



Missouri
Charter Public School Commission

Site Visit Protocol

**For Initial Five Year Charter Schools &
Schools Requesting Expansion or Replication**

3/13/2017

This charter school site visit protocol is a guide for school leaders and members of the site visit team organized by the Missouri Charter Public School Commission. This protocol is based on the successful charter school program built by the Massachusetts Department of Elementary and Secondary Education. The Commission extends its gratitude to MA DOE for the use of its materials.

Overview

This Protocol is designed to be a resource for charter school leaders, external site visitors, the Commission staff, and contracted vendors who may conduct site visits for the Commission. It explains site visit processes, roles and responsibilities of all parties, and expected outcomes. The Protocol is meant to provide useful information about site visits so stakeholders and visitors know what to expect and how to prepare.

The purpose of a site visit is to review three components of the charter school: Faithfulness to the Charter, Academic Progress and Organizational Viability. Site visits vary in length depending on the size, location, age, and/or specific conditions of a particular school. Site visits take place prior to opening, shortly after opening, in the Spring of the first through third years and may be conducted at additional times when deemed necessary by the Commission. An additional and more extensive multi-day site visit will occur at the beginning of the fourth year. Data and information collected from site visits, as well as what is collected throughout the years of the charter, will be used by the Commission to determine if the charter will be renewed, placed on probation or closed.

While site visits will lead to decisions about renewal, it is important to know that accountability decisions may be required prior to renewal processes, if evidence points to deficits in the school's performance. These decisions may include the imposition of conditions, probation, or revocation in the most serious circumstances.

Site visits and subsequent site visit reports are not intended to provide 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.

Site Visit Members' Code of Conduct

Carry out work with integrity

- Treat all those you meet with courtesy and sensitivity and try to minimize stress.
- Try to allay anxiety by displaying respect, valuing opinions, and showing an interest in what each individual says.
- Focus your attention and questions on topics that will reveal how well students are learning.
- Assure confidentiality.
- Approach the review of a school with a clear understanding of that school's particular mission and educational philosophy.

Act with the best interests of student and staff in mind

- Do not put students or staff in a position where they may have conflicting loyalties.
- Emphasize that students come first and are at the center of the review.
- Wherever possible, work to others' convenience.
- Under no circumstances criticize the work of a teacher, or anyone else involved with the school during the course of an observation period or focus group.
- Observation comments regarding individual teachers are not shared outside the team.

Be objective, base findings on evidence.

- Findings must be robust, fully supported by evidence, defensible, and must inform the guiding questions.
- Findings must be reliable in that others would make the same judgment based on the same evidence.
- Findings must be based on evidence gathered in the context of the school, not in comparison to personal preference or opinion.
- An individual's perception can be evidence, especially if supported by others' observations.
- Be prepared to ask questions to establish whether a view is based on opinion or evidence. This applies to team members' judgments as well.
- Discussion with staff and team members is part of the process to create a fair and secure evidence base from which findings are developed.

Exercise Professionalism

- Arrive to the school early/on-time and closely follow the schedule for the day.
- Site visit attire must be business casual. Refrain from wearing jeans or any other casual-wear.
- Out of respect to the speaker, do not engage in side conversations while another team member or school staff is speaking.
- Refrain from using your cell phone during classroom observations, focus groups, and team time. If absolutely required, calls outside of the lunch break can be taken in the private space designed for the team.
- In cases where team members do not agree on a finding/rating, present concrete evidence to support findings and be respectful to others' evidence-based perspectives.
- Allow participant voice to dominate during focus groups. Ask follow-up questions, but do not offer personal opinions or respond directly to participant responses.

Scheduling Visit Dates

The Commission conducts site visits between February and May. Once the school leader confirms the date of the site visit, the school should relay that information to all relevant stakeholders and ensure regular programming will take place. No 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 school leader will act as or designate someone to be the coordinator and liaison for the visit. The visit coordinator should be knowledgeable of the school's schedule, be able to communicate quickly with various stakeholders and work with colleagues to resolve any scheduling issues. The Commission works with the designated person to ensure that key documents submitted through Epicenter are complete approximately four weeks prior to the visit. Additional site visit preparation includes setting the schedule, organizing the appropriate stakeholders for focus groups and coordinating logistics.

There are many actions that the school, the Commission, and site visitors should take to effectively prepare for the site visit.

Commission Preparation

The Commission determines the range of dates for possible site visits, taking into consideration school vacation weeks, MAP testing weeks and the size and location of the school. The Commission contacts the Board chair and school leader with a proposed date for the visit. If the suggested date is not feasible, the Commission will work with the school to find a mutually convenient alternate date for the visit. Once the date has been confirmed by the school, the Commission considers it finalized, barring an emergency.

