



City of  
**Indianapolis**  
*Greg Ballard, Mayor*

**CHARTER SCHOOL  
SITE VISIT PROTOCOL**  
*for Mayor-sponsored charter schools*

**4<sup>th</sup> Edition**  
**Fall 2005**

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## **Purpose**

A site visit team will visit each of the Mayor-sponsored charter schools twice during the first year of operation, once in late winter and once during the springtime. Visits also will be conducted in subsequent years at the Mayor's Office's discretion. (A multi-day review will be conducted during a school's fourth year of operation; guidance on the multi-day review is forthcoming.) The primary purpose for the site visit is to provide information to the Mayor and to the school related to the schools operations, such as curriculum planning, assessment, staff development, and performance evaluation. Team members will talk with teachers, administrators and parents, visit classrooms, and review documents and materials.

## **Evaluation Questions**

The Mayor's Office has developed the Charter School Performance Framework in order to guide the Office's oversight and evaluation of charter schools. The Framework specifies the expectations the Mayor's Office has for the performance of the schools it charters and guides the information that is gathered and reported through the site visits. The Framework is built around four evaluation questions:

1. Is the educational program a success?
2. Is the organization effective and well-run?
3. Is the school meeting its operations and access obligations?
4. Is the school providing the appropriate conditions for success?

NOTE: The spring site visit will emphasize process (vs. outcomes) in terms of considering whether schools have or are developing processes to achieve their major goals and to meet the terms of their charters.

## **Team Members**

The team will have three members, two representing academics and one representing administration and operations.

## Pre-Site Visit Planning Meeting

- I. Timing:** 3-4 weeks prior to site visit
- II. Present:** Mayor's Office, site visit team leaders, school leadership team (CEO, principal, and others deemed essential by the school)
- III. Purposes:** 1) To provide the school information about the site visit schedule and school tasks, 2) To introduce the team members (if possible), 3) To clarify questions and identify issues for the school
- IV. Materials:** 1) "Site Visit Protocol," 2) Performance Framework and preliminary list of school-specific accountability goals (if applicable), 3) List of team members and contact information, 4) School organization questions (attached), 5) Effective Schools article
- V. Agenda**

### Introductions

#### Site Visit Information

- Purposes
- Date and Schedule (to be negotiated)
- Activities
- School's tasks

#### Questions to help structure the site visit

1. Can the school identify a facilitator for the site visit?
2. Can the school set up a work space and identify space for focus groups?
3. When is the best time to do focus groups for parents, teachers, students and board members?
4. What is the best process for identifying focus group participants?
5. How are administrative responsibilities designated at the school (i.e., how many people and with whom do we need to schedule interviews)?
  - CEO
  - Principal/instructional leadership
  - Business management/financial duties
  - Grade/level and/or curriculum leadership
6. How many classrooms are typically being taught at a given time (or provide a copy of the master schedule)?
7. Are there areas for which the school would like feedback?

#### Questions or other issues

## Overview of Site Visit Schedule

Team Member/ Time	Academic	Academic	Administrator
8:00 – 8:45	Focus group(s) (teachers, parents or students)		Tour of the school
9:15 – 10:15	Meeting w/school leadership		
10:15 – 12:15	Classroom observations: 6-8 visits (15 min. per class)	Interviews: Grade-level leaders or curriculum coordinators	Interviews: A. CEO B. Principal C. Financial/business manager
		1-2 classroom observations	
12:15 – 12:45	Team Meeting/Lunch		
12:45 – 1:45	Focus group: Parents	Focus group: Teachers	Focus group: Teachers
1:45 – 2:15	Fact finding/Follow-up		
2:15 – 2:45	Team meeting		
2:45-3:30	Verbal report on general observations and feedback from schools on site visit		
Date/Time TBD	<u>Board meeting: observation and interview</u>		
	<u>Follow-up to site visit</u> 1. Team leader gives verbal and/or written report to Mayor’s Office 2. Mayor’s Office seeks feedback on process from schools		

### School Tasks:

1. Identify a contact person to facilitate the site visit questions or issues
2. Set up a work space for the team
3. Provide the following information:
  - Copy of school’s master schedule
  - Organizational chart and/or list of staff (names, grades, subjects, e-mail address) and map of the school with teachers, grades and classroom location identified (or numbering system and location and grade of teachers)
  - Copies of written policies and handbooks for teachers, parents, and/or students (have available during the site visit)
4. Have each student bring one sample of work to the student focus groups
5. Set-up a space and identify participants for focus groups (chairs for 6-8 participants per group, flip chart, paper, pens)

