

SITE VISITATION

PLANNING AND IMPLEMENTATION GUIDE

“Our Schools have so much to offer each other. It’s crucial that we put the systems in place and take the time to keep learning from the fabulous work that is happening in schools all around the country.”

Kathy Simon, former Co-Executive Director CES National

Developed by Elaine Rector
E3|OSSI School Change Coach

- ❖ *Schools need to learn from one another.*
- ❖ *Schools learn about themselves when they open their doors and welcome visitors to observe their school in action.*
- ❖ *With careful planning, both visitors and hosts gain valuable understanding about the will, skill, and knowledge needed to run a successful school.*

Site Visitation Planning Materials

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Schools and communities must work together to achieve educational excellence and equity for every student. Opening up a school site to study tours and participating as a host school to help others transform education is one way to move forward together. Both host and visiting schools benefit from the experience. Each school deepens understanding of its own practices and also explores possibilities through new eyes.

Types of school site visitations:

1. **Study Tour:** Host school prepares opportunities for visitors to observe classes, engage in dialogue with staff and students and investigate their history, structure, culture and teaching/learning practices. Host school identifies areas of expertise and works closely with visitors to craft an itinerary that meets the needs and expectations of the visitors to see and learn about the special focus areas for this school.
2. **Site Exploration:** Host school opens itself to visitors to inquiry-based explorations of a school site to see what they have designed and implemented. The area of focus of the actual site visit is jointly determined between the host and visitor. The components of the visit are designed specifically for the visiting group, based on strengths of the host school. Schools with similar areas of focus (e.g. arts schools, technology schools, career pathways) often host each other to help implement their similar vision/mission.
3. **Demonstration Site:** Host school determines that one or more areas of emphasis are in full, or near full implementation. Host school is therefore willing and able to provide not only the chance for visitors to see program(s) in action, but to engage in professional development and facilitated next-steps strategic planning. Continued implementation coaching may be provided by the host school.
4. **Studio Classroom:** Host school invites visitors to participate in professional development opportunities held on their campus which involve observation and investigation of classroom instruction as a central focus of professional development activities. Often an external expert coach provides the PD in conjunction with the host teachers who open their classrooms and practice to the observation of others while they receive real-time coaching from the external expert.
5. **Meeting of the Minds:** Host school invites visitors to participate in professional development designed to bring together educators from multiple places to learn from each other. Host site facilitates ample opportunities for all participants to share educational practices with each other. Host school uses the resources of their site to enhance the professional learning. Often classroom observations are included in the session, but this visitation may also take place on non-student contact days.
6. **Reciprocal Support Visits:** Schools partner with each other and visit each other's sites. Often there is a mentor and mentee school. The mentor school hosts the first visit and follows up with a visit to the mentee school to give feedback and additional coaching. It can develop into a long term relationship.

When properly planned, visits to other schools and especially classrooms offer deep, multidimensional, challenging insights and are a powerful impetus to planning and change
Jill Davidson, *"Our Schools Have So Much to Offer Each Other – Strategies and Structures for Effective School Visits"*.

HOST SCHOOL

Hosting a visit at your site allows you to share your success stories and progress. You can have a positive influence on the teaching and learning at other schools while also learning about yourself. Educators need opportunities to interact with each other, to share what they are doing, and collaborate around critical issues in education. Hosting site visits allows educators to develop greater understanding of their own program. They learn how to articulate what they do and to benefit from dialogue around successes and challenges in education. Often during visits, host staff learns just as much as the visitors. The benefits to your school are a major reason why you host others. It's not just to share what you've learned, but to gain new insights and clarity about your own programs and processes.

Host Site Considerations:

pre-planned focus	OR	developed jointly by host and visitor(s)
limited to one site-team	OR	includes individuals/teams from many places
specific dates only	OR	negotiated opportunities throughout the year
fees to cover actual costs	OR	fee structure to generate revenue source
primarily opportunity to see	AND/OR	primarily opportunity to learn (PD focus)
debriefing facilitated by host	AND/OR	debrief facilitated by visitors/outside consultant
clarity outcomes for visitors	AND	clearly defined benefits for the hosts
using visitations to reach out	AND	connecting community through visitations

"Be who you are and say what you feel
Because those who mind don't matter
and those who matter don't mind.
You have brains in your head. You have feet in your shoes.
You can steer yourself in any direction you choose.
You're on your own and you know what you know.
You are the guy who'll decide where to go."

