



CHARTER SCHOOL SITE VISIT PROTOCOL

2022-23

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INTRODUCTION

In conducting site visits, the Santa Clara County Office of Education's (SCCOE) Charter Schools Department (Department) is carrying out the requirements of California Education Code (EC) Section 47604.32(a)(2) which requires chartering authorities to visit each charter school under its authority at least annually. Such visits provide the charter authorizer information and insight into the charter school's operations. The annual visit also assists in ensuring each charter school authorized by the Santa Clara County Board of Education (SCCBOE) complies with all reports required of charter schools by law, including the Local Control and Accountability Plan and the Annual Update, pursuant to EC Section 47606.5. The visit additionally aids in monitoring the fiscal condition of each charter school under the authority of the SCCBOE. Moreover, conducting site visits is one way in which the SCCOE's Charter Schools Department fulfills its ongoing duty to oversee charter schools authorized by the SCCBOE. The report generated from each site visit is one component in the body of evidence reviewed during the consideration of the charter school's request for renewal.

Site visits take place at least once a year and may be conducted at additional times when deemed necessary by the Department. Site visits vary in length depending on the size, location, and/or specific conditions of a particular school. They are one means by which the Department documents each charter school's performance and progress over time, corroborating and augmenting the information reported each year in the school's Annual Visit Oversight Report.

The purpose of a site visit is to gather and document evidence about a charter school's performance. Evidence gathered during the site visit process is ultimately used to make a renewal determination or inform other authorizing actions pertaining to the school. Site visits and subsequent site visit reports are not intended to provide specific technical assistance or other advice to the school. The site visit is also not intended to directly assist schools in making decisions about how to improve academic programs or operations.

The protocol herein is designed to be a resource for charter school leaders and Department staff. It articulates the types of visits conducted, site visit processes utilized, the roles and responsibilities of all parties, and expected outcomes. This Protocol is meant to provide useful information about site visits so participants know what to expect and how to prepare. Familiarity with the Protocol helps site visits run smoothly. At the end of the document, in Appendix A: Site Visit Checklist for School Leaders/Designees, is a checklist to assist schools in preparing for the site visit.

SCHEDULING THE SITE VISIT DATE(S)

The Department typically conducts site visits between October and May. At the end of the prior school year, the Department informs schools of the required annual documents that must be submitted for review. In August and September, the Department surveys schools to gather input regarding site visit dates and develops a tentative calendar. The school will then be asked for feedback on the planned visit date(s). If the suggested date(s) are not feasible, the Department works with the school to find mutually convenient alternate date(s) for the visit. Once the date(s) have been confirmed by the school, they may not be changed, barring an emergency. If the school needs to change the date(s), the school must contact the Department as soon as possible. The Department has a limited number of available visit dates and may not be able to accommodate requests for changes. Once the school leader confirms the date(s) of the site visit, they should relay that information to all relevant educational partners and ensure that the date(s) selected have regular programming. **No early release, testing, field trips, or other events outside of the normal academic program should be conducted on the day(s) of the visit.**

PRE-VISIT PLANNING AND PREPARATION

The Department's site visit leader is typically the Administrator, Charter Schools Department. This person is generally responsible for all communication with the school, including requesting documents from the school, developing a schedule for the visit in consultation with the school leader or designee, and assembling site visit materials for team members. During the visit, the school's primary contact at the Department will be responsible for orienting team members to the visit, leading the visit, and co-authoring the resulting site visit report. Site visit teams include a minimum of two Department staff.

Planning for the site visit begins in earnest approximately seven weeks before the visit when the Department's site visit leader sends the school an email that outlines:

- The scope of the visit (See *Appendix C: Types of Visits* for more information.)
- The focus groups to be included in the visit (See *Appendix F: Focus Groups* for a complete list of the focus groups that may be conducted during a site visit.)

The site visit leader will also prompt the school administrator or designee to provide information that is used to create a draft of the schedule for the visit. (See *Appendix C: Types of Visits* for more information)

The Department assumes the school administrator will act as the school coordinator and liaison for site visits; however, the school has the option of designating another person to assume this role. Should a designee be assigned, the Department assumes that the designee will communicate all relevant information back to the school's administrator and educational partners. The school coordinator should be knowledgeable about the school's schedule and programming, able to communicate quickly with various educational partners, and must work with colleagues to resolve any scheduling issues. The site visit leader works with the school coordinator to ensure that key documents are provided electronically to the site visit team at least 10 business days before the visit. Additional tasks for the school coordinator include developing the site visit schedule, organizing the appropriate educational partners for focus groups, and coordinating logistics. For additional guidance on preparing for the site visit, please see *Appendix A: Site Visit Checklist for School Leaders/Designees*.

