Guide to consultancy

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Published May 2023

Published by the International Baccalaureate Organization, a not-for-profit educational foundation of Rue du Pré-de-la-Bichette 1, 1202 Genève, Switzerland.
Website: ibo.org

IB mission statement

The International Baccalaureate aims to develop inquiring, knowledgeable and caring young people who help to create a better and more peaceful world through intercultural understanding and respect.

To this end the organization works with schools, governments and international organizations to develop challenging programmes of international education and rigorous assessment.

These programmes encourage students across the world to become active, compassionate and lifelong learners who understand that other people, with their differences, can also be right.

THE IB LEARNER PROFILE

IB learner profile

The aim of all IB programmes is to develop internationally minded people who, recognizing their common humanity and shared guardianship of the planet, help to create a better and more peaceful world.

As IB learners we strive to be:

INQUIRERS
We nurture our curiosity, developing skills for inquiry and research. We know how to learn independently and with others. We learn with enthusiasm and sustain our love of learning throughout life.

KNOWLEDGEABLE
We develop and use conceptual understanding, exploring knowledge across a range of disciplines. We engage with issues and ideas that have local and global significance.

THINKERS
We use critical and creative thinking skills to analyse and take responsible action on complex problems. We exercise initiative in making reasoned, ethical decisions.

COMMUNICATORS
We express ourselves confidently and creatively in more than one language and in many ways. We collaborate effectively, listening carefully to the perspectives of other individuals and groups.

PRINCIPLED
We act with integrity and honesty, with a strong sense of fairness and justice, and with respect for the dignity and rights of people everywhere. We take responsibility for our actions and their consequences.

OPEN-MINDED
We critically appreciate our own cultures and personal histories, as well as the values and traditions of others. We seek and evaluate a range of points of view, and we are willing to grow from the experience.

CARING
We show empathy, compassion and respect. We have a commitment to service, and we act to make a positive difference in the lives of others and in the world around us.

RISK-TAKERS
We approach uncertainty with forethought and determination; we work independently and cooperatively to explore new ideas and innovative strategies. We are resourceful and resilient in the face of challenges and change.

BALANCED
We understand the importance of balancing different aspects of our lives—intellectual, physical, and emotional—to achieve well-being for ourselves and others. We recognize our interdependence with other people and with the world in which we live.

REFLECTIVE
We thoughtfully consider the world and our own ideas and experience. We work to understand our strengths and weaknesses in order to support our learning and personal development.

The IB learner profile represents 10 attributes valued by IB World Schools. We believe these attributes, and others like them, can help individuals and groups become responsible members of local, national and global communities.

Introduction

This document provides candidate schools with additional information regarding the consultation stage. The document should be read in conjunction with other key IB documents that provide information on the authorization process, the IB's philosophy, details of each programme and specific information on the IB's operational and programmatic expectations for schools.

Role of the consultant

During candidacy, the school's day-to-day point of contact will be the IB educator assigned to serve as the school's consultant. Each consultant has experience as a member of staff at an IB World School and has been trained by the IB to provide support and guidance to candidate schools. Consultants do not complete candidacy tasks for their assigned schools; instead, they facilitate and offer expertise to the members of the school community who are completing these tasks.

The consultant's role is that of an adviser. Schools should not hesitate to be candid about the work they have done and have yet to do, and the aspects they are finding challenging. Consultants are best able to provide support when they have a clear picture of the school's context, including its strengths and opportunities for development.

Consultants offer ongoing informal feedback during their remote sessions and provide formal feedback through the consultancy reports. These reports include updates on the school's progress towards meeting the requirements for authorization; summarize the school's plans and offer guidance regarding next steps; and provide the consultant's advice on whether the school is ready to apply for authorization. Though schools are strongly encouraged to carefully consider this advice, the final decision to apply for authorization is made by the school.

Consultants provide 20 hours of remote support each candidacy year; conduct one two-day consultation visit during the candidacy period; and provide both a consultancy visit and an end-of-consultancy report.

Activities

Building initial understanding

During the initial remote consultation session with the school, the consultant will seek to establish an understanding of the school's status in relation to the requirements for authorization, referring to the school profile and Application for candidacy, the *Programme standards and practices*, the criteria for authorization and the Application for authorization in order to do so. This understanding of the school's starting point will allow the consultant to work with the school to identify the areas that will require the most effort and to develop a detailed, prioritized plan for activities to be completed during the candidacy period.

Establishing a communication plan

The consultant serves as the school's day-to-day point of contact at this stage in the authorization process.

It is important to establish a communication plan with your consultant from the beginning, working together to set regular check-ins via phone or email. Be sure to develop a realistic schedule for communication, for both you and your consultant, during your 20-hour remote consultancy. If the consultant fails to remain in regular contact, please let your programme relationship manager know.