### Mayor’s Office Tasks:

1. Provide update of issues related to compliance requirements to team
2. Provide relevant documents to team members: a) charter, b) monthly reports, c) accountability plan, d) annual accountability reports, e) summary of background information on students – number of students and demographics (grades, race/ethnicity, gender, ESE, ESL, other special needs students)
3. Schedule pre-visit and visit with schools and provide packets of information as needed

## Schedule for Site Visit and Relevant Questions

### I. Orientation for Team (Team Leader)

### II. Meeting with School Leadership:

- Overview of site visit (Team Leader) and questions (Team)
- Background information on school – mission, enrollment targets, description of philosophy and curriculum
- Current issues/needs
- Areas in which school would like feedback from team

### III. Tour of the School

- Orientation to grade and classroom organization
- Special function rooms – libraries, resources
- Staff work spaces

### IV. Focus Groups

#### Tips for Interviews and Focus Groups:

- Link evidence and conclusions (keep notes and examples of noteworthy observations)
- Look for situations/comments that re-occur across grades, classrooms, etc. (vs. isolated incidents)
- In focus groups, note the level of consistency on important points – note all, some, few, none

#### Focus Group Questions:

##### Parents:

- Where did your child(ren) attend school last year and why are they attending this school? How is this school different than other schools at which your child has been enrolled?
- Are your expectations for the school being met? Why/why not?
- What is/are your child/ren learning?
- What information is the school providing about your child's learning?
- In what ways are you involved at the school?
- Name one thing that you like and one thing that you dislike about the school.

##### Students:

- Why are you attending this school?
- Where did you attend school last year and how is this school different?
- What are you learning? Or describe a typical class?
- Share your work sample and tell why you selected the one you brought.
- Do you feel safe in this school?
- Name one thing you like and one thing you don't like about the school.

##### Teachers:

- Why are you teaching at this school?
- How is this school different from others in which you have taught (if relevant)?

- What is the mission for the school and is the school achieving its mission?
- What are the primary goals of the school? How well is the school meeting these goals?
- How are curricula decisions made and what steps are taken to implement the decisions?
- What is your greatest academic challenge?
- Do you have any students with “special” needs (e.g., special education, English as a second language, academic, etc)? Do you have the resources you need to meet their needs?
- Do you find that, given the set-up of this facility, the school is conducive to high levels of student learning?
- Describe how the teaching staff interacts with the school administration.
- Name one thing you like and one thing you don’t like about the school.

## V. Classroom Observations

During the spring visit, the site visit team will conduct an academic audit as part of the site visit process. The audit will include 30-minute observations in each class, interviews with all school instructional staff and administrators, and interviews or focus groups with some students and parents.

## VI. Interviews: Grade-Level Leaders and/or Curriculum Specialists

Is the organization effective and well-run? Is the school providing the appropriate conditions for success?

- What is the mission for the school?
- In general are teachers, parents and administration aware of and supportive of the mission of the school?
- Is there an explicit school-wide behavior management system and is it consistently implemented? Is it conducive to student success?
- How are parents involved in this school? Are your goals for parents being achieved?
- Is the school climate conducive to staff success?

Is the academic program a success?

- How do you ensure that students learn Indiana state standards?
- How are curricula decisions made (how often, who is involved, what is the process)?
- Do you think teachers are in general aware of and adequately implementing grade-level curricular goals?
- What is your process for identifying staff development needs? What kinds of staff development have you/will you provide teachers?
- How do teachers collaborate within grades and across grades (e.g., 5<sup>th</sup>, 6<sup>th</sup>)?
- What kinds of autonomy do teachers have in terms of teaching and learning?
- Do teachers have sufficient resources to implement the curriculum?
- What assessment instruments and processes are you using to understand and track student learning in your grade or curricula area?

Is the school meeting its operations and access obligations?

- What and how do you provide information about student learning to parents? To the public?

- What concerns or needs do you have at this time, especially about your grade or curriculum area?
- Is the school facility safe and conducive to learning?
- What process is in place to identify students with “special” needs (e.g., special education, English as a second language, academic, etc.)? Do teachers have the resources they need to meet the needs of these students?