Dr. Seuss

Host School Getting Started:

Before the Visit . . .

- Identify **contact person** and staff support to manage site visit logistics.
- Identify **site visit leader** who will oversee the plans and facilitate visiting groups. *(should be someone other than the principal)*
- Select and define **area(s) of focus** for visitors:
 - What is special about our school?
 - What can we show visitors so they understand what our innovations are really like?
 - Which adult and student artifacts will be most helpful in telling and showing our story?
- **Enroll staff** in the process and clearly identify both impact and benefit of hosting.
- **Work with district** around finances *(fees, release time for staff, benefits, level of involvement, minimizing of disruptions)*.
- **Develop materials** and web site around site visits:
 - introductory letter, background information, school profile, visitation brochure, highlight key features of your school.
- Determine possible **visitation dates**. As you consider which dates to offer, try to arrange times when your instruction is normal or when it fully highlights what the visiting school wants to see (student-led conferences, project panel assessments, advisory, differentiation, project-based learning, integrated instruction, etc.)
- Set up **visitation schedule**.
- **Send working agenda**, itinerary, school map and directions to visiting school's team.
- Make available a **secure place** for visitors to leave valuables: purses and lap tops.
- Order **refreshments**.
- Make up **packets of information** for the visit.
- **Prepare staff and students** to guide, greet, host and coach visitors.
- Make sure everyone understands the **purpose of hosting a visit**: both for the visitors and the host school.
- Arrange **release time** for staff to meet with visitors.
- **Train student guides**: consider scripting with them. *(See page 9)*
 - Set up classroom greeters who can explain what's happening in their classes.
- Organize adults and students for **dialogue sessions** with visitors.
- Assist teachers to create **learning environments** with evidence of student work, relevant artifacts, public records of previous instruction, etc.
- **Prepare students** for the visitation. Let them know who is coming and what they wish to see. Remind students that they are to conduct themselves as usual and not "perform" for the visitors. The visitors have come because of the good things happening here at their school. Visitors want to see what a "normal day" is like and learn from what is happening on a daily basis.
- If visiting team will be provided coaching to plan how to take what they learn back to their school, arrange for this **facilitated coaching** and create support documents.
- Make sure everyone understands the **purpose of the visit** and expectations of the visitors. Pre-plan what will be said and shown so that your school can clearly communicate with visitors about what you have to offer. These plans will ensure a good match between what you have to show and what they want to see. If visitors want to see something that really does not exist in your school, let them know.
- Remember, you don't have to have worked out "all of the bugs". Visitors want to learn from your process and progress; from both your **successes and challenges**.

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- Feel free to plan to **engage the visitors** in helping you address an issue still facing your school. New eyes on a problem or target area can help you define what you are working on.
- **Gather evidence** from the visitation and solicit advice and suggestions from the visitors.
- Require the visiting school to send information about their **school profile**, essential questions for their visit, and description of the visiting team members. Use this information to prepare the facilitation team to better meet the visitors' needs.
- Work with teachers to have **space in their rooms** for small groups of visitors to be as unobtrusive as possible. Student greeters for each classroom can direct visitors to the best places to stand or sit while observing each class.

"Frequently visited host schools have learned that they need to prepare thoughtfully to forestall ennui and burn out on the part of their faculties. A constant stream of visitors can be disrupting, not renewing"

Ann Cook, Co-Director

New York City's Urban Academy

During the Visit . . .