Creating and implementing an action plan

Once the consultant understands the school's starting point, he or she will work with the school, over the next few remote consultation sessions, to refine the plans the school developed during the consideration phase; support the coordinator as he or she works with the school community to draft a more detailed plan of work; add items to the school's online action plan; update deadlines; and identify the parties responsible for each task.

The action plan will be continuously updated throughout the authorization process as tasks are completed and plans, responsibilities and timelines evolve. The school should also periodically revisit its projected timeline for authorization, with the consultant's input and guidance, to ensure that it remains aligned with the work to be done.

The action plan will include the full range of tasks that are part of the candidacy period, such as:

- establishing or building upon an existing collaborative planning practice in the school, so that the school community can effectively engage in culture, policy and curriculum development during candidacy and beyond
- developing or updating the required school policies in alignment with the IB's expectations for each
- planning and documenting the school's IB curriculum and plans for implementation
- making any additions or refinements to the school's facilities and resources, so that they will meet the IB's programme standards and practices, and allow the school to implement the programme it is planning
- conducting the consultation visit and reviewing the feedback offered in the consultation visit report
- planning for, and completing, the professional development (PD) required for authorization.

Consultation visit

The consultation visit is an opportunity for the consultant to observe the school's culture and facilities, and to conduct conversations with the school community. The consultant will review the progress made by the school in its work towards meeting the requirements for authorization.

The school and the consultant will decide on a mutually convenient date for the consultation visit. The visit should be planned at least six weeks prior to the desired visit dates. Once you agree together with your consultant on the visit dates, please contact your programme relationship manager by email to confirm.

The school and the consultant will work together to set the agenda for the visit, carefully planning to ensure that the consultant has ample opportunity to get a sense of the school's progress and time to confer with various members of the school community.

The consultant will provide written feedback on this progress in the consultation visit report, which is provided to the school after the visit. Consultation visit reports—issued after the visit and at the end of the consultancy—inform the school and the IB of the school's progress. The school should carefully review this report, and use the feedback provided to review and refine its plans for continuing to work to meet the requirements for authorization.

Continuing candidacy

Throughout the remainder of the candidacy period, the consultant will advise the school as they:

- help the school community, including governance, legal guardians and students, deepen their understanding of the IB philosophy and the details of the programme for which the school is seeking authorization
- support teachers and staff as they connect with the IB's worldwide community through online communities, at face-to-face or online workshops, and other IB convenings
- review changes to school documentation as a result of the consultation visit and make final suggestions for improvements.

The school will:

- stay in regular contact with their IB consultant and programme relationship manager
- publicize the school's efforts to the broader community, including prospective IB students, in accordance with the IB's intellectual property guidelines
- use language provided by the IB to describe their status, ensuring that expectations are managed by making clear that authorization is not guaranteed; this language is provided to the school when they are awarded candidacy.

Conclusion of consultancy

When the school has completed the various tasks necessary to prepare for authorization, it will decide whether it is ready to apply for authorization. As part of this process, the school will want to confer with their consultant on the school's readiness to meet the expectations for authorization.

Once the school has decided to apply for authorization, the consultant will prepare and submit the end-of-consultancy report. In preparing this report, the consultant will review all aspects of the school's preparedness for authorization and provide feedback on the progress made since the visit. The consultant will also include their advice on the school's readiness to apply for authorization.

When the end-of-consultancy report is submitted, the consultancy ends. At this time, the school will shift its focus to finalizing its application for authorization for submission. The school and the consultant must not be in contact after the consultancy ends.

Upon review of the end-of-consultancy report, the school may decide it is not ready to apply for authorization after all and would instead prefer to extend the consultancy period. If this is the case, the school will contact its programme relationship manager to make the arrangement and to discuss the financial impact of this decision.

Additional resources

Making the most of your consultancy experience

PYP: Making the most of your consultancy
MYP: Making the most of your consultancy
DP: Making the most of your consultancy
CP: Making the most of your consultancy

Sample agendas

PYP consultation visit: Day 1

Approximate time	Objective(s)	Who	Venue
8.00am–8.45am	To explain the purpose of the consultation visit To respond to questions regarding the consultation and authorization processes To discuss the requirements for authorization and the school's progress towards meeting them	Head of School/ pedagogical leadership team	
8.45am–9.45am	To respond to questions regarding the consultation and authorization processes To discuss the requirements for authorization and the school's progress towards meeting them	PYP coordinator	
9.45am–10.00am	Break		
10.00am–11.00am	To visit the school facilities	PYP coordinator	
11.00am–12.30pm	To observe at least one class per year group	Classroom teacher(s)	
12.30pm–1.30pm	Lunch		
1.30pm–3.15pm	To observe at least one class per year group	Classroom teacher(s)	
3.15pm–3.30pm	Break		
3.30pm–4.15pm	To discuss the impact of the programme implementation on students and the school community	Legal guardian(s)	

