



INTERNATIONAL BACCALAUREATE ORGANIZATION

Primary Years Programme

Guidelines for visiting teams

(authorization and programme evaluation)

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Introduction

This *PYP guidelines for visiting teams* should be read in conjunction with the following documents and guides.

1. For **authorization visits**:
 - *PYP guide to school application*
 - *PYP application form part B* and accompanying documentation sent by the school
 - *Application procedure for candidate schools*
 - *Rules for authorized schools: Primary Years Programme*
 - *General regulations: Primary Years Programme*
 - *Programme standards and practices*
 - *IB learner profile booklet*
 - *PYP school guide to the authorization visit.*
2. For **programme evaluation visits**:
 - *PYP guide to programme evaluation*
 - *PYP programme evaluation self-study questionnaire* and accompanying documentation sent by the school
 - *Rules for authorized schools: Primary Years Programme*
 - *General regulations: Primary Years Programme*
 - *Programme standards and practices*
 - *IB learner profile booklet.*

Further information can be found in *Schools' guide to the Primary Years Programme* (<http://www.ibo.org>).

We thank you for agreeing to take part in authorization and evaluation visits for the Primary Years Programme (PYP). These visits are an important means of ensuring quality control while providing advice and support for schools as they develop the PYP. The presence of trained practitioners of the PYP on IBO visiting teams is important. They provide both knowledge and direct experience of the programme and help the visits to serve the aims of school improvement as well as quality assurance.

Both authorization and programme evaluation visits are the responsibility of the regional offices. Training of future members of visiting teams is also organized by the regional offices. This *PYP guidelines for visiting teams* complements the training, practical advice and instructions provided by the relevant regional office.

For the credibility of the process, the purposes of authorization and programme evaluation visits, as well as the role of visiting team members, are clearly stated in the corresponding guides (particularly in the *PYP school guide to the authorization visit* and in the *PYP guide to programme evaluation*) and other documentation available to schools. Visiting team members are requested to study these documents carefully before joining a visiting team. In addition, the regional office will provide specific details regarding the organization and timetable for the visit, travel arrangements and reimbursement of expenses.

This *PYP guidelines for visiting teams* provides general guidelines for visiting teams on the following:

- the process of the visit
- the conduct of the visit
- the structure of the authorization/evaluation report.

The process of the visit

Following receipt of the completed *PYP application form part B* or the self-study questionnaire with accompanying documentation and the application fee, the IBO will arrange with the school when the authorization/evaluation visit is to take place. Each authorization visit normally lasts two days and each evaluation visit normally lasts two and a half days, but this may vary according to the size of the school.

Before the visit

The school will ensure that the teaching staff have undertaken IBO-approved professional development and that the materials required for the IBO visiting team have been prepared.

The dates for the visit are decided in consultation with the school. The IBO selects and appoints the visiting team and nominates a team leader (who may be a member of IBO staff or an experienced visitor), keeping members informed of the arrangements for the visit and the preparatory work required.

An agenda for the visit is arranged in consultation with the school and the team leader.

During the visit

The focus of the visit is formal interviews and informal dialogues with individuals, teams, or groups; as many as possible of those who are/will be involved in the school's programme should be included in the process. The IBO visiting team will primarily:

- meet with administrators, teachers, parents and students
- view the school's facilities
- assess resources and instructional materials
- gather information leading to the visit report
- visit classes.

For parts of the agenda, visiting team members will be together for visits and meetings, but other parts of the agenda may involve single visits to classes or interviews. Time must be reserved during the visit, and in the evenings, for team members to meet to compare observations and perceptions.

After the visit

After the visit, the visiting team produces a report and this is sent to the regional office.

In the case of initial **authorization**, the regional director then makes a recommendation to the IBO director general who will make a final decision and inform the school directly. The regional office sends the school a list of commendations, recommendations and matters to be addressed.

For **programme evaluation**, the regional office sends the full report to the school, including commendations, recommendations and matters to be addressed.

The IBO visiting team

Composition of the team

The IBO invites suitably qualified practitioners and administrators of the PYP to be trained to conduct authorization/evaluation visits and to participate as members of visiting teams. The regional offices appoint a visiting team leader and team members (two to three, depending on the size of the school).

Staff from the school being visited cannot be members of the visiting team. Normally, members of the team may not visit schools where they have recently taught, or with which they otherwise have, or have had, a close relationship. If it presents a potential conflict of interest, team members should not visit a school in close proximity to their own.

Responsibilities and training

When visiting a school, members of the visiting team are required to be fully aware of the aims of the visit and to follow the procedures for conducting the visit as described in this guide. Their role is **not** to appraise or assess individual teachers or administrators.