SITE VISIT COMPONENTS

The table below summarizes each of the typical components of the site visit included in the site visit schedule. In addition, the schedule should enable the site visit team to observe all aspects of the school's program, including, for example, mission-related activities. Sample schedules for a one- or two-day site visit are contained in *Appendix E: Sample Schedules*.

Component	Description
Orientation meeting with school lead(s)	The site visit team meets with the school lead(s) for the purpose of making introductions, confirming the logistical details of the visit, reviewing academic data, and discussing student progress. The site visit team may request additional meetings with the school leaders during the visit as needed.
Classroom observations	The site visit schedule should include enough classroom observations to ensure coverage of a sampling of all grades and core subjects. The site visit team should observe all types of classrooms: general education, special education, and integrated and designated English Language Development (ELD) instruction. While on-site, the site visit team should be free to access all classrooms without advance notice to the school or the teachers. The length of classroom observations depends on the scope of the visit, with observations ranging from 10 to 15 minutes.
Focus groups/interviews	<p>A few focus groups must be scheduled for the site visit. It is the school's responsibility to gather a representative group from each relevant category through an open invitation and to inform each participant of the time and place of the meeting. The Department expects each participant to have complete freedom to speak regarding their knowledge of and experience at the school, with no limits or repercussions imposed.</p> <p>See <i>Appendix F: Focus Groups</i> for a complete list of the focus groups that may be interviewed during the site visit.</p> <p>Prior to the visit, the site visit leader will discuss the composition of focus groups with the school coordinator to ensure focus group membership does not overlap and appropriate representation will be present.</p> <p>Given time constraints, multiple focus groups within the same category of educational partner group cannot be accommodated unless the school has multiple campuses. For a school with multiple campuses, the site visit team typically only conducts one focus group with administrators but may conduct focus groups with students, teachers, and parents at each campus .</p>
Site Visit Team time/ team moderation	The site visit schedule should include blocks of time during which the site visit team reviews documents, conducts additional classroom and school observations, records and discusses observations, data and other evidence, identifies issues for further review, and develops preliminary findings The site visit team will require a private space for these purposes.
Exit meeting with school lead(s)	The site visit concludes with an exit meeting with the school leader(s). This meeting provides SCCOE with an opportunity to obtain clarification about any outstanding questions or issues and to thank the school leader for the assistance provided during the site visit. Finally, SCCOE will describe the next steps in the site visit process.

AFTER THE SITE VISIT

After the site visit, the SCCOE Charter Schools Department prepares a written report that summarizes the evidence gathered for each of the criteria and key indicators included within the scope of the visit. Reports are typically issued approximately eight weeks following the site visit.

The site visit report becomes a permanent part of the school's record. The site visit report and all related materials become a part of the body of evidence that the Santa Clara County Board of Education will consider when the school enters the renewal process.

APPENDIX A: SITE VISIT CHECKLIST FOR SCHOOL LEADERS/DESIGNEES

The school leader or designee should use the following checklist to prepare for oversight visits.

AS SOON AS YOU RECEIVE THE INITIAL SCHEDULING EMAIL

- Review carefully the email from the Department that outlines the scope of the review process and the documents the school needs to provide to the Department via Monday.com.
- Check that the suggested site visit date(s) are on a regular school day without any field trips, early release, or school-wide testing.
- Complete the site visit input survey.
- Submit all required documents electronically within 10 business days of the visit. It is important for schools to submit all the requested documents in a timely manner and for schools to use the file-naming conventions included in *Appendix D: Site Visit Documents*. This will facilitate the site visit team's task of reviewing the documents.

IMMEDIATELY UPON RECEIVING YOUR SITE VISIT DATE

- Email confirmation of the proposed site visit date. If the date(s) create undue hardship for your school, contact the Department site visit leader (e.g., Administrator, Charter Schools Department) to find mutually agreeable alternate date(s).
- Share the site visit date(s) and this Site Visit Protocol with all relevant educational partners once the date(s) are confirmed.

