**Personnel Exchange Network**

The Personnel Exchange Network (PEN) connects states directly to promote wider use of successful methods of education data collection, governance, maintenance, reporting, and use. Visits are cost effective, easy to arrange, and facilitate the sharing of effective organizational and technological practices among states, school districts, and other organizations. Through PEN, staffs from different states engage, typically in on-site face-to-face visits, to facilitate the development of a more collaborative relationship. Visiting states[[1]](#footnote-1) can learn from the practices and lessons learned of their peers, while host states can benefit from the process by re-examining and reflecting on their own work, and by gaining an outsider’s perspective.

This document provides instructions for completing a PEN application and visit, as well as tips from past participants of PEN visits. This compilation of insights and lessons learned is intended to help future PEN participants, both host and visitor states, to maximize the benefits of their PEN visits. Organized chronologically from trip planning through post-exchange follow up, this guide can help states through this process, which has proven to be a beneficial resource for many states.

**Instructions for Completing a PEN Application and Visit**

1. Discuss PEN with your assigned State Support Team (SST) member to determine if PEN is the best way to obtain needed information, and, if so, which state would be an ideal host state.
2. Once you identify a potential host state, ask the state if it is willing to host a visit and provide the requested information.
3. Obtain a copy of the PEN application from your SST and develop Sections A – C of the application with SST.
4. Submit your application to Robin Taylor (robin.taylor@sst-slds.org), who will review it with your SLDS Program Officer. The Program Officer evaluates each application on need, desired outcomes, the ability of the host state to assist in meeting those outcomes, and available funding.
5. Robin will notify you of the decision on your PEN request within two weeks of its receipt, and, if it’s approved, will send instructions for making travel arrangements and completing the final report.
6. Work with your host state to develop and finalize your agenda and participants from both the host and visiting state.
7. At least two weeks before the exchange, submit a final agenda and participant list to Robin.
8. Robin will send you a template for your final report.
9. Within three weeks after the exchange, submit your final report to Robin, who will share it with your Program Officer, Program Analyst, and SST member.

**Tips for Participating States**

 **Before the Visit**

**Determine where support is needed.** Before making a PEN request, states should work with their SST to identify existing technical assistance resources, such as Best Practice Guides, Issue Briefs, working groups, webinars, conference calls, and existing meetings like the SLDS conference, MIS, StatsDC, and EIMAC.

**Research PEN host state.** This will assist a visiting state in formulating relevant questions for the host state. It will also allow the visiting state to immediately begin goal-oriented work, rather than taking time out for a general overview of the host state’s legislative, financial, and programmatic background. A host state does not need to become an expert on the visiting state’s situation, but a brief phone call prior to the PEN visit will ensure that differences are understood and taken into account when planning for and assisting with the visiting state’s future work.

**Create a detailed and specific agenda.** The visiting state should draft an agenda that goes beyond the general topic area and includes specific areas of focus and goals for the visit. The visiting state should send the agenda to the host state prior to the visit, leaving enough time for collaboration. Your SST member can assist you in developing your agenda.

**Request specific individuals/staff positions if necessary**. This will benefit the visiting state and ensure that only key staff members are pulled away from their regular work to be included in the visit meeting(s). The visiting state should not be afraid to ask the host state for a draft list of participants. If a visiting state would like to hear from additional host staff, they should inquire. The host state should make an effort to fulfill visiting state requests for specific participants, and both states should be open to options such as webinar or teleconference if necessary.

**During the Visit**

**Present a sufficient amount of information.** A host state should be thorough without overloading the visiting state with new information. Background and additional information can be sent to the visiting state before the visit. Electronic and hard copies of documents can also be provided at the end of the visit for visiting state staff to review on their own time.

**Allow visiting state to see work in progress.** This may include allowing the visiting state to attend stakeholder meetings, take part in training sessions, shadow an individual, or visit a district or school. This allows visiting state staff to see the process, rather than just the desired results. The experience of taking part in an actual training or stakeholder meeting can give the visiting state an understanding of the time, energy, and resources that go into facilitating these aspects of the project and may allow for greater knowledge retention.

**Schedule time to assist the visiting state in planning their next steps.** To ensure that the knowledge gained during the visit does not go to waste and critical next steps are taken by the visiting state immediately following the visit, the agenda should include time to address next steps and a timeframe for the visiting state. For example, during each of its PEN visits, Oregon works with visiting states to create a 100-day plan before these states return home. This document details planned actions going forward from the time of the visit.

**Assign an appropriate point person to respond to follow-up questions.** Make sure that the visiting state has contact information for a specific individual or group before the visit ends. The contact person for the visiting state should be knowledgeable about the needs of the state and the topics discussed. They should also have a workload that will allow them to respond to the visiting state’s questions post-visit.

**After the Visit**

**Be prepared to begin specific, goal-oriented work.** Upon their return home, the visiting state must be ready to begin work, following the prescribed plan that they developed with the host state during the visit. The visiting state should assign specific staff members to be responsible for individual tasks and should make every attempt to stay on target to accomplish goals according to the timeline created.

**Follow up with PEN partner state.** When closing the visit, both states should agree upon a specific date and time for check-in calls. This will assure the visiting state will have a chance to ask follow up questions, while the host state will be able to set aside a specific amount of time for follow up. In this way, both states will avoid multiple calls from several members of the visiting state staff regarding the same issue. In addition, setting a specific time for follow up keeps the visiting state accountable and ensures that they make progress toward the goals discussed at the visit.

1. Note that "visiting" state may not do the traveling. In some cases, the "host" state may actually visit the state in need of assistance through PEN. [↑](#footnote-ref-1)