional Activities Underway column entries should reflect positive steps already taken or in progress, or at least neutral observations about where such activities now stand.
  - The Ideas Expressed by the Institution column, in contrast, should focus more on issues, challenges, problems, and the institution's own desired solutions, though it can also contain neutral descriptions of existing structures and processes related to the Areas of Focus.
  - In both cases, *include only material that the PRT heard from the institution*, not the PRT's own findings, conclusions, suggestions, recommendations, or prescriptions. The PRT's ideas for improvement should appear in the *Menu of Options* (see Preparation for Visit 2 below).
  - For additional guidance, refer to the sample SIV provided.
- Peggy reviews the *Summary*, suggests improvements as needed, and shares those suggestions with the PRT Lead. The Lead incorporates that feedback as appropriate, along with any final input from the PRT members, and forwards the final version of the *Summary* to the CEO and point persons (with a copy to Peggy and to PRT members). *This part of the process should be completed within 10 days of the visit, and sometimes must be completed much more quickly, depending on the date of Visit 2.* If the CEO then requests any tweaks in wording that the Lead incorporates, the Lead sends a copy of the final revision to Peggy and to PRT members. The

Lead also shares the final version with the Leads of any other PRTs then serving institutions in the same district.

- Identify and request from the institutional point persons any additional documentation that you would like the institution to provide before Visit 2.
- All PRT members should participate in the post-visit evaluation.

### ***Preparation for Visit 2***

- The dates of the first and second visits are almost always established at the same time, early in the PRT process. In some cases, however, the date of the second visit might not have been settled by the time of the first visit. In those cases, at the end of the first visit, the PRT Lead requests date options for the second visit from the CEO and point persons. *The second visit should take place as soon after the first visit as schedules permit*, consistent with development and timely delivery of the *List of Primary Successes and Menu of Options* as described below; an interval of about five weeks is ideal. If none of these date options works for the PRT, Peggy or the Lead requests alternatives until a mutually agreeable date is identified.
- The PRT Lead reminds the CEO to designate (if she or he has not already done so) a specific group that will draft the *Innovation and Effectiveness Plan* (the I&EP Drafting Group) with the guidance of the PRT during the second visit. The Group may be ad hoc or existing, and if necessary, the CEO may designate two or even three Groups, each of which is to draft a portion of the Plan. The Group(s) should be relatively small, yet reasonably representative with respect to applicable functions and constituencies, to strengthen both the Plan and its subsequent implementation.
- PRT Preparation of the *List of Primary Successes and Menu of Options*
  - Based on the documentation review, interviews, meetings, further discussions, and your own collective expertise, identify the institution's primary successes and main issues, along with ideas for improvement and best practices that the institution should consider for each Area of Focus in its *Innovation and Effectiveness Plan* (I&EP). Consult the Vision Resource Center at <https://visionresourcecenter.cccco.edu/> for information and other resources that might prove useful in the *Menu of Options*.
  - Share the primary successes, main issues, and ideas for improvement and best practices with each other, and combine and consolidate as needed.
  - Based on these discussions, using the current template provided, create a *List of Primary Successes and Menu of Options* for the institution's consideration in developing its I&EP. The *Menu of Options* section consists of specific ideas for improvement and/or best practices, along with references and models or examples of applicable practices successfully used at other institutions, in each Area of Focus. Refine the draft as needed based on feedback from the whole team, and send the resulting version to Peggy for review *at least 10 days before Visit 2*. The *Menu of Options* is your opportunity to make constructive suggestions for action that will help the institution improve its effectiveness.
    - The Primary Successes may be drawn from the SIV's Activities Underway column, and/or reflect additional progress and successes.
    - The Areas of Focus entries should be *exactly the same* as those in the SIV, unless an Area has been added.
    - Wherever possible, present at least two options to address a given issue, to avoid the implication that there is only one solution to that issue.
    - Evaluation of the longer-term effects of the PRT process has demonstrated that in very many cases, continuing work by an institutional champion or champions on implementation of the I&EP is crucial for sustaining improvements in the long run. If that practice would be beneficial to your client institution, consider including language—either in a single Overall option or in an option under each applicable Area of Focus—to the following effect: *“Designate, and provide continuing support for, one or more champions who take on leadership*

*responsibility for implementing your I&EP and sustaining progress. An effective champion may be an individual (with a succession plan in case of turnover) or a standing committee whose charge explicitly includes the applicable work.”*