APPROXIMATELY SEVEN WEEKS PRIOR TO THE VISIT

- Review this Site Visit Protocol and share it with the school community.
- Talk with the school's Board of Directors, staff, and community to orient them to the purpose of the site visit, their respective roles during the visit, and what to expect when the team visits. Inform teachers that classroom observations will be part of the visit; however, assure them the purpose of the observations is to collect evidence and capture schoolwide trends, not evaluate individual teachers. Ask teachers to avoid administering tests or quizzes on the day(s) of the site visit so that site visitors may observe instruction.
- Begin identifying focus group participants. As noted in *Appendix F: Focus Groups*, if a quorum of the Board of Directors or a quorum of any subcommittee of the Board is present at the interview, the interview falls within the scope of the Brown Act, and the board should plan to conduct the meeting accordingly.

APPENDIX A: SITE VISIT CHECKLIST FOR SCHOOL LEADERS/DESIGNEES

APPROXIMATELY THREE WEEKS PRIOR TO THE VISIT

- Begin assembling a representative group for each focus group through an open invitation. See *Appendix F: Focus Groups* for further instructions.
- Identify private locations for conducting each focus group and, if feasible, a separate private location where the site visit team may work throughout the day.
- Work with the site visit leader and the school community, including the Board of Directors, to determine the schedule for the visit. This may take several iterations to complete. The schedule needs to be finalized with the site visit leader at least one week prior to the visit.

TWO WEEKS PRIOR TO THE VISIT

- Confirm participants for focus groups.
- Arrange coverage (as needed) for school staff members who participate in focus groups.
- Complete the Focus Group Attendees template and send it to the site visit leader.
- Submit all required documentation to the Department via Monday.com, using the file-naming convention in Appendix D.

THE DAY BEFORE THE SITE VISIT

- Distribute the site visit schedule to the school community.
- Determine who will attend the site visit team's exit meeting with the school leader. Invite those individuals to attend. (Please note: Only the school leader is required. If additional staff members attend, it is typically not more than one or two.)

DURING THE VISIT

- Ensure the team's meeting room remains private and any additional requested documents are provided and clearly labeled.
- Ensure rooms where focus groups are conducted remain private.
- Ensure all focus group attendees (especially students and family members) are present for the start of each focus group.
- Be available to the site visit team for a morning orientation, a focus group, and any necessary follow-up. Assist the team in obtaining any additional information, documents, data, or interviews with school staff.
- Bring concerns and questions to the attention of the site visit leader as they arise.
- Attend an exit meeting with the site visit team to hear the team's preliminary findings and next steps in the site visit process.

AFTER THE VISIT

- Share the final, public site visit report with staff, families, Board members, and other members of the school community.

APPENDIX B: SCOPE OF SITE VISIT

SCCOE Charter Schools Department team gathers and analyzes evidence in the five areas that an authorizer may use as a foundation for its site visits:

- **Educational Program:** Overview of the educational program, English learner and special education services, curricular materials, professional development, teacher credentials and staffing, and assessment and use of data.
- **Facilities:** Condition/appearances, adequacy, and compliance with standards.
- **Fiscal:** Systems associated with attendance, record-keeping, annual audit, budget, interim reports, and financial statements.
- **School Operations:** Training, handbooks, admissions, discipline, health and safety, parent notifications, and policies.
- **Governance:** Board management and meetings, policy development, and educational partner involvement.

APPENDIX C: TYPES OF VISITS

The information below includes details specific to the Annual Site Visit.

ANNUAL REVIEW SITE VISIT

Annual Review Site Visit	
Purpose	This visit is designed to gather evidence regarding the school's implementation of its charter and how it is performing on an annual basis.
Length	One day
Site visit team composition	Charter Schools Department fiscal and program staff
Documents to be submitted by the school	See <i>Appendix D: Site Visit Documents</i> for a list of the documents to be submitted to the Department at least 10 business days prior to the visit. The site visit leader may request additional documents depending on the scope of the visit.
Required focus groups	<ul style="list-style-type: none"> • School Leaders/Administrators (including Special Education and ELD Administrators) • Teachers (including General Education Teachers and Special Education/ ELD Staff) • Families (including parents/guardians of students identified as EL and SpEd) • Students • Charter Management Organization (CMO)/School Fiscal Team • Others, as determined by the site visit leader
Product	Annual Review Report that includes findings, and evidence related to the following: <ul style="list-style-type: none"> • Governance • School Operations, Management, and Human Resources • Instruction and Student Performance • Financial Reporting and Enrollment • Facilities

APPENDIX C: TYPES OF VISITS

The school administrator will receive an email with instructions on how to prepare for the site visit. The email will include the table below, with guidelines to establish preferred times for Annual Review Site Visit elements.