- Have front office staff **welcome visitors** and have them sign in, receive name tags, place parking passes on their cars and learn where they can safely leave valuables.
- Provide an **orientation to the school**, explain the visitation norms and share itinerary. *(if this session is not done by the school principal, make sure that there is a time during the day when the team meets with the official leader of the school.)*
- Share with visitors the kind of **feedback you hope they will give** in order to be most helpful to the continuous improvement of your school
- Remind visitors about **student confidentiality**. Clearly explain whether visitors can interact with students during visitations and the limitations of picture taking (e.g. feel free to take pictures of artifacts and public records in classrooms but not students).
- Plan to gather staff and students with the visitors for **dialogue at lunch** or other time.
- Following the formal visitation to classrooms, the host school should **facilitate a Q & A** session as well as a debriefing which helps both schools benefit from the visit.
- Make sure visitors provide you with **written feedback** so that the hosting school benefits from the visit as well. When the visiting school relays feedback, host schools have a chance to see what's happening in their classrooms from multiple fresh perspectives. Provide a feedback form and time to complete it during the visit.
- Build in periodic times during the visit for the team to **record their thoughts**, impressions and questions.

"We can't teach people about a wide range of things; too many people want to learn too many different things from a single visit. So we looked at our core values. I looked specifically at what was most important to me and my school in the next three years of work, the things I felt I couldn't be pulled away from. We used these areas of focus (personalization, advisories and professional development) as a way to invite visitors to participate in our work. Because we said publicly that we have something to offer in these areas, we're accountable to that. It functions as another incentive to work on these things. It has to be the way you do it, otherwise every phone call decides the focus of your day. Even something as simple as a visit has to fit into the vision of the school."

Greg Peters, Principal

Leadership High School in San Francisco

After the Visit . . .

- **Thank** all of the adults and students who helped with the visitation.
- **Compile** the written feedback from the visitors.
- Since visitations offer opportunities for mutual learning, spend time with your staff to determine **what was learned** from the visiting school. What questions did they ask? How well could we answer them? What did they notice? What did we learn about our program, our staff, our students and our school from the hosting process?
- Meet with critical staff to **debrief the visit** and develop a list of lessons learned.
- Figure out how to **capture the lessons** learned so that the entire school benefits from the hard work of hosting visitors.
- Consider how best to **use the feedback** and insights from the visitors to improve upon or address any issues or ideas about your school.
- Prepare any **additional data or information** you promised the visiting school and send it as soon as possible.
- Set up any **follow-up activities** with the visiting school (e.g. on-going e-mail, additional PD from your staff at their site, reciprocal visit).
- Re-examine your procedures and materials for visitations and **make additions or revisions as needed** while the experience of hosting a school is still fresh.

Planning to Host a Visitation - what to have ready:

- ✓ Vision/Mission and how they impact all aspects of the school
- ✓ Develop norms for visitors that guide expectations and social interactions (see examples in Appendix O-P)
- ✓ History of site/program development (*annotated timeline/journey map*) (see examples in Appendix E-F)
- ✓ Successes and Challenges using relevant data
Cause Data: what adults did - Effect Data: what students show
Use both quantitative statistics and qualitative case studies
(see chart in Appendix G)
- ✓ Compile professional articles that most influenced the design and implementation of your school or program(s). Sharing these resources will be very helpful to the visitors. Decide whether they should be investigated before, during or after the visit to your school.
- ✓ Generate a checklist with concise explanations of the key areas of focus that can be observed and learned about at your site. Include a map of specific places where there is evidence or artifacts that will help explain essential key points on the tour.
- ✓ Consider creating a signal system for classroom visitation (e.g. red door sign indicates there's a test or something happening that doesn't allow visitors – green sign welcomes visitors) and provide information about the class including the kind of feedback the teacher seeks and level of interaction that is appropriate with the students.
- ✓ Develop an exit feedback form on NCR paper to encourage visitors to share their questions, observations and thoughts with you and have a copy to take home. It is helpful if your agenda

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includes periodic times for participants to do reflective writing throughout the day on these forms.

- ✓ Think long-term about what structures you need to create to sustain hosting other schools. Consider a separate phone line, staff or student interns to run the program, meeting space, and funding structures.

“Successful schools are led by a set of agreed shared beliefs.
As it is said: ‘If you stand for nothing you will fall for anything’ or
‘Control your own destiny or someone else will!’”

Anon

“We need a metamorphosis of education.
From the cocoon a butterfly should emerge.
Improvement does not give us a butterfly,
only a faster caterpillar.”

Anon

STUDENT AMBASSADORS

Students are at the heart of any school.
Student Ambassadors and Greeters put a face on all aspects of a school.