The team leader for the visit will be the school's liaison from the Commission. This person is responsible for all communication with the school, including scheduling, requesting pre-visit documents from the school, determining a schedule for the visit (in consultation with the school leader or designee), assembling pre-visit materials for the team, preparing the team for the visit, leading the visit, and writing the resulting site visit report.

Site Visit Team Member Preparation

Site visit team members are responsible for reviewing the preparation materials that are sent to them by the Commission. Team members participate in a webinar training led by the Commission, read over the provided materials, arrive at the site visit with an understanding of the background of the school and are prepared to share initial impressions or questions with the team. Team members are required to review and follow the Code of Conduct (see above) during the visit.

School Preparation

Schools should prepare for the site visit prior to the arrival of the site visit team. We ask that schools work quickly after receiving the scheduling letter/email from the Commission to confirm the site visit date and determine who will be the school's primary point of contact with the Commission. The school should also begin to gather contact information and create invitations to be sent to various stakeholder groups who will participate in the focus groups. Submissions to Epicenter should be made current.

Onsite Documents

The school will be asked to provide a number of documents to serve as evidence to support findings. Nearly all documents will be submitted by Epicenter. A list of additional documents can be provided by the Commission four (4) weeks prior to the site visit.

Visit Team Members

All site visit teams are led by a Commission staff member. The team leader facilitates the day and coordinates additional visitors, who may be Commission members, staff and/or external volunteers. External volunteers who participate in site visits bring additional expertise to the team that may include fiscal management, governance, curriculum or instructional experience, or an area specific to a school's mission. All team members are subject to a Family Registry check and must update it annually.

The Day of the Visit

During the site visit, the team's work is guided by the Charter School Performance Criteria and the schools performance contract. Team members conduct focus groups, interviews, conduct a document review, and meet to formulate preliminary findings. In the fourth year, classroom

observations will be included and are informed by the school leader's written description and oral confirmation of the common practices at the school.

At the end of the visit, the team leader shares a brief report-out guided by the performance contract and the site visit review criteria. The team may present concerns to the school leader prior to the wrap up session. **The statements do not include suggestions for improvement or direct the school to change operations or programs.** Following the wrap up session, the school may ask questions about the site visit process and next steps; however the team cannot answer any questions about the evidence or findings at this time. Please note that any analysis presented during the wrap up is preliminary and that not all of the items in the contract will be addressed.

Site Visit Report

The site visit team is charged with gathering evidence and data that show the school's progress toward meeting their performance contract. The team will complete a final report that will include both findings and ratings.

After the visit, the Commission staff prepares a written report that presents the team's ratings, findings, and the supporting evidence. Site visit team members review the report to ensure that it is factually accurate and reflects the collective thoughts of the team. The team leader incorporates the team's corrections and issues a draft report to the school. The school has one week to report factual inaccuracies or other feedback to the Commission or to request a conversation about the findings and/or ratings. These factual corrections are made and a final report is issued to the school. If the school chooses, a response to the site visit report may be submitted in writing to the Commission. This response and the site visit report become a permanent part of the school's record and are posted on the Commission's website. The site visit report and all additional documentation become a part of the body of evidence that the Commission considers when the school enters the renewal process.

Ratings

Rating	Description
Exceeds	The school fully and consistently meets the criterion and is a potential exemplar in this area.
Meets	The school generally meets the criterion and/or minor concern(s) are noted.
Partially ¹ Meets	The school meets some aspects of the criterion but not others and/or moderate concern(s) are noted.
Falls Far Below	The school falls far below the criterion and/or significant concern(s) are noted.

¹ Due to the developmental nature of establishing a high-performing charter school, it is not unusual for schools in their first charter term to receive Partially Meets for certain criteria.

Performance Criteria

FAITHFULNESS TO CHARTER
<p>Mission and Key Design Elements: The school is faithful to its mission, implements the key design elements outlined in its charter, and substantially meets its performance contract goals.</p> <ul style="list-style-type: none">• operations are in alignment with its mission as stated in its charter• all stakeholders share a common and consistent understanding of the school's mission and educational plan as outlined in the charter.• school fully implemented the educational plan in the approved charter
<p>Access and Equity: The school ensures program access and equity for all students eligible to attend the school.</p> <ul style="list-style-type: none">• student recruitment and retention plan includes and deploys deliberate, specific strategies to ensure the ongoing provision of equity before, during, and after enrollments• if student populations are not comparable to district student populations, the school eliminates barriers to program access• information regarding non-discriminatory enrollment practices and the availability of specialized services are readily available to parents, students, and the general public
<p>Compliance: The school compiles a record of compliance with the terms of its charter and applicable state and federal laws and regulations.</p> <ul style="list-style-type: none">• per Epicenter and DESE
<p>Dissemination: The school provides public schools (district and charter) in the region with access to best/promising practices and/or school's innovation.</p>
STUDENT ACADEMIC SUCCESS
<p>Student Performance: The school consistently meets academic growth, proficiency, and college and career readiness</p> <ul style="list-style-type: none">• performance standards articulated in performance contract and/or• Missouri student performance standards