Annual Visit Site Visit Scheduling Guidelines			
Please enter into the table below the times at which you would like to schedule the components of the site visit. Do not schedule multiple focus groups at the same time.			
Site Visit Component	Time Required	Time Scheduled	Location
Orientation Meeting with School Lead(s) (including Special Education and ELD Administrators)	60 minutes		
Teacher Focus Group (including Special Education and ELD Staff)	60 minutes		
Family Focus Group (including parents/guardians of students identified as SpEd and ELD)	60 minutes		
Student Focus Group (representing a cross-section of the student body in grade 3 and above)	30 minutes		
Charter Schools Team Debrief	20 minutes		
Exit Meeting with School Lead(s)	60 minutes		

See *Appendix G: Site Visits at Schools with Multiple Campuses and Schools in a Network* for more information about planning and executing multi-campus site visits.

APPENDIX C: TYPES OF VISITS

CHARTER RENEWAL SITE VISIT

Charter Renewal Site Visit	
Purpose	This visit is designed to gather evidence regarding the school's implementation of its charter and how it has performed during the charter term.
Length	One to two days
Site visit team composition	Charter Schools Department fiscal and program staff
Documents to be submitted by the school	See <i>Appendix D: Site Visit Documents</i> for a list of the documents to be submitted to the Department at least 10 business days prior to the visit. The site visit leader may request additional documents depending on the scope of the visit.
Required focus groups	<ul style="list-style-type: none"> • Members of the Board of Directors (avoid a quorum) • School Leaders/Administrators (including Special Education/ELD Administrators) • Teachers (including General Education Teachers and Special Education/ELD Staff) • Families (including parents/guardians of students identified as EL and SpEd) • Students • Charter Management Organization (CMO)/School Fiscal Team • Others, as determined by the site visit team leader
Product	<p>Staff Analysis and Proposed Finding of Fact Report, including findings, and evidence related to the following:</p> <ul style="list-style-type: none"> • Procedural Status • Criteria for Renewal of a Charter Petition • Determination of Criteria for Renewal <ul style="list-style-type: none"> ▪ School Academics (CAASPP, ELPAC, CA School Dashboard and/or verified data) • Review of the Charter Petition <ul style="list-style-type: none"> ▪ Sound Educational Program ▪ Ability to successfully implement the program set forth in the Petition ▪ Affirmation of each of the conditions required by statute ▪ Reasonably comprehensive description of the required elements ▪ Exclusive Public Employer ▪ Requirements for Grade-Levels Served, Facility Location, and Students Served ▪ Any other Criteria Set Forth in the Statute

APPENDIX C: TYPES OF VISITS

When the site visit team coordinator sends the school coordinator an email with instructions on how to prepare for the site visit, the email will include the table below, along with guidelines to establish preferred times for the Charter Renewal Site Visit elements.

Full Criteria Site Visit Scheduling Guidelines				
Please enter into the table below the times at which you would like to schedule the components of the site visit. Do not schedule multiple focus groups at the same time.				
Group	Time Needed	Time Scheduled	Location	Date
Orientation with School Lead(s) (including Special Education and ELD Administrators)	60 minutes	Just after beginning of school day		
Members, Board of Directors (avoid a quorum)	60 minutes			
Fiscal Team (including Accounting & Finance Staff)	60 minutes			
Network Administrators (if applicable)	60 minutes			
Teachers (including representatives from Special Education, ELD, and electives Staff)	60 minutes			
Families (including parents/guardians of students identified as SpEd and ELD)	60 minutes			
Students (representing a cross-section of the student body)	30 minutes			
Site Visit Team Debrief	20 minutes			
Exit Meeting with School Lead(s)	60 minutes			

See *Appendix G: Site Visits at Schools with Multiple Campuses and Schools in a Network* for more information about planning and executing multi-campus site visits.

APPENDIX D: SITE VISIT DOCUMENTS

Documents schools **may** be asked to provide for the site visit are listed and described in this appendix. Schools will be provided with a list of the **specific** documents required and the timeline for submitting them. All documents submitted before the visit must be submitted electronically via Monday.com. It is important for schools to submit all the requested documents in a timely manner and to use the file-naming conventions provided for each document. This will facilitate the site visit team’s document review.