- References, models, and examples from other institutions or the literature help provide the concrete guidance that institutions in search of a way forward often need, so include them whenever PRT members can come up with ones they regard as potentially useful for the client—even if only in part. The client institution is free to modify or reject any part of any model that does not prove useful to them as is.
- Wherever possible, present at least two references, models, or examples for any given option, again to avoid the implication of a single solution. Pick references, models, and examples that appear to the PRT to be at least a reasonable fit with what the team has seen of the client institution. If you have just one to offer for a given option, use qualifying language such as “One approach that has been successful at other institutions is X at <link>, but of course other approaches can be equally successful.” Note that you do not have to include a link if you have none; referring, for example, to the “SLO assessment and tracking process at ABC College” is sufficient.
- In the unlikely event that the PRT is unable to identify any useful references, models, or examples for a given option, just leave the Models, Examples, and Comments column blank for that option.
- If the Areas of Focus are unusually numerous or complex, and it seems likely that the institution might be unable to tackle all of them within the initial 12-month term of their Seed Grant, feel free to suggest among your Options phasing the work over a longer period of time, with suitable institutionalization.
- For additional guidance, refer to the sample MOO provided.
- Peggy reviews the document, suggests improvements if needed, and shares those suggestions with the PRT Lead. The Lead incorporates that feedback as appropriate, along with any final input from the PRT members, and forwards the final version of the document to the CEO (with a copy to Peggy and to PRT members) and point persons *at least one week before the second visit*, with a request for the CEO to review it and suggest any tweaks before distributing it further. If the CEO does suggest any tweaks in wording that the Lead incorporates, the Lead sends a copy of the final revision to Peggy and to PRT members. The Lead also reminds the CEO that it is crucial to distribute the document to the I&EP Drafting Group(s) immediately, and suggests that the I&EP Drafting Group(s) meet at least once to discuss it in preparation for the second visit.
- The Lead shares the final version with the Leads of any other PRTs then serving institutions in the same district.
- At the same time, the Lead sends to the CEO and point persons another copy of the I&EP template (they already received one copy early in the process), with the request to distribute it to the I&EP Drafting Group(s), too.
- About two weeks before the visit, the Lead reviews the draft schedule for the visit and list of I&EP Drafting Group(s) members sent by the point persons.
- Then, in a brief zoom/phone meeting, the PRT Lead, CEO, and point persons confirm the structure and schedule of the second visit. The length of the visit depends on the I&EP Drafting Group(s) involved and the complexity of the issues to be covered, and might range from half a day to a full day. Over the course of the visit, the PRT might split up to accommodate the schedule, or might meet as a whole with the I&EP Drafting Group(s), whichever works best.

## **Visit 2: Helping the Institution Develop Its Innovation and Effectiveness Plan**

- It is best to meet with the CEO (and others that he or she might wish to include) at the beginning of the visit and at the end of the visit, if possible.

- Meet with the I&EP Drafting Group(s).
  - Walk through the *List of Primary Successes and Menu of Options*.
  - Discuss the I&EP template. (The template is an important transitional repository for objectives, associated planning elements, and, assuming the institution wishes to request a Seed Grant to expedite implementation of the Plan, the Request for IEPI Resources, which is required to obtain that grant. Note, however, that the components of the Plan should at some point be integrated as applicable into the institution's existing planning processes and documents.) Remind participants also of the *Guidelines for Completing the I&EP*, which the point persons should have shared with the Drafting Group well before the visit.
  - Assist the I&EP Drafting Group(s) as they work on the I&EP over the course of the visit. Provide constructive, colleague-to-colleague advice, commentary, and feedback as needed. Ideally, the Group(s) should actually draft portions of the *Plan* (using the template and guidelines) as the day's discussions of each Area of Focus occur, to expedite progress. However, some might choose instead to take notes on those discussions, and draft the *Plan* itself after the PRT's departure.
  - Most often, the discussions during this visit do not delve into how the client institution plans to spend the Seed Grant funds, and that part of the I&EP is finalized after the PRT's departure. However, some institutions might benefit from guidance on the best uses of that money. For example, the PRT might remind the Drafting Group that these are one-time funds, intended to kickstart work on the I&EP, and that long-term progress in some Areas of Focus will likely require a further commitment of resources after expiration of the Grant. If appropriate, the PRT might offer suggestions on how one-time funds might be used over the next 12 months to lay the foundation for such institutionalization.
  - The I&EP Drafting Group is unlikely to finish an approved draft during the visit. The PRT Lead should encourage the Group(s) to consult the *Guidelines for Completing the I&EP* and to finish the draft within one week if possible, and ask the CEO or point persons to email the draft in Word (not PDF) to the Lead and Peggy for feedback as soon as it is complete.
  - Note that the final I&EP is to be signed by both the CEO and the Academic Senate President. The signature of the Senate President (or Presidents, on an I&EP in a multi-campus District that does not have a District-level Senate) simply signifies that collegial consultation with the Senate or its President has occurred.

## **Follow-Up to Visit 2**

- The Lead reviews the draft *Plan* and sends comments to Peggy (including any final input from the PRT members) regarding the following:
  - Whether overall it represents a reasonable approach to addressing the Areas of Focus
  - The extent to which it incorporated or responded to PRT guidance
  - Any glaring omissions
  - Any landmines or stones in the road
- Peggy reviews the draft *Plan*, incorporates the Lead's feedback as appropriate, communicates with the Lead to resolve any differences, makes a final set of suggested improvements as needed, and forwards the final set to the CEO, with a copy to the PRT Lead. The CEO then incorporates the feedback as he or she sees fit, adds the signatures, and emails the final *Plan* to Peggy, with a copy to the Lead for distribution to the PRT. Upon receipt of the final *Plan*, assuming that it includes a request for IEPI resources to expedite implementation of the Plan, Peggy forwards to the CEO the application and agreement forms for a Seed Grant. The institution submits the Seed Grant forms as soon as local procedures permit. (Ordinarily, processing a properly completed and signed application and agreement and issuing the check takes four to six weeks.)
- The Lead shares the final version of the *Plan* with the Leads of any other PRTs serving institutions in the same district.

