

Checklist for Endorsement Logistical Arrangements

The following checklist should guide endorsement unit onsite visit coordinators in making the necessary arrangements for the onsite visit:

- Talk with the PSC consultant to confirm all arrangements for the onsite visit. A consulting visit with the PSC Consultant must be scheduled. Either the endorsement unit representative or the PSC Consultant may initiate the call to begin planning the visit.

- Make hotel/motel arrangements for all BOE team members and observers
 - It should be conveniently located to the endorsement unit in order to decrease transportation time.
 - A private room should be reserved for each BOE team member and the state observers.
 - There should be a restaurant in or near the hotel. Endorsement unit representatives should not plan to eat meals with the BOE team. Meals often are used for work sessions.
 - Arrange for direct billing to the endorsement unit, if at all possible. If it is impossible to arrange for direct billing, let the BOE team members know that they will be responsible for the hotel bill and they will be reimbursed immediately after the travel voucher is received. (Direct billing should be arranged for BOE team members only. PSC consultant and observers are responsible for their own hotel expenses.)

- Inform all BOE team members including the observers, of directions to the hotel and agency.

- Arrange transportation from the hotel to the endorsement unit for Day One and Day Two. Sometimes the provision of a van or station wagon for the BOE team to use would be appropriate.

- A meeting room should be reserved for the team members to work from the time of their arrival at both the endorsement unit and the hotel. The room can double as your exhibit room at the endorsement unit, but it should not be used for individual or group interviews. These rooms should be available for the entire time of the visit so that materials may be left there. Refreshments should be available at appropriate times during the day and evening.

- ❑ Check with the BOE chair on how the meeting room should be arranged and which of the following supplies will be needed:
 - Newsprint
 - Magic Markers
 - Masking Tape
 - Overhead Projector
 - Screen
 - Map of visitation sites
 - Pens for Transparencies
 - Pens, Pencils, etc.
 - Writing Tablets
 - Typing/Computer Paper
 - Personal Computers and Printers

- ❑ Set up exhibit room with materials that the BOE team will want to see during the two day visit. All of the items in the exhibit room should be clearly marked with a directory of exhibits listed and color coded by standard.

- ❑ Arrange support services for the BOE team during the visit. The support might include the following:
 - Secretarial assistance
 - Access to a telephone
 - Arrangements for all site visits
 - Access faculty records

- ❑ Arrange for interviews and visits as outlined in the template for the onsite visit in consultation with the BOE chair. Specific interviews should be arranged by the BOE chair before the onsite visit. *However, the BOE team may need to conduct follow-up interviews with certain individuals to clarify issues and/or concerns raised during the BOE team discussions.*

- ❑ Check with the BOE chair about arrangements for noon meals.

- ❑ Provide clear directions and/or escorts to scheduled interviews.