Education Program Delivery: The school delivers a high quality academic program that meets the academic needs of all students.

Curriculum:

- aligned to Missouri Learning Standards
- regularly reviewed and revised to ensure quality and effectiveness
- aligned vertically between grades and horizontally across classrooms at the same grade level
- implemented by teachers with fidelity
- accessible to all students, including diverse learners to promote mastery of skills and concepts

Instruction:

- school staff have a common understanding of high quality instruction for all students
- instruction mirror the school's common practices for high quality instruction for all students
- instruction reflect high expectations for all students
- instruction foster student engagement
- classroom environments conducive to learning

Assessment and Program Evaluation:

- school reviews qualitative and quantitative data
- school uses data to improve student outcomes as well as to evaluate the quality /effectiveness of the program in serving all students
- school uses the results of a data-based program of self-evaluation to inform the special education and English language learner programs to improve instructional strategies and ensure that the needs of students are met

Supports for Diverse Learners

- school uses a universal screening system to assess academic and behavioral strengths and challenges of all students and to identify students needing additional support
- intervention system allows students to move along a continuum of services and change placements according to identified progress or needs
- a variety of interventions are used by the school to meet the academic needs of diverse learners, including but not limited to, students with disabilities, gifted students and English language learners
- supports are provided to students, including but not limited to, students with disabilities, gifted students and English language learners, in the classroom and generally
- teachers demonstrate responsibility for the learning of all students, including diverse learners, in the classroom
- resources are allocated to support students with a range of academic needs

School Culture and Family Engagement: The school supports students' social and emotional health in a safe and respectful learning environment that engages families.

Social, Emotional, and Health Needs

- environment is physically and emotionally safe for students
- supports and resources are provided to support students physically, socially, and emotionally
- structures are in place that result in an appropriate learning environment
- formalized procedures identify and support students at risk of dropping out, students in

crisis, and students who require intensive assistance

- school staff identify and coordinate with community services as needed

Family Engagement

- school effectively communicates with families
- school administrators and staff regularly provide families with information on student status and academic progress
- families report satisfaction with the school and have opportunities to engage with the school

ORGANIZATIONAL VIABILITY

Capacity: The school sustains a well-functioning organizational structure and creates a professional working climate for all staff.

School Leadership

- clearly defined and delineated roles, including but not limited to staff and administration, administration and governance, parent and administration are understood by stakeholders
- clear and well-understood systems for decision-making and communication processes among all members of the school community are understood and used by stakeholders
- school leadership team effectively implements a clearly defined mission and set of goals

Professional Climate

- teachers have opportunities for regular and frequent collaboration and professional development
- instructional practices are monitored for consistency
- a formal process of teacher evaluation is developed and implemented

CMO

- board ensures contract with the CMO is appropriately executed
- working relationship between the governing board, school leadership of the school and the CMO
- staff, external partners and parents clearly understand the roles of responsibilities between the board, school leaders, and the CMO

Governance: Members of the governing board act as public agents authorized by the Missouri State Board of Education and provide competent and appropriate governance to ensure the success and sustainability of the school.

- board members are active and engaged in fulfilling their legal responsibilities and obligations to the school including, but not limited to:
 - following Sunshine Laws
 - following the board's bylaws
 - approving appropriate school policies to ensure compliance with requirements
- board demonstrate appropriate oversight of the charter school's leaders, monitor financial conditions, progress towards meeting academic goals, and alignment with the mission while remaining a governing authority Including, but not limited to areas of:
 - hiring, evaluating and removing, if necessary, school leaders
 - maintaining clear and well-understood systems for decision-making and communication processes

- overseeing school's financial condition, academic success, and faithfulness to charter and performance contract
- maintaining governance, rather than management, responsibilities
- board engages in strategic and continuous improvement planning by setting, and regularly monitoring progress relative to goals/priorities that are aligned with the school's mission, vision and core values, including, but not limited to:
 - strategic planning
 - process, procedures and implementation of self-evaluation
 - recruiting, selecting, and training members with needed skills and expertise
 - process, procedures and implementation of CMO evaluation (if applicable)
 - succession planning for board and school leadership

Finance: The school maintains a sound and stable financial condition and operates in a financially sound and publicly accountable manner.