Required Document Naming Convention [SI] = School Initials Example: ABC_Directions	Description
[SI] Master Class Schedule	An easily readable <i>and</i> easily printable master class schedule for the day of the visit that clearly indicates the following for all classes: <ul style="list-style-type: none"> • Teacher • Subject • Time • Location (room assignments) • Please identify on the schedule which classes are ELD and special education pullout or substantially separate placements and where they will be located.
[SI] Preferred Schedule	The school’s preferred times for site visit components. See <i>Appendix C: Types of Visits</i> .
[SI] List of Focus Group Attendees	Using the template provided by the Department, please submit a list of focus group attendees . Focus groups (including student and family focus groups) should be assembled using a process that begins with an open invitation. Focus groups should include fewer than 10 participants, consist of a range of participants, and, except for the school leaders/administrators focus group, supervisors should not be in the same groups as supervisees.
[SI] Recruitment Materials	Current recruitment materials , including the school’s application for admission and any school brochures/flyers used to recruit applicants. Please also provide samples of recruitment materials translated into other languages.
[SI] Translated Documents	List of school documents and/or forms available in languages other than English . The site visit team may also ask to see copies of the translated documents.
[SI] Staff Roster	A copy of the school’s staff roster that includes each certificated and non-certificated staff member’s name, job title, and assignment or role. In addition, clearly indicate the following on the roster: <ul style="list-style-type: none"> • Staff members who have been at the school one year or less • Staff members who provide English Language Development services • Staff members who provide special education services • Vacant positions Department staff will follow up with the school as needed either before or after the site visit to gather further information about staff qualifications.

APPENDIX D: SITE VISIT DOCUMENTS

Required Document Naming Convention [SI] = School Initials Example: ABC_Directions	Description
[SI] Supports for All Learners	Using a template provided by the department, please describe the school's system of support for all learners , including: <ul style="list-style-type: none"> • a list of assessments used to identify students' strengths and needs for academic, behavioral, and social-emotional development • a list of supports provided to all students • a list of interventions administered to students based on the outcome of an assessment (organized by tier, if the school uses a tiered system) • a list of resources used to support all learners (staff, curricula, technology)
[SI] Other	Any other materials that the school believes will assist the team in efficiently reviewing the school's performance under its charter, including, but not limited to materials documenting the school's efforts to work toward the elimination of persistent achievement, access, and opportunity gaps experienced by historically underserved students.

APPENDIX E: SAMPLE SCHEDULES

This appendix includes sample schedules for the site visit team's work at the school. The schedules illustrate the types of activities that occur during a typical site visit. The actual schedule will be developed by the site visit leader in consultation with the school coordinator. Fiscal team meetings will be scheduled virtually at a time that is mutually acceptable to the Department and the school's fiscal team.

As indicated in *Appendix F: Focus Groups*, focus groups are typically an hour in length, but the site visit leader may schedule longer or shorter meetings depending on several factors. For example, focus groups with school leaders/administrators may be extended to 90 minutes, while 30 minutes or 45 minutes may be enough for some focus groups. The site visit leader will review the questions for each focus group and determine an appropriate amount of time.

ANNUAL SITE VISIT

Time	Activity
8:00-9:00	Meeting with School Lead(s)
9:00-10:30	Classroom Observations
10:30-11:00	Student Focus Group
11:00-12:00	Cumulative/Special Education/Personnel File Review
12:00-1:30	Lunch and Travel
1:30-2:30	Family Focus Group
2:30-3:30	Teacher Focus Group (including Special Education and ELD Teachers)
3:30-3:50	Charter Schools Department Team Reflection
3:50-4:50	Exit Discussion with School Lead(s)

* The Charter Schools Department will work with individual charter schools housed across multiple sites to develop a multi-day schedule as needed on a case-by-case basis.

** Annual Fiscal Meetings are held virtually and will be scheduled for a time mutually acceptable to the Charter Schools Department and the school's fiscal team.

APPENDIX E: SAMPLE SCHEDULES

CHARTER RENEWAL SITE VISIT

Time	Activity
8:00-9:00	Orientation Meeting with School Lead(s)
9:00-10:30	Classroom Observations
10:30-11:00	Student Focus Group
11:00-12:00	Cumulative/Special Education/Personnel File Review
12:00-1:30	Lunch and Travel
1:30-2:30	Family Focus Group
2:30-3:30	Teacher Focus Group (including Special Education and ELD Teachers)
3:30-3:50	Site Visit Team Reflection
3:50-4:50	Exit Meeting with School Lead(s)

* Annual Fiscal Meetings are held virtually and will be scheduled for a time mutually acceptable to the Charter Schools Department and the school's fiscal team.

