

**Institutional Effectiveness Partnership Initiative**  
**Partnership Resource Team Member and Lead Job Description**  
**December 1, 2022**

- I. Institutional Effectiveness Partnership Initiative (IEPI) visiting teams providing technical assistance to client institutions are referred to as Partnership Resource Teams (PRTs).
- II. Members of each PRT are expected to do the following:
  - A. Commit to at least three visits to the client institution:
    1. Initial assessment of institutional areas of focus as identified in the Letter of Interest, discussion of institutional actions taken to date, and determination of scope of assistance
    2. Review and discussion of suggested options for the institution's consideration in its Innovation and Effectiveness Plan, and assistance to the institution in preparation of that Plan
    3. Follow-up on institutional progress in implementing the Plan, with advice on course corrections if needed, and guidance on sustaining progress
  - B. Participate in Partnership Resource Team training as requested.
  - C. Apply a high standard of expertise and judgment in helping the institution improve its institutional effectiveness.
  - D. Take into consideration the specific needs, culture, and practices of the institution.
  - E. Recognize institutional personnel as problem-solving peers.
  - F. Convey a helpful attitude toward institutional personnel and other PRT members.
  - G. Focus on sustainable sound practices and solutions more than on problems.
  - H. Keep an open mind about issues and prospective solutions.
  - I. Maintain the highest standard of sensitivity with respect to information about client institutions.
  - J. Coordinate all work with other PRT members and the Lead.
  - K. Prepare for each visit thoroughly, including the review and analysis of applicable documents and formulation of both substantive and clarifying questions before each visit.
  - L. Attend meetings and listen with care to client-institution personnel as needed to arrive at a thorough understanding of the institution's needs and issues related to institutional effectiveness.
  - M. Summarize what you have heard at the end of the first visit in discussion with the Lead and your teammates.
  - N. Respond in timely fashion to requests for information and paperwork (e.g., feedback on documents, travel reimbursement forms) by the PRT Lead, Project Director, or other IEPI staff.
- III. In addition, the PRT Lead is expected to do the following:
  - A. Participate in additional training for Leads as needed.
  - B. Coordinate in timely fashion as needed with the Project Director, including a follow-up phone or Zoom debrief after each visit; with the client institution CEO and point persons; and with Leads of other PRTs providing services in the same district.
  - C. Provide leadership and coordination for the PRT, from preparation for each visit, through the visit itself, to follow-up, in accord with the *Model Process for Partnership Resource Team (PRT) Visits*.
  - D. Discuss with PRT members expectations for communication with the institution between visits.
  - E. Notify the Project Director as soon as possible if it becomes clear that the PRT requires augmentation to address the applicable needs and issues.
  - F. Notify the Project Director of concerns or issues at the institution beyond the scope of the PRT.
  - G. Seek to resolve any significant concerns or issues that arise in the PRT's work; notify the Project Director if such efforts are unsuccessful.
  - H. Lead the PRT in preparation and delivery of the following products in accord with the *Model Process*:
    1. Summary of Initial Visit, both oral (at the end of the initial visit) and written (soon after the visit)
    2. Written List of Primary Successes and Menu of Options well before the second visit
    3. Feedback on the institution's draft Innovation and Effectiveness Plan after the second visit
    4. Commentary and questions on the institution's status report on implementation of the Innovation and Effectiveness Plan before the third visit
    5. After the third visit, a brief written PRT Process Summary Report summarizing the institution's progress, along with suggestions to improve implementation or sustainability of the Plan