- maintains a 3% fund balance
- completes annual audit
- supplies DESE with the Annual Secretary of the Board Report (ASBR)
- makes available to the public financial and audit reports, including posting to the school's website

Focus Groups & Interviews

A number of focus groups and interviews must be scheduled for the day of the site visit. 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. The Commission expects that 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.

Interviews are with all members of a specific group. Interviews take place with the Governing Board, School Leadership/Administration.

Focus group are samples of the employees, students, parents or community members. All members of the participant groups should be invited to participate. Focus group composition **should not include more than 10 individuals**. School visit coordinator will assure that each focus group contains a representative sample of the participants. Individuals may attend only one focus group session. If the number of parents, stakeholders and/or teachers who volunteer to take part in the focus group greatly outnumber the available seats, the school should contact the Commission to request additional members be added to a specific group or additional focus group times be added to the schedule.

Administrators, CMO and board may not be present at any meeting other than their specific group.

Participants	Description
Governing Board	An interview with all members of the governing board. Remember, a quorum of the board of trustees or any subcommittee of the board falls within the scope of the Missouri Sunshine Law (Chapter 610 of the Missouri State Statutes .) The school leader may not attend this meeting.
School Leadership/ Administration	Administrators who are directly and primarily responsible for the academic program and the operation of the school should attend this meeting. The time reserved for wrap-up may be used to meet with these administrators to clarify issues, concerns, or questions. Schools operated by an CMO may be asked to include a representative as either part of the site visit or make them available for a phone call with the team.
Special Ed./ELL Administrator(s)	The school's special education and ELL program administrators will be interviewed. The time reserved for wrap-up may be used for supplemental meetings with these administrators as needed to clarify issues, concerns, or questions which arise during the course of the visit.
Special Ed./ELL Staff	Special education teachers, interventionists, paraprofessionals, and ESL teachers will be interviewed. The focus group should contain a representative sample of staff in terms of their experience, years at the school, and/or grade level served. Do not include teachers who are directly responsible for supervising/evaluating other teachers.
General Education Teachers	All general education teachers should be offered the opportunity to participate. The focus group should contain a representative sample of teachers in terms of their experience, years at the school, subject, and/or grade level. Do not include teachers who are directly responsible for supervising/evaluating other teachers.
Students	Student focus groups (4 th grade and above) should represent a variety of ages, grade levels, and time spent at the school.
Families	This focus group should include parents or guardians whose children represent a variety of grades, years spent at the school, and, if possible, parents/guardians of students with diverse learning needs.
Student and Family Support Services	This focus group should include student support services staff including but not limited to: family support and outreach staff, guidance and counseling staff, dean of students, social worker, school psychologist, nurse, a crisis management team member, discipline coordinator, and/or community services liaison, if applicable. Please do not include supervisors and supervisees in the focus group together.
External Stakeholders (optional)	This focus group should include external partners and community services delivering services during the school day or in concern with out of school time activities connected to the school's mission.

Checklist for School's Site Visit Coordinator

As soon as you receive the email from the Commission to schedule the site visit:

- Check that the suggested site visit date is a regular school day without any school-wide testing, field trips, or early release.
- Confirm the suggested date(s) as soon as possible. Please email your confirmation. If the date creates undue hardship for your school, call the Commission staff member who sent the email to find a mutually agreeable alternate date.
- Once the date is confirmed, share the site visit date and the Protocol with all relevant school stakeholders.
- Attend the site visit introductory webinar/call provided by the Commission.

Approximately six weeks prior to the visit:

- Review the Site Visit Protocol and share it with the school community.
- Talk with the school's governing board, staff, and community to orient them to the purpose of the site visit, what their respective roles will be during the visit, and what to expect when the team visits. There will be no classroom observations in first-third years. Team members may visit empty classrooms.
- If a quorum of the board of trustees, or a quorum of any subcommittee of the board, is present at the interview, follow all Missouri statutes concerning public meetings.
- Begin the process of assuring all required pre-visit documents are uploaded in Epicenter.

