Renewal Site Visit Guidebook

2017 Renewal Cycle

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The Renewal Process

The primary driver of the renewal evaluation is the CSI Annual Review of Schools. The CSI Annual Review of Schools (CARS) is the system used to annually evaluate and accredit schools based on Academic, Financial, and Organizational Performance Frameworks. CARS builds upon the evaluation lens utilized by the State—which evaluates academic achievement, academic growth, and postsecondary and workforce readiness—by including additional measures related to academic, financial, and organizational performance to provide a more comprehensive and robust evaluation that includes strong indicators of charter viability and sustainability.

There are four major components to the renewal process:
1. Renewal application and narrative
2. Geographic meeting and site visit
3. Engagement with the CSI Board and Performance Management Committee
4. CSI Renewal Report and Recommendation

Renewal Application and Narrative

The renewal application provides schools with the opportunity to present new or supplemental evidence around school performance that has not already been captured in the CARS reports or through other school submissions. Renewal applications should focus on providing evidence of the effectiveness of the school's mission and vision. The renewal application includes an opportunity for school narrative regarding the academic program, finances, and leadership and governance. Applicants may also utilize this process to communicate school plans for the next charter term, above and beyond the information provided previously to CSI. Applicants may include a variety of information including but not limited to: strategic growth plans, changes to the educational model or selected curriculum, anticipated operational changes such as the search for a new facility.

While the primary driver of the renewal evaluation is CARS, applicants are encouraged to provide additional document and could include:

- CDE School Performance Framework Reports
- CSSI pre-post visits and evaluation
- Parental and community input
- Progress with UIP performance objectives
- Previous contract milestones and goals

The renewal application is tiered based on prior school performance and the application track is determined by the school's prior year accreditation level. CSI staff may ask for additional information or materials as part of the renewal process and schools might have tailored renewal applications.

Additional information about the renewal application and narrative can be found in the Renewal Application which can be found on the CSI website (http://www.csi.state.co.us/charter_applicants/renewals).

Geographic Meeting and Site Visit

Geographic Meeting

The geographic meeting requirement is designed to ensure that the application process is aligned with the statutory requirements for charter applications and provide an opportunity for the renewal applicants to update the community about their renewal. Additionally, the geographic meeting provides the community the opportunity to provide feedback to the school and ask questions about the proposed renewal.

The meeting can be held in conjunction with other previously scheduled school events such as school board meetings, school accountability committee meetings, parent teacher association/organization meetings or any other school event. During the meeting, schools should share with the community their intention to seek renewal with CSI and provide any updates or changes to their charter included in the application.

A representative from CSI must be in attendance during this meeting.

Site Visit

The site visit will primarily focus on corroborating and augmenting the information found in the charter renewal application and the CARS Report, and to verify that the school is implementing improvement strategies with fidelity.

The site visit structure will parallel the structure of the CARS Report and will include academic, organizational, and financial components. Similar to the CARS Report, the visit will focus on academics but the visit will also include organizational and financial components as needed based on school performance or need. While the site visit protocol will primarily focus on areas for school improvement, the visit will also include an opportunity for the school to highlight components of their program that are unique or are a source of pride for the school.

The site visit is only required for schools accredited with a plan type of Improvement or lower, however, all renewal schools may request a site visit if they are interested.

Additional information about the site visit is included in this document.

Engagement with the CSI Board and Performance Management Committee

During the renewal process, schools will have the opportunity to engage with the CSI Board and the Performance Management (PM) Committee. The applicants will present to the PM Committee at the November meeting and will engage in a discussion with the committee about the school's current level of performance. The applicants may also engage with the PM committee and the CSI board in December when the CSI recommendation and report are shared with the board.

CSI Renewal Report and Recommendation

The CSI Review Team will examine the existing body of evidence and complete a comprehensive and robust evaluation that considered indicators of charter viability and sustainability as well as the renewal application.

The draft report is released to school leaders and board chairs in advance of the December PM Committee and CSI Board meetings in order to ensure that the information contained in the report is an accurate reflection of the school performance.