- All PRT members should participate in the post-visit evaluation.

### ***Preparation for Visit 3 and Any Subsequent Visits***

- After the institution submits the final I&EP and the Seed Grant forms, Peggy requests date options for the third visit from the CEO and point persons (though the PRT Lead should feel free to do so if the opportunity arises). *The third visit should take place two to three primary-term months (i.e., not counting intersessions and holidays) after the institution's receipt of the Seed Grant, if schedules permit.* By that time, the institution will have had a reasonable amount of time to begin implementation of the *Plan*. If none of these date options works for the PRT, Peggy or the Lead requests alternatives until a mutually agreeable date is identified.
- About a month before the visit, Peggy asks the substantive point person to provide a status report on implementation of the I&EP, a draft schedule for the visit, and a draft list of participants within two weeks. (The draft list of institutional participants should include individuals and groups who are in the best position to report on progress or wish to request implementation guidance from the PRT. Often the members of the I&EP Drafting Group(s), for example, participate in Visit 3.) He also asks for any quarterly reports on Seed Grant expenditures already submitted, any documents that the institution regards as crucial to the PRT's understanding of the progress it has made (e.g., a procedure or manual produced to fulfill an Objective or Action Step in the *Plan*), and any particular aspects of I&EP implementation on which the institution needs additional PRT guidance during the visit. Peggy distributes this information to the PRT upon receipt.
- Read the I&EP status report and other documentation supplied with it, and assess overall progress on the *Plan*.
- Identify areas for praise and areas for concern, and prepare a set of positive comments and questions accordingly for the CEO and other participants during the visit. Pay particular attention to the sustainability of the improvements underway. Share the comments and questions with the rest of the team, and consolidate them as needed.
- In the zoom/phone meeting about a week before the visit, the Lead and CEO discuss the draft schedule for the day and draft list of institutional participants. After discussion, the CEO or point person sends the final list of participants and agenda to the PRT Lead for distribution to the PRT (with a copy to Peggy).

### ***Visit 3 and Any Subsequent Visits: Following Up***

- The third visit is an important component of the PRT process, and has five primary purposes:
  - Gather information about early progress on implementing the I&EP to supplement the status report, using the Appreciative Inquiry approach. Note that this visit is *not* designed as a summative assessment of the extent to which the client institution has achieved the Objectives in the I&EP, but rather as an opportunity for them to request the PRT's advice on potential course corrections in the early stages of implementation.
  - Recognize and celebrate progress where appropriate, in keeping with IEPI's positive approach to technical assistance.
  - Provide advice on those course corrections where requested or otherwise appropriate, as colleagues helping colleagues.
  - Assess sustainability of the improvements underway, and provide advice as needed on sustaining long-term progress.
  - Reach closure on the visits component of the PRT process, for both the institution and the PRT, unless the institution requests one or more additional visits.
- During the visit, meet with the CEO (and others that he or she might wish to include) to discuss her or his perspective on progress to date. Share positive comments and ask questions to enrich your understanding.
- Meet with participating groups to discuss their perspective on progress to date.
  - Listen to the reports of progress.

- Share positive comments and ask questions to enrich your understanding.
- Provide constructive advice, commentary, and feedback, including ideas or suggestions to improve implementation of the *Plan* and the sustainability of progress as needed.
- Discuss whether one or more additional visits would be helpful to the institution.
- If requested, meet once more with the CEO to answer any questions, and provide an oral summary of ideas or suggestions to improve implementation and/or sustainability of the I&EP.

### ***Wrap-Up and Evaluation***

- If appropriate, meet by zoom/phone as a team to share final observations.
- Prepare a brief (typically one or two pages) written *PRT Process Summary Report* summarizing the institution's progress to date on its I&EP objectives in each Area of Focus, along with suggestions for sustaining progress or addressing remaining challenges, and email it to Peggy. A sample report is provided for guidance on format and content.
- Peggy reviews the document, suggests improvements if needed, and shares those suggestions with the PRT Lead. The Lead incorporates that feedback as appropriate, along with any final input from the PRT members, and forwards the final version of the document to the CEO and point persons (with a copy to Peggy and to the PRT members). The Lead also shares the final version of the *Report* with the Leads of any other PRTs serving institutions in the same district.
- All PRT members should participate in the final visit evaluation.
- Peggy might ask the CEO to provide a description of any PRT-related improvements in institutional structures or processes that have proven especially successful, for possible posting in the Vision Resource Center or sharing in other venues.
- The CEO, point persons, PRT Lead, and/or selected members may participate in an evaluation of the longer-term effects of the PRT process about 10-12 months after the final visit.
- Annually thereafter, the external evaluator may contact the PRT Lead, members, CEO, and/or point persons to gather more information about longer-term effects of the PRT process.

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