## **VII. Administrator Interviews**

### **CEO:**

#### Is the organization effective and well-run?

- Are Board members, teachers and parents aware of and supportive of the mission of the school?
- How do you select Board members? How do you ensure that the Board members are aware of and meeting the needs of the school?
- How frequently do you interact with Board members? What is the nature of those interactions?
- Is the school meeting its enrollment targets and is there a wait list? Do you have the student population that you targeted or expected?
- How are parents involved in the school?

#### Is the school meeting its operations and access obligations? Is the school providing the appropriate conditions for success?

- Do you have any concerns related to compliance issues (facilities, functioning of the Board, HR {employment contracts, teachers being licensed and teaching in fields for which they are licensed, background checks, etc.)?
- Do you have confidence that the assessments you are using will provide you adequate information related to student learning? Related to achieving the goals of your charter?
- What will you provide and how will you provide information to the public and to parents about student learning and about your school?
- Are you having any challenges related to human resources (for teaching and non-teaching staff)? Are all of your staff members aware of their responsibilities? Do their qualifications match their responsibilities, and do they have the resources they need to effectively complete their responsibilities?
- What concerns or needs do you have at this time?

### **Principal/Instructional Leader:**

#### Is the educational program a success?

- How have teachers been made aware of the school’s educational goals? How are they progressing towards meeting those goals?
- What are your strategies for responding to the ISTEP+ results?

#### Is the school providing the appropriate conditions for success?

- Briefly describe the curriculum and the processes used to make/change curricula decisions? Is there communication between and across classrooms?
- Are you satisfied that the curriculum is being well implemented?
- Are there adequate resources to support curricula goals and individual classroom teacher needs?

- Are you satisfied with the level at which teachers are implementing the curriculum and best practices in the classroom?
- Do you have confidence that the assessments you are using will provide you adequate information related to student learning? Related to achieving the goals of your charter?
- How do you identify and link instructional needs and staff development?
- What professional development opportunities have been/will be provided?
- Are Board members, parents and teachers aware of and supportive of the school's mission?
- What instruments and processes do you have in place to know if all students are learning?
- Is there a school-wide, explicit behavior management system in place? Is it consistently implemented?
- How are parents involved in this school?
- What type of support do you receive from the CEO and the Board?
- Describe your teacher performance evaluation process.

Is the school meeting its operations and access obligations?

- What and how will you provide information to the public and to parents about student learning and about your school?
- What concerns or needs do you have at this time?
- What process(es) are you using and how do you address the needs of "special" students? Does your staff have the resources it needs to effectively address those needs?

**Business Manager/Financial Officer:**

Is the organization effective and well-run? Is the school meeting its operations and access obligations?

- Do you have any concerns related to compliance issues (facilities, functioning of the Board, HR (employment contracts, teachers being licensed and teaching in fields for which they are licensed, background checks, etc.)?)
- Who has responsibility, what processes do you have, and are you satisfied with your processes for: HR, payroll, purchasing, budget, etc?
- What concerns or needs do you have at this time?

VIII. Board Meeting Observation

A member of the site visit team will observe at least one board meeting as close to the time of the site visit as possible. During the meeting, the team member will observe the board's process for decision-making and discussion. In addition, the team member will request an opportunity to ask questions at the end of the meeting as well as offer feedback on his or her observations. The team member's observations and questions at the end of the meeting will address the following questions:

- How often does the board meet and what issues has it considered?
- What decisions has the board made? How does the board document meetings/decisions?
- How do board members know decisions are implemented?

- What are the board's priorities?
- What strengths and concerns do board members express about the school?
- From the perspective of the board, what is the school mission and is it being achieved?
- What is the board's relationship with administration and what do board members perceive the differences in roles and responsibilities to be?
- Do board members have different responsibilities or functions?
- Do you have written policies, handbooks, etc.?

## Reporting Results of the Site Visits

At the conclusion of the winter visit in the school's first year of operation, the site visit team will provide feedback to the school's leadership team. The site visit team leader will provide a similar report to the Mayor's Office.