Applicants are encouraged to review the report, ask any clarifying questions about the evidence included in the report, and identify any errors.

The CSI Renewal Report, including the recommendation, will be shared with school leaders and board chairs before the report and recommendation are provided to the CSI Board.

Site Visit Protocol

Purpose and Overview

The site visit will primarily focus on corroborating and augmenting the information found in the charter renewal application and the CSI Annual Review of Schools (CARS) Report, and to verify that the school is implementing improvement strategies with fidelity.

The CSI Performance Frameworks provide the basis for the CSI Annual Review of Schools. The Performance Frameworks explicitly define the measures by which CSI holds schools accountable with regards to academic, financial, and organizational performance. The three areas of performance covered by the frameworks—academic, financial, and organizational— correspond directly with the three components of a strong charter school application, the three key areas of responsibility outlined in strong state charter laws and strong charter school contracts, and are the three areas on which a charter school's performance should be evaluated.

In each of these three areas, the frameworks ask a fundamental question: how did the school perform last year?

Structure

The site visit structure will parallel the structure of the CARS Report and will include academic, organizational, and financial components. Similar to the CARS Report, the visit will focus on academics but the visit will also include organizational and financial components as needed based on school performance or need. While the site visit protocol will primarily focus on areas for school improvement, the visit will also include an opportunity for the school to highlight components of their program that are unique or are a source of pride for the school.

The academic component of the site visit will draw on the major improvement strategies identified in the Unified Improvement Plan (UIP) and improvement strategies identified by the school leader during the pre-visit call. Additionally, the organizational and financial components of the site visit will focus on areas identified for improvement in the CARS Report, the CSI Compliance Process, or through conversations with CSI staff.

The site visit is designed primarily to be informational, and facilitate access to observational and anecdotal information about the school's performance. However, the review team and the school leader will establish clear and observable outcomes for the site visit through the pre-visit questionnaire and pre-visit planning meeting.

During the site visit, the CSI team will look for evidence to support the areas identified in the pre-visit planning meeting. In addition, the CSI team may request to gather information (via observation, interview, or document review) based on other areas of need.

After the visit, the CSI team will compile evidence gathered during the site visit and provide a summary narrative to school leaders within three weeks. The summary narrative will be included in the renewal report provided to the CSI board.

Charter renewal site visits are differentiated in length and scope based on the school's accreditation rating. The site visit is not required for schools entering the renewal process with a plan type of

"Performance" or higher. Visits may range in length from half a day to one day; however, most visits will take about four hours.

Scheduling and Preparation

Site Visit Coordinator

CSI assumes that the school leader will act as the coordinator and liaison for the renewal site visit; however, the school has the option of designating another person to assume this role. CSI will work with the designated person to ensure that key documents are provided to CSI and the review team prior to the site visit.

Scheduling

CSI typically conducts renewal site visits in September and October. Once renewal applications are released in July, CSI will schedule an initial renewal phone call to review the renewal process and site visit components. The renewal site visit should be scheduled by early August and a pre-visit planning meeting (via phone or in person) should be scheduled by mid-August. These are general guidelines and may vary depending on the date of the site visit (e.g. visits scheduled in late October might have later pre-visit planning meetings). Typically, the pre-visit planning meeting should be schedule at least three weeks prior to the site visit.

The site visit should be schedule on a "normal" school day and the school leaders should ensure that the site visit does not occur during schoolwide testing, field trips, or when other events are scheduled outside of the normal academic program.

Most site visits occur in the afternoon between 12pm-4pm. CSI strongly encourages school leaders to schedule the site visit on the same day as the geographic meeting or a local school board meeting.