APPENDIX F: FOCUS GROUPS

Several focus groups must be scheduled for the site visit. Following is a complete list of the focus groups that *may* be conducted during the site visit. When the Department notifies each school of the scope of the site visit, the school is provided with a list of the *specific* focus groups that will be held.

It is the school's responsibility to gather a representative group from each category through an open invitation and to inform each participant of the time and place of the meeting. Focus group composition **should include a maximum of 10 individuals**. *Please note: educational partners other than those identified in these focus groups, such as external educational partners or school partners, will **not** be interviewed.*

Focus groups are typically an hour in length but may be longer or shorter depending on questions for the group or school, and may require only 30 minutes or 45 minutes.

The Department expects each participant is present for the entirety of the meeting and is given complete freedom to speak regarding their knowledge of and experience at the school, with no limits or repercussions imposed.

Focus Groups	Description
Board of Directors	This meeting is typically scheduled in the morning in order to work around the schedules of the school's trustees. The school leader, even if they serve on the board, may not attend this meeting. Please note that if a quorum of the Board of Directors or a quorum of any subcommittee of the Board is present, the meeting falls within the scope of the Brown Act, and the board should conduct the meeting accordingly.
Network Administrators (if applicable)	If the school is part of a network or has multiple campuses, the site visit schedule will include an interview with administrators whose responsibilities span the network/multiple campuses. Administrators responsible for the academic program and operation of the network/multiple campuses should attend this meeting.
School Leaders/ Administrators	Administrators who are directly and primarily responsible for the academic program and the operation of the school should attend this meeting. During the visit, the team may request additional meeting times with one or more administrators for additional inquiry or clarification.
Fiscal Team	Fiscal Team focus group should include the key accounting and finance team members responsible for overseeing and monitoring school budget, spending, financial obligation, operations, implementing financial policies and procedures, and determining facilities/lease agreements.

APPENDIX F: FOCUS GROUPS

Focus Groups	Description
Teachers (General and Special Education)	<p>All teachers should be offered the opportunity to participate. The focus group must include teachers of English language arts, mathematics, ELD, and special education, as well as teachers of courses specifically associated with the school's mission and/or key design elements.</p> <p>The focus group should contain a representative sample of teachers in terms of their experience, years at the school, subject, and grade level. This focus group should additionally reflect the demographic composition of teachers employed by the school.</p> <p><i>Administrators and/or teachers who are directly responsible for supervising/evaluating other teachers in the focus group may not be present at this meeting.</i></p>
Students	<p>Student focus groups should include students in Grade 3 and above. All students should be offered the opportunity to participate. The focus group should represent a variety of ages, grade levels, abilities, and time spent at the school. This focus group should also reflect the demographic composition of the student body.</p> <p><i>School staff may not be present at this meeting.</i></p>
Families	<p>All families should be offered the opportunity to participate. This focus group should include parents or guardians of children who represent a variety of ages, grade levels, time spent at the school, and abilities, including students with disabilities and students who are English learners.</p> <p><i>School staff and parent board members may not be present at this meeting.</i></p>

APPENDIX G: SITE VISITS AT SCHOOLS WITH MULTIPLE CAMPUSES AND SCHOOLS IN A CHARTER NETWORK

Several charter schools operate multiple campuses with separate administrative leadership teams and programs in different locations. In some cases, the campuses serve overlapping grade levels, and in other instances, campuses serve an elementary, middle, and/or high school with distinct separations of program and leadership. In addition, there are several charter school boards of directors that hold charters for more than one school (a “network”), but utilize a centralized administrative leadership structure to oversee each school. The legal structure for these various configurations differs depending on the particular circumstances.

To the extent possible, the Charter Schools Department will endeavor to schedule and coordinate site visits in the most efficient manner possible. In addition, the Charter Schools Department may also issue a single site visit report in these cases. To ensure the necessary evidence is gathered to make appropriate accountability determinations, it is important the site visit team gather evidence at each individual campus. This will allow the team to paint a clear and accurate picture of the performance of each campus/school.