Four weeks prior to the site visit:

- Finalize all pre-visit documents are in Epicenter,
- Invite all families to participate in a focus group on the day of the visit.
- Identify a secure, private space that can serve as a meeting room for the team throughout the day.
- Work with the site visit team leader and the school community, including the governing board of trustees, to determine the schedule for the visit. This may take several iterations to complete. The schedule needs to be finalized with the team leader at least one week prior to the visit.
- Approximately one week prior to the visit:
- Speak with the site visit leader by telephone to review and finalize the site visit schedule, focus group attendees, classroom observation form, as well as discuss logistics and materials. Please ask questions about the site visit and the protocol at this time.
- Confirm focus group participation from board members, teachers, students, families, and staff using the focus group attendees template sent by the team leader. Arrange coverage, if necessary.
- Send the Focus Group Attendees list using the Commission template.
- Begin to assemble the onsite documentation.

One day before the site visit:

- Distribute the site visit schedule to the school community.
- Have each teacher post the schedule for their classroom for the day of the visit on the door of their classroom.

- Determine which stakeholders should attend the team's wrap up at the conclusion of the site visit. Invite those stakeholders to attend.
- Ensure that the onsite materials required are available, organized, and clearly labeled (or in folders) in the team's private meeting space.

During the visit:

- Ensure that the team's meeting room remains private and all requested documents are provided and clearly labeled.
- Ensure that focus group rooms remain private while the interviews are conducted.
- Be available to the 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. Other documents, such as fiscal or planning documents, may be requested during the visit.
- Bring concerns and questions to the attention of the team leader as they arise.
- Attend the report out meeting to hear the team's initial report out.

After the visit:

- Work with the school's leadership team to review and provide factual corrections, or other feedback, on the draft site visit report.
- If deemed necessary, prepare a response to the final report. This response will be appended to the report.
- Share the final, public site visit report with staff, parents, board members, and the school community.

Pre-Visit Documentation

Please make sure that the following documents are submitted to Epicenter 4 weeks prior to site visit.

- A master class schedule for the day of the visit that clearly indicates the following for all classes:
 - o Teacher
 - o Subject
 - o Time
 - o Location (room assignments).
 - o Please identify on the schedule which classes are SEI, ELD and special education inclusion, pullout, or substantially separate placements and where they will be located.
- Current student demographic information. Please use the charts provided on the form below.
- A staff roster that includes administrator and teacher names, number of years of teaching and/or administrative experience, number of years at the school, and subject and/or grade taught or administrative role. Please identify any staff who have ESL or special education licensure.
- Board minutes for each meeting that has occurred in the past 12 months.
- Sample Board committee minutes from the past 12 months (the most recent minutes from each committee meeting).
- Please list and provide summaries and analyses of external assessment data other than MAP

data. Please provide a copy of recent grade level summaries of student results on any standardized test. In addition, if the school has done data analysis on scores from any of these tests, this should be provided as well. Please DO NOT upload raw/student level data.

- A copy of the special education and ELL policies and procedures manuals.
- Please list and provide summaries and analyses of internal assessments, if available. Please provide any additional information the school has aggregated which gives a picture of student achievement. If internal assessments have been created onsite, please provide a brief description of the assessment(s). Please do not provide raw or student level data.

Please have the following documents submitted to the Commission 1 week prior to site visit:

- Please submit the focus group attendees list. Groups should not include more than 10 participants, should include a range of participants, and, with the exception of the administrator focus group, supervisors should not be in the same groups as supervisees.

Please have the following documents ready to be viewed by the team at the day of the site visit:

- A school map, with corresponding teacher room assignments or marked with teacher names and showing the location of special education and ELL instructional spaces (provide one copy for each team member)
- Current recruitment materials, including the school's application for lottery and/or enrollment, and any school brochures/flyers used in recruiting applicants. Please also provide samples of recruitment materials translated in other languages.
- Any other materials that the school believes will assist the team in efficiently reviewing the school's performance under its charter
- Aggregated results of family, teacher, and student survey information
- Samples of educator and administrator evaluation tools
- Professional development calendar/agendas
- Check book, petty cash, student records, IEPs and ELL student records available onsite
- personnel records, available for purchasing systems for inspection.
- Safety Documents
 - o Fire inspection certificate
 - o Building safety inspection
 - o Department of health certificate
- A copy of your school's most recent special education program self-evaluation.
- A copy of your school's most recent English language learner program self-evaluation.
- A copy of your school's Special Ed/ELL/Homeless/Migrant plans.
- Any other documentation that helps to tell the story of your school to an external team of visitors. A strategic plan is an example of a document that a school might provide.

The Commission will identify whether a curriculum review is necessary prior to the visit based on the age of the school, the school's status, and a review of the school's student achievement data. If a curriculum review is required, the school will make curriculum documents available to the Commission through an online platform or via hard copy onsite.