STUDENT AMBASSADORS

- Work with staff to provide tours of the school for visiting schools, new students, their families and community members
- Share student perspective on panel presentations
- Provide student voice on the school's web site and promotional materials
- Help to create a welcoming school environment for all visitors
- Reflect the diversity of the student body population
- Learn key facts about the school and tailor their presentations to the purpose of the visit and needs of the visitors.

CLASSROOM GREETERS

- Work with classroom teachers to welcome visitors to a class
- Welcome visitors and explain what is happening in the classroom so the teacher and other students can continue teaching and learning
- Guide visitors to appropriate place to sit and observe
- Answer questions and provide visitors with information when it is appropriate given the learning activity in the class
- Ideally, there is a student greeter for each classroom

Involving students and using site visitations to develop student leadership is an important component of sharing schools that are truly student-centered.

Schools with strong Student Ambassador Programs might want to suggest that visiting schools bring students as part of their team.

Students learn more about their education and gain pride in their schools by participating in sharing what's happening from the students' perspectives.

Opportunities for reflection and refinement of current practices come from these chances for students and staff to plan and host engaging visits from other schools.

Developing a Student Ambassador and Classroom Greeter handbook, basic scripts and mapping out where around your school there is evidence of key points to be highlighted on each tour will be helpful in formalizing student engagement in the visitation process.

Funding Issues:

“When you charge people, they’re way more accountable. Quite often, before charging, visitors wouldn’t show up.”

Sally Grovesa, Principal’s Secretary
Souhegan HS in Nashua, NH

“Charging for visits adds another level of work that needs to be done. We’re selective about the timing and amount of visits. We’re not trying to get wealthy. For us that’s not the point.”

Janice Adams
Merio Station HS in Beaverton, OR

Costs: Host Schools	Costs: Visiting Schools
<ul style="list-style-type: none"> ▪ Staff time to manage pre-visit communicate ▪ Staff time to coordinate logistics and run visits ▪ Staff time and printing to prepare materials ▪ Postage and phone calls ▪ Release time and subs for faculty to meet and work with visitors ▪ Food and beverages 	<ul style="list-style-type: none"> ▪ Travel (mileage, airfare, hotel, meals) ask hotel for government rates ▪ Substitutes and/or stipends <p><i>Even if hosts don't charge a fee, it's generous to offer to pay for food and printing of materials.</i></p>

Ways to Cover Costs	Example Fees:
<ul style="list-style-type: none"> ▪ School District Professional Development Funds ▪ Grants from Private Funders ▪ Fee-for-Service charged by Host School 	<ul style="list-style-type: none"> ▪ <i>\$225 per person per day Eugene International HS for materials and PD at site</i> ▪ <i>200 per person per day Hillsdale HS for staff time, materials and food</i> ▪ <i>\$200 per person per day Stanford Redesign Network PD, materials & national speakers,</i> ▪ <i>\$100 per person per day Souhegan HS in Nashua, NH to cover costs</i>

Save Money - Visit Yourself!

“It’s interesting to think about doing site visits to your own school. We always go on site visits to other schools and look with a critical eye. It’s a really valuable thing to pretend that you’re an outsider in your own school, to look systematically at data, to visit classrooms.”
Conducting site visits at your own school, using observation tools and protocols and-if nothing else-getting out of your own classroom and routine can offer a fresh perspective (with no jet lag!).”

Mike Klonsky,

Small Schools Workshop University of Illinois

VISITING SCHOOL

Finding the time, finances and courage to visit another site in order to change your own school is difficult, but worth it. Be sure to create the mental space for the visiting team to be able to make sense of the experience, communicate what they saw to people who weren't there and collaborate honestly to incorporate insights into your own school.

"We won't allow a visit if parents and students are not included. It's not worth the effort. Parents and student add legitimacy in terms of what's brought home, legitimacy that's not there if we're seen only from the teachers' and principals' point of view. Parents and students have to be able to feel the need for change; they have to be able to say, 'Yeah, I saw that.'"