At the conclusion of the spring visit in the school's first year of operation, the site visit team will provide verbal feedback to the school's leadership team. The site visit team leader will then prepare brief written commendations and areas for attention. For site visits after the first year of operation, the site visit team will provide verbal feedback to the school's leadership team after the conclusion of the site visit. In addition, the site visit team will create a written report based on the team's conclusions. A copy of the report template for schools after their first year of operation follows. The reports will incorporate feedback from the reviewers and an initial draft of the reports will be reviewed by site team members and the principal of the school. A copy of these reports will be shared with the Mayor's Office and with the school leadership team. The reports will be used by the Mayor's Office to monitor school performance and for decision-making, will become part of the school's public record, and will be used by the Mayor's Office for public reporting purposes (including for the annual accountability report).

**Indianapolis Charter Schools  
Site Visit Report**

School \_\_\_\_\_

Date of review \_\_\_\_\_

Expert site visit review team members \_\_\_\_\_

**Commendations and Areas for Attention**

Please note *commendations* and *areas for attention* for each area of the Performance Framework listed below. When appropriate, please provide specific examples to support the observation. If the review team indicates 'none' under a particular area, this indicates that the school is performing satisfactorily in that area

Note: This report will be used to monitor school performance, will become part of the school's public record, and will be used by the Mayor's Office for public reporting purposes (including for the annual accountability report).

**1. Is the educational program a success?**

1.1. Is the school meeting its mission-specific educational goals?

[Site visit team: List mission-specific educational goals here for reference.]

*Commendations:*

*Areas for attention:*

**2. Is the organization effective and well-run?**

2.1. Is the school's board active and competent in its oversight?

*Commendations:*

*Areas for attention:*

2.2. Is there a high level of parent satisfaction?

*Commendations:*

*Areas for attention:*

- 2.3. Is the school administration strong in its academic and organizational leadership?

*Commendations:*

*Areas for attention:*

- 2.4. Is the school meeting its mission-specific organizational and management performance goals?

[Site visit team: List mission-specific organizational and management performance goals here for reference.]

*Commendations:*

*Areas for attention:*

**3. Is the school meeting its operations and access obligations?**

- 3.1. Has the school satisfactorily completed all of its organizational structure and governance obligations?

*Commendations:*

*Areas for attention:*

- 3.2. Is the school's physical plant safe and conducive to learning?

*Commendations:*

*Areas for attention:*

- 3.3. Has the school established and implemented a fair and appropriate pupil enrollment process?

*Commendations:*

*Areas for attention:*

- 3.4. Is the school fulfilling its legal obligations related to access and services to students with special needs?

*Commendations:*

*Areas for attention:*

- 3.5. Is the school fulfilling its legal obligations related to access and services to students with limited English proficiency?

*Commendations:*

*Areas for attention:*

**4. Is the school providing the appropriate conditions for success?**

- 4.1. Does the school have a high quality curriculum and supporting materials for each grade?

*Commendations:*

*Areas for attention:*

- 4.2. Are the teaching processes (pedagogies) consistent with the school's mission?

*Commendations:*

*Areas for attention:*

- 4.3. For secondary students, does the school provide sufficient guidance on and support and preparation for post-secondary options?

*Commendations:*

*Areas for attention:*

- 4.4. Does the school effectively use learning standards and assessments to inform and improve instruction?

*Commendations:*

*Areas for attention:*

- 4.5. Has the school developed adequate human resource systems and deployed its staff effectively?

*Commendations:*

*Areas for attention:*

4.6. Is the school's mission clearly understood by all stakeholders?

*Commendations:*

*Areas for attention:*

4.7. Is the school climate conducive to student and staff success?

*Commendations:*

*Areas for attention:*

4.8. Is ongoing communication with students and parents *adequate*, clear and helpful?

*Commendations:*

*Areas for attention:*

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*Miscellaneous commendations:*

*Miscellaneous areas for attention:*

**Recommendation for next visit (e.g., school should be visited the following fall or spring, school should be visited after one year, etc.)**

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## Checklist of School Tasks

Identify a contact person to facilitate the site visit questions or issues  
Name of contact person \_\_\_\_\_

Set up a work space for the team  
Location of space \_\_\_\_\_

Provide the following information:

Copy of school's master schedule

Organizational chart and/or list of staff (names, grades, subjects, e-mail address) and map of the school with teachers, grades and classroom locations identified (or numbering system and location and grade of teachers)

Copies of written policies and handbooks for teachers, parents, and/or students (have available during the site visit)

Have each student bring one sample of work to the student focus groups

Set-up a space and identify participants for parent and school staff (instructional staff) focus groups (chairs for 6-8 participants per group, flip chart, paper, pens)