

**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