George Wood, Principal

Federal Hocking High School in Steward, Ohio

Visiting Site Considerations:

specific "look-fors" interested in seeing	OR	focus developed jointly by host and visitor(s)
limited to just your site-team	OR	interested in connecting with other visitors
specific dates only	OR	open to negotiating best time to visit
willing to pay to cover just actual costs	OR	agree/negotiate to fee structure
primarily opportunity to see	AND/OR	primarily opportunity to learn (PD focus)
debriefing facilitated by host	AND/OR	debrief facilitated by visitors or consultant
clarity of outcomes for visitors	AND	clearly defined benefits for the hosts
use visitations to improve own school	AND	connect/network with the host school

The Stanford Redesign Network recommends that teams include both teachers and administrators (ideally the principal and a district administrator). The most successful study tour teams have site and district administration involved.

Before the Visit . . .

- **Assemble team** (teachers, administrators, parents, students, community members) The purpose of your visit will drive the membership of your team. Also, check with the host school(s) to make sure they can and are willing to accommodate the size of the team you wish to send.
- **Identify Point Person** who will provide leadership of the visiting team, before, during and after the visitation. If this person is NOT the principal, then establish clear plans for the active involvement in all phases of the work by the principal.
- Brainstorm what you would like to see and learn. Each individual may have his/her own ideas, but the effective visitation team takes time prior to the visit to assess their own situation, look at their own data and **determine** what **common goals** or purposes the visitation serves.
- **Research** possible appropriate visitation **sites**.
- **Select site(s)**: Contact the principal or contact person for that site for a pre-planning conversation. The site may have materials and protocols to help you plan an effective visit. It is also wise to know whether and when you can visit before doing much pre-planning from your end.
- **Develop essential questions** and target areas of focus to clearly define what you want to see and learn from your visit.
- Work with the host school to help **ensure that what they have to show matches** what you want to learn about and see.
- **Develop key points** about your school, its current status and desired changes to share with host school
- **Review your own school data** to clarify your current status, needs and potential changes.
- You may wish to develop and share a **“journey map”** or annotated timeline to help your team realize where your school has been and where it is going. Sharing it with the hosts will help them better understand your school and tailor the visit to meet your needs.
- **Contact the host site(s)** with tentative dates and explanation of desired learnings.
- **Negotiate fees and costs** with the host school (*see Funding Issues page 10*)
- Finalize arrangements: **coordinate travel** with host school to ensure adequate time for the planned agenda. (*Ask for government rates if you plan to stay in a hotel*)
- Be sure to **arrange for substitutes** and coverage at your home site so that the visiting team can be completely focused on the visit.
- Go over information about the school(s) you will be visiting. Make sure every team member **has background knowledge of the school(s)** and understanding of why you are visiting them. Share any materials sent from the host schools and be sure to check out their web site before you go.
- Set clear expectations for all members of the visitation team around appropriate dress, commitment to openness and to be as unobtrusive in classes as possible.

Visiting School continued . . .

“Many visitors show up at schools without enough forethought, and clarifying basic information about the host school fritters away precious time. Do your homework! It’s like visiting a foreign country. If you don’t know anything, you miss nearly everything, but if you know a little bit about where you are, your visit will be that much richer.”

Ann Cook, Co-Director

New York City’s Urban Academy

During the Visit . . .

- Plan to **arrive** 15 to 20 minutes **early**.
- Provide journals, clip boards, etc. so that everyone on the team will **record observations** and make written reflections.
- Divide group into **smaller subgroups** with attention to varied perspectives in each group.
- Check with the host school around whether visitors **can interact with students** while visiting classes.
- Remind visiting team to **respect the confidentiality** of students in how they record observations and discuss them later.
- Visitors should **refrain from being overly critical** of the host school. It is a professional courtesy to help promote what is good about each school while also learning from their struggles, but not gossip about them while on their campus or after the visit.
- Refresh the team around the **essential questions** that will guide the visit. When participants know what they are looking for and what they want to learn, they take away more.
- Remind the team to **be open to the unexpected** and fully take in as much as possible while visiting.
- Be sure your team understands that the host school deserves **high quality feedback** so that they too benefit from opening their practice to outsiders.
- During the visit, **take good notes** so that you can be specific in the feedback and debrief process.
- Plan not only to debrief with the host school but to have a **private debrief time** as soon after the visit as possible. An hour right after the visit is ideal so that you can capture some of the initial energy from the site visit.
- Set time for a **longer follow-up session** which includes reviewing compiled notes and reflections from each participant.
- **Collect written notes** and reflections from your team

“Visitors are ultimately and rightly selfish and hosts should be ready to offer experiences beyond the standard tour. However, visitors should not expect their experience to feel too polished. No one is looking for simple answers. We are not perfect; we have things that are wrong. To build trust we say, ‘You’re going to see things that will cause questions, and we want to know what those questions are.’

