

PROTOCOL 3.0

NATIONAL SCIENCE FOUNDATION SUPPORTED SUMMIT-P SITE VISIT

While individual circumstances will dictate variations, it is expected that SUMMIT-P Site visits will be planned and conducted according to the following:

- Approval for the sites to be visited and the institutions, evaluators, and Project Management team members to visit and the dates for the visits will be given by PI Susan Ganter with input from the project Management Team.
- Lead responsibility for organizing and conducting the site visit will reside with the institution that is being visited.
- Consistent with the premise of SUMMIT-P, the visiting team from an institution will include at least one mathematics faculty member and one faculty member from a partner discipline. At least one evaluator and one other member from the Project Management Team will also participate.
- The site visits will be of at least a day and a half in duration. The dates will be proposed by the host institution and the visiting institution.
- Prior to finalizing plans for the site visit, all participants shall clearly outline their specific goals for the visit. This includes a different set of goals for: faculty from host college; faculty from visiting college; project evaluators; and the project management team.
- The host institution will prepare a report on the current status of their work.
- The goals of the participants and the host institute status report will be distributed prior to the meeting to all participants

The goals and status report will be shared by the host PI with all participants in site visit. The site visit will include the following components:

Component	Participants	Description
Project Highlights 90 – 120 minutes This session is the central piece of the visit. Ideally it will take place near the beginning of the visit.	All visitors Math faculty Disciplinary faculty Course developers and pilot instructors Department chairs Deans of schools participating partner disciplines Provosts, vice presidents, etc.	This will be a carefully planned set of presentations and/or facilitated discussions by all participants in the project: partner disciplines, PIs, local evaluators, instructors, course developers, etc. The Project Management Team representative will typically be asked to make a presentation about the overall work of SUMMIT-P. The nature of this overview will depend on a number of factors: turnover of college administrators, nature of project highlight component in earlier site visit, etc. Host team should be creative and flexible in developing overview session that is different from original site visit and involves large numbers of partner discipline faculty and instructors.

Plans for Sustainability of the project This presentation/discussion could be part of the Project highlight component or a separate session	PIs should carefully consider who within their institution can help develop (and carry out) this plan	The development and presentation of the Sustainability plan is at the core of the final official site visit to take place under SUMMIT-P.
Class room visits to mathematics courses being developed/refined as well and (possibly) courses offered by partner discipline faculty members	All visitors and any interested faculty/administrators	It is expected that each visitor will have opportunity to observe at least two or three class sessions. Local administrators and faculty from partner disciplines and other mathematics faculty should be encouraged to visit classes prior to the actual site visit.
Discussions among students and external visitors	Students in the pilot class and visitors not from host college	Goal of session is for visitors to see from the student perspective the impact of course innovations. Students need to be prepped in detail by host institution concerning what are portions of the course have been changed. (Students won't know which aspects of the course are being modified under SUMMIT-P and they need to be briefed before the visit.) Session to be led by visiting team PI utilizing questions suggested by project evaluators.
Focus group of students conducted by evaluators	Students in pilot sections and evaluators (This will be a different group of students from the discussion group)	The evaluators will prepare protocols for the student focus group.
Discussions among visiting faculty and pilot instructors	Teaching faculty from visiting and host college	Emphasis will be on particular content or instructional approaches.
Discussions among visitors and host project PIs	Visitors and host project PIs	Project management, issues on how to recruit and engage faculty; problems, issues
Conversations among host and visiting partner discipline members	Host and visiting partner discipline faculty	Discussions would include ways in which collaboration was encouraged between partner discipline faculty and mathematics faculty as well as particular content.
Meals	Will vary	Various host faculty/administrators/ project PIs will share meals with visitors; some of the discussions described above may take place over a meal. The host college will use grant funds to pay for meals that are

		formal meetings. Off campus social meals should be paid by each individual's grant.
Sharing of developed or developing course materials	All participants	Course materials could be the feature of a special portion of the agenda and/or included as preparation for class visits, highlight session, discussions with students, etc.
Time for participants to complete post visit questionnaires	A questionnaire will be completed by each of the following teams/individuals: host PIs; visiting team; evaluator; project management team representative	These questionnaires should be completed before the site visit is concluded. An option should be provided to expand and refine, but a report should be submitted to the PMT representative as an "exit ticket" to the site visit.

After all site visit participants have reviewed the goal statements and the current status report and reviewed and modified the list of components, the host college shall prepare the actual schedule along with the goals of each set of participants and distribute it to all participants.

Typically the host college will reserve hotel rooms and arrange for local transportation. The visitors will pay their own transportation, meals and hotel expenses.

Prior to the site visit:

The host PI will share project goals and site visits goals with all participants and any additional information that would be useful, including information concerning participants (e. g. pictures, role in project)

Subsequent to the site visit:

The Project Management Team visitor will assure that informal feedback is provided on a timely basis to the host PI.

In addition, the host PI, the PI of visiting team, the project evaluator and the Project Management Team representative will each complete the post-site visit questionnaire. The Management team representative will assure that these reports are completed and shared with the Project Management Team and other SUMMIT-P participants.

SUGGESTIONS FROM FIRST TWO ROUNDS OF SITE VISIT PARTICIPANTS

1. **There have been transportation problems in previous visits. Suggest arranging schedules and planned time of arrival to minimize impact.**
2. **Suggest including presentations from both sets of partner disciplines (hosts and visitors).**
3. **PMT representative should be asked to provide overview of MAA Curriculum Foundations Project and SUMMIT-P to demonstrate the role the host institution is playing in this national curriculum effort.**
4. **Consider visiting partner discipline classes and/or labs.**

5. A campus tour might be helpful to provide context to institution being visited.
6. It is helpful for visitors to receive course syllabi and possible classroom examples before visiting classes.
7. Time should be provided for visitor to process what they have learned and to consider impact on their own work.
8. Unanticipated mix-ups usually occur and host PI needs to have clear calendar to handle unanticipated situations.
9. Hosts really appreciate opportunity for debriefing / informal feedback;
This could be in person at end of meeting and/or hangout discussion within week or so of visit.
10. Create a detailed schedule of the visit ahead of time with dates, times, rooms and people who will be attending. Distribute the schedule to everyone who will be attending the meetings.
11. Have all hosting PI, Co-PIs and administrators meet before the site visit. Debrief them on what the visit's goals are and what role each person is playing. If someone will give a presentation, make sure they know what they should be talking about and if there will be any unusual circumstances, to plan accordingly.
12. Create a "Portfolio" of each person involved in the site visit (including local administrators, grant office administrators) with pictures and distribute before the visit. This will help make pre-visit introductions.