**Protocol for setting up the initial meeting:**

**1.** Using your contacts, determine who is the “right” person, who has decision making power, for this meeting (Administrator in charge of curriculum, Supervisor, Superintendent, PD Coordinator, Curriculum person, Lead Teacher). Purpose of this call is to set up a 30 minute meeting with the person who either has the decision making power or can influence the decision making.

**2.** Make the call to the “right” person, “We have some great professional development services, through a Federal Grant, that we can offer to your staff free of charge. Can we schedule a 30 minute meeting for us to discuss your Continuous Improvement Planning (CIP) and your current Professional Development (PD) needs and determine how these services can benefit your district?”

**3.** Send e-mail confirmation: This is an e-mail confirmation to discuss professional development opportunities, free of charge through a federal grant, that are aligned to your Continuous Improvement Plan on \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ with \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.”

**Protocol for the meeting itself:**

**Information to be included:** *The purpose of this meeting is to engage in a dialogue and to build a rapport with districts. We want them to feel heard and we want to be available to respond to their identified needs. You will want to take notes and ask follow-up questions as appropriate. It is important to not jump into offering the Foundational Services offerings until you have demonstrated that you have listened to them and are responding to what they have identified as needs. Below are some suggested questions to guide you in this endeavor.*

* Introduce themselves and thank them for taking the time to meet with you
* Give them more information on the grant
  + Foundational Services in seven different areas (**just this statement– no detailed information**)
* Ask them what is going on in their district related to Continuous Improvement and Professional Development
* Ask what is working well (this helps develop rapport)
* Ask what the current PD focus in the district
* Ask if they could narrow it down to three PD areas, what would be those top three PD needs
* Do you anticipate anything changing for next year (shifting or adding)?
* Summarize what you have heard them identify as their top needs
  + e.g. “I heard you say that you have had a heavy focus on Reading, but would like to shift the focus towards Writing. Would you like me to tell you a little bit about the Writing Matters training available to your teachers/trainers at no charge?”
  + e.g. “I understand you’ve done some work with NGSS, but would like to get all of your teachers more aware of how different these standards are and what they might look like in the classroom. Would you like to hear a little bit about our Foundational Services training in Science?”
* Ask them about the particular services we can offer. Would you like to discuss options for setting up days/times to schedule some of these trainings? This is our current professional development calendar…

Leave them with the FS Overview sheet and content area flyers that match their needs

**Protocol for after the meeting:**

1. **Follow-up e-mail** – thank them for their time and recaptures the notes from the meeting and includes a next steps “action plan.”
2. **Follow-up phone call to confirm next steps and schedule dates and times for FS trainings/networking sessions**