We need to get something back from this interaction.

Greg Peters, Principal

Leadership High School in San Francisco

Visiting School continued . . .

After the Visit . . .

- Participate in a **Debrief Session** with the Host School.
- Make sure someone on the visiting team **takes notes** that you can refer to later.
- If time permits, be sure to **ask any questions** that came up during your visit. A Q & A session at the end of the visit is helpful both for the visitors to get their questions answered, and for the hosts to learn what questions came up for visitors.
- It is also wise to have a short **“private debrief”** with just your team. This session should be done off campus of the host school.
- While impressions are still fresh, **capture some of the insights** and information your team gleaned that they may not have wanted to share with the hosts.
- **Tape recording a brief statement** from each member of the team can be very useful in reminding folks what they want to address in the longer processing session you will have later at your school.
- **Compile written notes** and reflections for later use.
- **Review observations** and impressions from each member of the visitation team.
- **Establish key learnings** and decide how you will share what the team learned with the rest of the school staff. Include questions and suggestions that were prompted from the visit as well as ideas from the host school.
- Make sure all members of the team **understand their important role** in debriefing, sharing information with the rest of the staff and working on any plans to adopt and implement ideas that stem from the visit.
- **Create strategic plans** to move forward with one or more of the areas of focus using input from the visitation, readings and other sources for promising practices.
- **Send thank you notes** to the host school. It is especially nice to send notes directly to students and teachers who were helpful in providing you with insights during the visit.
- Think about opening your school to a **reciprocal visit** if you want to stay connected to the school you visited and if they can provide coaching and support for the changes you want to implement at your site.

“When visits are engaging, personalized, and focused, educators planning new schools or creating change in existing schools will have an image to share with colleagues about what is possible. Seeing innovative, personalized education in action allows you to be a more persuasive advocate for creating the right conditions from the ground up or for making those changes midstream.”

Peter Ross, Project Manager

Stanford University’s School Redesign Network

Leadership in Action

“Leaders... will be explorers, adventurers, trailblazers... leaders of leaders... They will gather around them people who have the future in their bones.”
Rowan Gibson

Leaders from all sectors (administration, teachers, staff, students, parents, school board members, community members) make it possible for schools to be different, change and meet the needs of their students. Site visitations need to include time and emphasis on what the leaders do to spark, nurture and sustain the necessary changes. Time to focus on how leaders are developed and supported to confront the issues that hinder transformation needs to be addressed as part of the long-range plan for transforming schools.

The principal's responsibility is to provide leadership and direction to the team (whether hosting or visiting) before, during, and after the visitation. Yet, the principal cannot lead reform alone. There must be a team of leaders who use the insights gained from site visitations to inspire change.

Hosting and visiting gives schools opportunities to develop leaders and create the necessary shared leadership required to successfully transform and maintain effective schools.

Principals and Teacher/Leaders often appreciate the chance to meet privately for “job-alike” confidential sharing. If these meetings cannot be set up as part of the visitation, they can take place by phone, e-mail or in person before or after the site visitation.

Maintaining a relationship between host and visiting schools can be very mutually beneficial.

It is especially important for small school leaders to have people they can call upon for advice and support.

On-going collaboration among schools is a major benefit of site visitations.

“The aim of visits is to gather ideas and examine strategies in order to shed light on your own practices. Some schools have relinquished their sense of agency, as if the answer is outside. It seems like they have given up confidence, their authority. People planning their school's next steps have to be guided by how well the kids are achieving learning goals; that has to be the driving force. Then it can be useful to bring in an outside perspective, consider it, and maybe even reject it.”

Jacqueline Ancess, Co-Director National Center for Restructuring Education, Schools, and Teaching

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