PYP consultation visit: Day 2

Approximate time	Objective(s)	Who	Venue
8.00am–9.00am	To discuss the achievements and challenges in implementing the programme	Representative group of classroom teachers	
9.00am–10.00am	To discuss the achievements and challenges in implementing the programme	Representative group of single-subject teachers	
10.00am–10.15am	Break		
10.15am–12.15pm	Any other meeting/further classroom observation		
12.15pm–1.15pm	Lunch		
1.15pm–2.15pm	Any other meeting/further classroom observation		
2.15pm–3.15pm	What is next in the authorization process? To discuss the findings, review the action plan and determine a possible course of action	Head of School/ pedagogical leadership team and PYP coordinator	

MYP consultation visit: Day 1

Approximate time	Objective(s)	Who	Venue
8.00am–8.45am	To explain the purpose of the consultation visit To respond to questions regarding the consultation and authorization processes To discuss the requirements for authorization and the school's progress towards meeting them	Head of School/ pedagogical leadership team	
8.45am–9.45am	To respond to questions regarding the consultation and authorization processes To discuss the requirements for authorization and the school's progress towards meeting them	MYP coordinator	
9.45am–10.00am	Break		
10.00am–11.00am	To visit the school facilities	Staff or students	
11.00am–12.00pm	To discuss the achievements and challenges in implementing the programme	Subject-group leadership/year leaders	
12.00pm–12.45pm	To discuss the achievements and challenges in implementing the programme	Language and literature teacher(s)	
12.45pm–1.45pm	Lunch		
1.45pm–2.15pm	To discuss the achievements and challenges in preparing for the implementation of the programme To visit the school library/media centre	Librarian(s)	
2.15pm–2.45pm	To discuss the achievements and challenges in implementing the programme	Physical and health education teacher(s)	
2.45pm–3.30pm	To discuss the achievements and challenges in implementing the programme	Mathematics teacher(s)	
3.30pm–3.45pm	Break		
3.45pm–4.30pm	To discuss the impact of the programme implementation on students and the school community	Legal guardian(s)	

MYP consultation visit: Day 2

Approximate time	Objective(s)	Who	Venue
8.00am–8.45am	To discuss the achievements and challenges in implementing the programme	Individuals and societies teacher(s)	
8.45am–9.45am	To observe the programme implementation and use of facilities	Teachers and students in visited classes	
9.45am–10.30am	To discuss the achievements and challenges in implementing the programme	Design teacher(s)	
10.30am–10.45am	Break		
10.45am–11.30am	To discuss the impact of the programme on learning and teaching	Students	
11.30am–12.15pm	To discuss the achievements and challenges in implementing the programme	Language acquisition teacher(s)	
12.15pm–1.00pm	To discuss the achievements and challenges in implementing the programme	Arts teacher(s)	
1.00pm–2.00pm	Lunch		
2.00pm–2.45pm	To discuss the achievements and challenges in implementing the programme	Sciences teacher(s)	
2.45pm–3.30pm	To discuss the achievements and challenges in implementing the programme	Personal project/ community project team	
3.30pm–4.30pm	What is next in the authorization process? To discuss the findings, review the action plan and determine a possible course of action	Head of School/ pedagogical leadership team and MYP coordinator	

DP consultation visit: Day 1

Approximate time	Objective(s)	Who	Venue
8.00am–8.45am	To explain the purpose of the consultation visit To respond to questions regarding the consultation and authorization processes To discuss the requirements for authorization and the school's progress towards meeting them	Head of School/ pedagogical leadership team	
8.45am–9.45am	To respond to questions regarding the consultation and authorization processes To discuss the requirements for authorization and the school's progress towards meeting them	DP coordinator	
9.45am–10.00am	Break		
10.00am–10.45am	To respond to questions regarding the consultation and authorization processes To discuss the requirements for authorization and the school's progress towards meeting them	DP coordinator and any other member of staff who will be involved in the topics to be discussed	
10.45am–11.45am	To discuss the achievements and challenges in preparing for the implementation of the programme Development of the learner profile Extended essay (EE) planning Approaches to learning integration Integration of theory of knowledge (TOK) Contribution to creativity, activity, service (CAS) Collaborative planning Any other topic relevant to the DP team	All DP faculty	
11.45am–12.30pm	To discuss the achievements and challenges in preparing for the implementation of the programme	TOK teacher(s)	
12.30pm–1.30pm	Lunch		

Approximate time	Objective(s)	Who	Venue
1.30pm–2.15pm	To discuss the achievements and challenges in preparing for the implementation of the programme	DP teacher(s) (studies in language and literature, and language acquisition)	
2.15pm–3.00pm	To discuss the achievements and challenges in preparing for the implementation of the programme	DP teacher(s) (individuals and societies, and the arts)	
3.00pm–3.45pm	To discuss the achievements and challenges in preparing for the implementation of the programme	DP teacher(s) (sciences and mathematics)	