The regional offices are responsible for the training and induction of new visiting team members. Team members are expected to be available to make a number of authorization/evaluation visits and may be asked to assist in training new team members.

Reimbursement of expenses

The school will be required either to pay a fixed amount or to reimburse the expenses of visiting team members through the appropriate regional office/regional representative, or to make local arrangements at no cost to the visiting team. Expenses incurred in such visits include:

- travel (including visas where necessary)
- accommodation
- subsistence.

The IBO provides visiting team members with an expenses claim form and guidance on the type of expenses that will be reimbursed, for example:

- responsibility for payment if a visiting team member arrives early or stays later than the scheduled visit
- advice on minimizing travelling costs
- guidance on what additional expenses are acceptable.

No honorarium is paid to visiting team members.

Preparation for the visit

The best possible use can be made of the time available if the visit is planned carefully and both the visiting team and the school are fully prepared. This is achieved by the exchange of information and consultation between the IBO, the school and the visiting team members.

IBO preparation

The IBO regional office:

- liaises with the school and the visiting team members so that all are aware of the practical details and are informed of their specific functions during the visit
- has studied in detail the *PYP application form part B* and supporting documentation to decide if the school is ready for an IBO visit
- decides the length and dates of the authorization/evaluation visit, and the number of team members
- considers the proposed agenda items and, after consultation with the school and the team leader, approves the final agenda.

Team preparation

IBO visiting team members should ensure that, during their preparation, they:

- read this *PYP guidelines for visiting teams* and all parts of the relevant guides (for authorization or programme evaluation)
- read the *PYP application form part B*, or the self-study questionnaire, and any other documentation supplied **before** the authorization/evaluation visit
- use the preliminary information to highlight any significant issues to follow up during the visit and, if they require further information from the school, inform the IBO and do not contact the school directly
- inform the IBO **before** the agenda is drafted if they have a request for any specific meetings, interviews or observational visits.

Part of the normal preparation is an initial briefing meeting for IBO visiting team members immediately before the visit, that is, depending on arrival times, the evening before going to the school or at breakfast. This allows team members to:

- raise any queries and check their schedule
- ensure they have the necessary documentation
- make sure they understand the code of conduct
- discuss the distribution of work
- discuss school-specific problems or areas requiring special attention.

Meetings

The visiting team leader, in consultation with the school, decides which visiting team members and representatives of the school should attend which meetings. Specific meetings with teachers or visits to classes will be with the agreement of individual teachers.

Preparation of the authorization/evaluation report can begin after the first day of the visit, allowing the visiting team to:

- discuss and clarify findings
- work out the structure and emphasis of the report
- agree on major commendations, recommendations and matters to be addressed
- consider whether or not to recommend authorization (for authorization visits only).

Conduct of the visit

IBO policy

The IBO requires visiting team members to carry out their professional and ethical responsibilities in such a manner that the school perceives the visit to be constructive and non-threatening. The experience should be welcomed by the school as a complement to its own self-evaluation processes and as a means of assisting its development.

For the credibility of the process, while account is taken of the circumstances of individual schools, procedures should be consistent throughout the visit whatever the location of the school. To this end, IBO policy is that every team member should:

- make sure they are fully prepared, are familiar with the relevant documentation and have considered appropriate interview questions in advance
- not assess individual students or appraise the performance of the teachers in any way, either as individuals or as a group
- remember the objectives of the visit: they should not become involved in school disputes or local politics and should avoid being used to further the cause of any individual.

Confidentiality

Members of the IBO visiting team **must not** leave any written comments pertaining to the visit with the school. In the case of authorization visits, the team must make it clear that it is the IBO director general who will make the final decision on the school's authorization and that the visiting team's report will represent a major factor in that decision. Therefore, team members should not imply whether authorization is likely to follow or not. This is particularly important as schools will expect to hear the views of the team, both positive and negative, in terms of its preparedness to offer the PYP.

Supporting evidence

It is essential that any evaluative judgments about the school's preparedness or ongoing ability to offer the PYP can be supported by evidence acquired during the interviews and dialogues. Team members should always check facts, try not to rely on the evidence of a single member of staff and avoid speculative statements.

To ensure that judgments are supported by first-hand evidence obtained during interviews, meetings and class observations, team members should make notes for future reference. This should not be done intrusively. Visiting team members should not make premature judgments on the basis of the preliminary material sent by the school; it is intended to be useful background information only.

Outcome of the visit

Exit interview

During the exit interview, and based on the visit (and on the review of the submitted application or evaluation self-study), the visiting team provides the school with its initial observations in the form of commendations, recommendations and matters to be addressed (as appropriate). The school must attend to any matters to be addressed in order for authorization to proceed or to be maintained.