Preparation for the Site Visit (5 Weeks Prior to the Visit

Since the academic component of the site visit will draw on the major improvement strategies identified in the Unified Improvement Plan (UIP), it is important to review the most recent UIP prior to the pre-visit planning meeting. CSI will provide the school leader with the most recent copy of the school's UIP Action Plan in advance of the pre-visit meeting. During their review of the Action Plan, the school leader should make note of any observable action steps or implementation benchmarks and note any aspects of the school's improvement efforts that may have changed since the UIP was finalized. If for any reason the school UIP cannot be used as a guiding document for the academic component of the renewal site visit, the school leader and CSI staff member will work to identify current school improvement strategies in areas the school was rated below "meets" on the School Performance Framework and/or CARS report. For schools with multiple ratings falling below "meets", school leader should identify strategies that are impacting the largest number of students.

Additionally, the organizational and financial components of the site visit will focus on areas identified for improvement in the CARS Report, the CSI Compliance Process, or through conversations with CSI staff. The school leader should review the organizational and financial sections of the most recent CARS Report and review and formal (e.g. Notices of Noncompliance) or informal communication (e.g. Formal Reminders or emails) with CSI relating to organizational or financial performance in order to inform the organizational and financial components of the site visit.

Most importantly, the school leader should review the Renewal Pre-visit Questionnaire prior to the pre-visit planning meeting. The Renewal Pre-visit Questionnaire will guide the conversation during the pre-visit planning meeting and ultimately inform the various outcomes that the review team will look to observe during the site visit. Please note that the school leader is not expected to complete the Renewal Pre-visit Questionnaire prior to the meeting.

Pre-visit Planning Meetings (3-4 Weeks Prior to the Visit)

During the pre-visit planning meeting, CSI and the school leader will complete the Renewal Pre-visit Questionnaire. The form is intended to help guide and structure the visit. It is not intended to fully capture all of the improvement strategies that the school is implementing nor reflect the nuance that is associated with school improvement. However, this questionnaire will help to establish the clear and observable outcomes that the CSI team will look for during the site visit.

Responses to the questions are expected to be brief and succinct and reflect observable Implementation Benchmarks or Action Steps from the UIP Action Plan that the CSI review team will have a high likelihood of observing during the site visit.

Additionally, a draft schedule for the site visit will be produced during this meeting

School leaders should anticipate that this meeting will take about one to two hours to complete.

Logistics

Site Visit Team Members

Site visit teams will consist of two or three CSI staff, and may include a CSI board member representative. School leaders are encouraged to invite other school staff and school board members to participate in the visit as well but it is not required.

Week Prior to the Visit

CSI staff will contact the school leader to finalize the visit schedule and logistics. The school leader should ask any additional questions about the visit and protocol at this time.

The Day of the Visit

The site visit begins with a meeting with the school leader and the review team. The site visit team will review the schedule for the day, orient themselves to the school building/site, and review the Renewal Pre-visit Questionnaire. Depending on the schedule and the questionnaire, the site visit teams may also conduct interviews, perform a document review, and meet to calibrate preliminary findings. Any classroom/instructional observations will be accompanied by a school staff representative with instructional expertise.

Closing meeting
At the end of the site visit, the CSI team will meet with school leader(s) to review next steps and answer any questions the school leader(s) may have. The CSI team will avoid making any evaluative statements related to the site visit; however, if any additional concerns arise during the visit, the CSI team may request additional documents or information, as well as sharing the specific cause for concern.

After the Visit

School leaders will be provided with a summary narrative within three weeks of the visit. School leaders have the opportunity to respond to the narrative, if they so choose. The narrative will be included as part of the renewal report provided to CSI's board.

Appendix A: Renewal Pre-visit Questionnaire

Dear School Leader,

The site visit will primarily focus on corroborating and augmenting the information found in the charter renewal application and the CSI Annual Review of Schools (CARS) Report, and to verify that the school is implementing improvement strategies with fidelity.

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The academic component of the site visit will draw on the major improvement strategies identified in the Unified Improvement Plan (UIP) and improvement strategies identified by the school leader during the pre-visit call. Additionally, the organizational and financial components of the site visit will focus on areas identified for improvement in the CARS Report, the CSI Compliance Process, or through conversations with CSI staff.