DP consultation visit: Day 2

Approximate time	Objective(s)	Who	Venue
8.00am–8.45am	To discuss the achievements and challenges in preparing for the implementation of the programme To visit the school library/media centre/laboratories	Librarian(s)/laboratory assistant(s)	
8.45am–9.45am	To visit the school facilities	DP teachers/students	
9.45am–10.30am	To discuss the impact of the programme on learning and teaching	Prospective DP students	
10.30am–11.15am	To discuss the achievements and challenges in preparing for the implementation of the programme	CAS coordinator	
11.15am–11.30am	Break		
11.30am–12.15pm	Classroom observations	Teachers, relevant staff and students in visited classes	
12.15pm–1.00pm	To discuss the advice to be given to students in terms of the programme and post-secondary educational options	Counsellor/DP coordinator	
1.00pm–2.00pm	Lunch		
2.00pm–2.45pm	To discuss the impact of the programme implementation on students and the school community	Legal guardian(s)	
2.45pm–3.30pm	To discuss the achievements and challenges in preparing for the implementation of the programme	EE coordinator/ supervisor(s)	
3.30pm–4.30pm	What is next in the authorization process? To discuss the findings, review the action plan and determine a possible course of action	Head of School/ pedagogical leadership team and DP coordinator	

CP consultation visit: Day 1

Approximate time	Objective(s)	Who	Venue
8.00am–8.45am	To explain the purpose of the consultation visit To respond to questions regarding the consultation and authorization processes To discuss the requirements for authorization and the school's progress towards meeting them	Head of School/ pedagogical leadership team	
8.45am–9.45am	To respond to questions regarding the consultation and authorization processes To discuss the requirements for authorization and the school's progress towards meeting them	CP coordinator	
9.45am–10.00am	Break		
10.00am–10.45am	To respond to questions regarding the consultation and authorization processes To discuss the requirements for authorization and the school's progress towards meeting them	CP coordinator and any other member of staff who will be involved in the topics to be discussed	
10.45am–11.45am	To discuss the achievements and challenges in preparing for the implementation of the programme Development of the learner profile Approaches to learning integration Reflective project (RP) planning Integration of personal and professional skills (PPS) Contribution to service learning Collaborative planning Career-related studies (CRS) and the connection to the DP courses Implementation of language development Any other topic relevant to the CP team	All CP and relevant DP faculty	
11.45am–12.30pm	To discuss the achievements and challenges in preparing for the implementation of the programme	PPS teacher(s)	

Approximate time	Objective(s)	Who	Venue
12.30pm–1.30pm	Lunch		
1.30pm–2.15pm	To discuss the achievements and challenges in preparing for the implementation of the programme	DP teacher(s) (studies in language and literature, and language acquisition) Language development teacher(s)	
2.15pm–3.00pm	To discuss the achievements and challenges in preparing for the implementation of the programme	DP teacher(s) (individuals and societies, and the arts)	
3.00pm–3.45pm	To discuss the achievements and challenges in preparing for the implementation of the programme	DP teacher(s) (sciences and mathematics)	

Approximate time	Objective(s)	Who	Venue

CP consultation visit: Day 2

Approximate time	Objective(s)	Who	Venue
8.00am–8.45am	To discuss the achievements and challenges in preparing for the implementation of the programme To visit the school library/media centre/laboratories	Librarian(s)/laboratory assistant(s)	
8.45am–9.45am	To visit the school facilities	CP teachers/students	
9.45am–10.30am	To discuss the impact of the programme on learning and teaching	Prospective CP students	
10.30am–11.15am	To discuss the achievements and challenges in preparing for the implementation of the programme	Service learning coordinator	
11.15am–11.30am	Break		
11.30am–12.15pm	Classroom observations	Teachers, relevant staff and students in visited classes	
12.15pm–1.00pm	To discuss the advice to be given to students in terms of the programme and post-secondary educational options	Counsellor/CP coordinator	
1.00pm–2.00pm	Lunch		
2.00pm–2.45pm	To discuss the impact of the programme implementation on students and the school community	Legal guardian(s)	
2.45pm–3.30pm	To discuss the achievements and challenges in preparing for the implementation of the programme	Representatives of the CRS provider(s) and CRS teacher(s)	
3.30pm–4.15pm	To discuss the achievements and challenges in preparing for the implementation of the programme	RP coordinator/ supervisor(s)	
4.15pm–5.15pm	What is next in the authorization process? To discuss the findings, review the action plan and determine a possible course of action	Head of School/ pedagogical leadership team and CP coordinator	