RESPONSIBILITIES OF THE SCCOE OVERSIGHT TEAM

- During the planning process, the site visit leader will seek confirmation from the school leader (or designee) that information about the site visit process is being communicated to school community members at all campuses/schools.
- The site visit team is responsible for gathering evidence from all campuses/schools. At least two team members will visit each campus/school for the purposes of conducting focus groups and classroom observations.
- Planning the number of focus groups for a site visit at a school with multiple campuses will need to take into account the number of campuses, the distance between campuses, and the number of members on the site visit team. The site visit team will conduct only one focus group with Board members and one focus group with administrators whose responsibilities span multiple campuses. The site visit team will hold a focus group with campus administrators, teachers, and students at each campus.
- The site visit team will conduct enough classroom observations at each campus/school to ensure coverage of a sampling of all grades and core subjects. The site visit team will observe all types of classrooms: general education, special education, and English Language Development (ELD).
- In the site visit report, the Charter Schools Department will provide specific evidence from each campus/school.
- The Charter Schools Department’s fiscal team will contact the school’s fiscal leads to arrange the annual fiscal meeting.

APPENDIX H: SITE VISIT TEAM CODE OF CONDUCT OR RESPONSIBILITIES AND OBLIGATIONS

SITE VISIT TEAM CODE OF CONDUCT

The site visit team's conduct throughout the site visit process can significantly affect the team's ability to obtain and report information regarding the school's performance; it can also influence perceptions of the school community about the objectivity of the site visit process and report. This Code of Conduct provides guidance for team members in fulfilling their assigned responsibilities. Visiting team members will do the following:

- Review all necessary materials, including this *Protocol* and the documents and information provided in advance of the site visit by the Charter Schools Department and the school.
- Approach the review of a school with a clear understanding of the school's particular mission and educational philosophy.
- Conduct the site visit without personal or professional bias and act accordingly, including disclosing any possible conflicts of interest (e.g., prior relationships with school staff, students, or families).
- Make certain all communications with the school are professional and courteous in tone.
- Ensure site visit apparel is business casual.
- Arrive at the school on time and closely follow the schedule for the day. Inform the school contact immediately of any changes to the agreed-upon schedule.
- Refrain from using cell phones for unrelated tasks during classroom observations, focus groups, and team meetings. Use the lunch break to use cell phones and check email.
- Avoid unnecessary disruptions to school and classroom routines while performing assigned tasks such as classroom observations.
- Refrain from criticizing the work of a teacher or anyone else involved with the school during an observation or focus group.
- Ensure the confidentiality of school information such as student names and personnel information, as appropriate.
- Reject requests to speak "off the record"; all conversations and other evidence gathered during the site visit are considered "on the record."
- Speak as though a member of the school staff were present when speaking with other members of the team about the school and about the evidence gathered during the site visit.
- Refrain from evaluating the performance of individuals, either orally or in written descriptions of the evidence.
- Support findings with evidence. Findings will also clearly identify any areas of moderate or significant concern.
- Treat the draft site visit report, notes, and related evidence as confidential.
- Refrain from discussing the site visit with outside groups or individuals.

RESPONSIBILITIES AND OBLIGATIONS

CHARTER SCHOOL TEAM

1. Charter school will provide private work space where the review team can work free from interruptions, and a space where team members can conduct interviews with focus groups.
2. Identified staff (including principal) should be available throughout the day to work with the review team, as requests come up from time to time.
3. Charter School should have submitted all requested documentation digitally prior to team members arrival.
4. Charter School should have all focus groups identified and scheduled prior to site visit (School leadership team, Teachers, Parents, Governing Board, and Students).
5. Charter School should brief staff members prior to the visit and review site visit expectations.

SCCOE SITE VISIT TEAM

1. Site Visit Team will arrive punctually and work efficiently throughout the review.
2. Site Visit Team will be respectful of the teaching and learning process by limiting disruptions to the learning environment.
3. Department Team will be respectful to focus groups while conducting interviews by respecting both participants' privacy and confidentiality.
4. Department Team will compile data and provide a written report as quickly as is feasible.
5. Department Team will remain flexible, as unexpected situations may arise from time to time.
6. Department Team will be respectful of school property and return all work spaces to their original condition.
7. Department Team will follow up with the charter school if necessary to collect additional information needed to complete the final report.

Acknowledgements

The site visit protocol has been adapted from the [Massachusetts Department of Elementary and Secondary Education's Site Visit Protocol](#) and [Anne Arundel County Public Schools Annual Charter School Site Review](#).