The visiting team will also share orally the observations made during the visit. **Nothing in writing should be left with the school.** The team should comment on noteworthy practices as well as concerns that were observed. This should also be the final opportunity for visiting team members to check their facts and to ensure that the subsequent report accurately depicts the school setting and its plans for the PYP.

In the case of authorization visits, the visiting team will **not**, at this time, provide the school with a definitive response regarding the school's prospects for authorization but should explain that the authorization visit is but one part of a larger process. The IBO director general will make the final decision regarding full authorization or denial of authorization.

For both authorization and programme evaluation visits, the visiting team should stress to the school representatives that the team members will continue discussions among themselves after the visit and that adjustments to their oral report may be made, including the addition of any matters to be addressed (where appropriate).

Visit report

Principles

The visiting team will then complete a written report for the regional director. In writing the report, the visiting team will be guided by the following principles.

- The emphasis of the report will concern the capability of the school to offer and continue to develop an effective Primary Years Programme.
- The report will not be speculative or prescriptive, unless the PYP offered at the school does not meet the IBO's requirements.
- The report will not mention any individual by name at any stage. If specific examples of good practice have been highlighted during the visit, this will be conveyed to the school by means other than the official report.
- The accuracy of factual statements in the report will be checked with the school.
- The written report will be consistent with oral comments that may have been given to the head, or to other staff in the school, at the time of the exit interview.
- The conclusion, and matters to be addressed (if any), will be consistent with statements and judgments contained in the main body of the report.

Production of the report

The visiting team leader is responsible for producing the draft report that is sent to the IBO.

1. Following the visit, the visiting team leader, guided by IBO examples and instructions, writes a draft report based on discussions with, and information provided by, the visiting team members.
2. The draft report is sent to other visiting team members for comments and confirmation.

3. After consultation with other members of the visiting team, and within one month of the visit, the visiting team leader sends the final version of the draft report to the regional office for further consideration by senior staff or a committee.

In the case of an authorization visit, the final decision concerning authorization or denial of authorization will be made by the IBO director general. The school will be notified of any postponement of authorization, if applicable, by the regional office.

Format and content

All reports follow a standard format and the regional office will ensure that all issues are covered in strict accordance with these guidelines and the sample report provided. The format and content of reports should be consistent and not vary as according to the location or size of the school.

Authorization visit report

The authorization visit report must follow the structure outlined below. Your regional office will provide you with a template that can be filled in electronically.

1. **Visiting team** specifies the names of the visiting team members and the date of the visit.
2. **Description** gives a brief, factual description of the school and the educational programmes it offers.
3. **Finances** provides a brief statement about the school's budget and ability to pay all direct and indirect costs associated with the PYP, based on documentary evidence of audited annual school budgets and discussions with the school administration.
4. **Implementation of the PYP** is an account of how the school has organized its implementation of the programme, with particular reference to its preparation to meet the requirements for authorization. It focuses substantially on information gleaned from discussions during the visit, as well as on the documentation received before the visit.

This section of the report may be structured around the relevant PYP standards as follows: philosophy, organization, curriculum and the student.

Note: It is not expected, at the point of authorization, that the school's programme will be judged wholly on whether each standard shows satisfactory development.

5. **Commendations, recommendations and matters to be addressed** (where applicable). If the programme standards are used to structure the authorization visit report, the commendations, recommendations and matters to be addressed should be listed, as appropriate, under those standards. In addition, a summary of all the commendations, recommendations and matters to be addressed should be included.
6. **Authorization recommendation** states whether or not the visiting team thinks the school should be authorized.

The authorization visit report is intended to provide a complement to the school's application documents, to assist the regional office in forming a recommendation for authorization, and to inform the IBO director general on the capability of the school to offer the PYP effectively.

Programme evaluation report

The programme evaluation report must follow the structure outlined below. Your regional office will provide you with a template that can be filled in electronically. The programme evaluation report provides the visiting team's judgment on which standards show satisfactory development and which require significant attention. For sections 4–8 of the report, the visiting team's observations and perceptions form the basis for commendations, recommendations and matters to be addressed by the school within the time specified by the regional office.

1. **Visiting team** specifies the names of the visiting team members and the date of the visit.
2. **Introduction** indicates when the school was first authorized and/or previously evaluated.
3. **Description of the school** gives a brief, factual description of the school.
4. **Standards and practices** specifies which standards/practices show satisfactory development and which require significant attention.
5. **Section A: philosophy** (includes commendations and recommendations).
6. **Section B: organization** (includes commendations and recommendations).
7. **Section C: curriculum** (includes commendations and recommendations).
8. **Section D: the student** (includes commendations and recommendations).
9. **Conclusion**
10. **Matters to be addressed**