Please review the form below prior to the pre-visit phone call. After the conversation, an initial draft will be provided to the school leader to review in order to ensure that the outcomes for the site visit are clear and mutually agreed upon.

Site Visit Logistics
School Leader:
Site Visit Contact:
Visit Date:
Special Instructions:

School Highlight Component of the Site Visit
Please identify a component of the program that you would like to highlight during the site visit that unique to your school or a source of pride for the school.

Description of school highlight

How might the site visit team observe this school highlight?

Academic Component of the Site Visit
Please identify at least one action step or implementation benchmark within each Major Improvement Strategy identified on the most recent UIP that the CSI site visit team will be able to observe in action during the charter renewal site visit.

Major Improvement Strategy #1
Observable action step(s)/implementation benchmark

Associated UIP goal

How might the site visit team observe this action step/implementation benchmark?

Major Improvement Strategy #2

Observable action step(s)/implementation benchmark

Associated UIP goal

How might the site visit team observe this action step/implementation benchmark?

Major Improvement Strategy #3

Observable action step(s)/implementation benchmark

Associated UIP goal

How might the site visit team observe this action step/implementation benchmark?

If there are additional focus areas identified for improvement within the school that will be highlighted during the site visit, in the renewal application, or mentioned during the renewal process, please describe them here.

How might the site visit team observe these additional focus areas?

Organizational Component of the Site Visit

Please identify an area that you would like to highlight during the site visit that addresses your organizational performance or addresses an organizational issue. Please review the most recent CARS Report Organizational Performance section or any Notices of Concern or Formal Reminders to identify areas for improvement.

Organizational Highlight or Improvement Strategy

How might the site visit team observe this during the site visit?

If there are additional areas related to organizational performance that CSI would like to see addressed during the site visit, they will be included below. Please include information about how the site visit team might observe any changes or improvements made to address the specific issue identified. Please note that this could be accomplished through an interview with specific personnel at the school.

Additional organizational area(s) identified by CSI to be addressed during the site visit

How might the site visit team observe this during the site visit?

Financial Component of the Site Visit

Please identify an area that you would like to highlight during the site visit that addresses your financial performance or addresses a financial issue. Please review the most recent CARS Report Financial Performance section or any Notices of Concern or Formal Reminders to identify areas for improvement.

Financial Highlight or Improvement Strategy

How might the site visit team observe this during the site visit?

If there are additional areas related to financial performance that CSI would like to see addressed during the site visit, they will be included below. Please include information about how the site visit team might observe any changes or improvements made to address the specific issue identified. Please note that this could be accomplished through an interview with specific personnel at the school.

Additional financial area(s) identified by CSI to be addressed during the site visit

How might the site visit team observe this during the site visit?

Appendix B: Site Visit Review Team Materials

[School Logo]

[School Name] Renewal Site Visit
[Date of Site Visit]

School Mission
[School Mission]

Agenda

Time	Description	Notes

School Contact Information

Head of School	
Phone Number	
Address	

CSI Site Visit Review Team

Name	Title	Contact

School Highlight Component

Pre-visit Questionnaire Information

Description of school highlight	
How might the site visit team observe this school highlight?	

Observation Outcomes

Was the school highlight observable at the school level?	☐ No ☐ Partially ☐ Yes

Please support your selection with observational evidence:

Observation Debrief

Did the observation align with what is typical for the school?	
What do you want us to know about what was observed today?	

Academic Component

Pre-visit Questionnaire Information

Major Improvement Strategy #1	
Observable action step(s)/implementation benchmark	
Associated UIP goal	
How might the site visit team observe this action step/implementation benchmark?	

Observation Outcomes

Was the major improvement strategy observable at the school level?	☐ No ☐ Partially ☐ Yes

Please support your selection with observational evidence:

Observation Debrief

Did the observation align with what is typical for the school?	
What do you want us to know about what was observed today?	

Pre-visit Questionnaire Information

Major Improvement Strategy #2	
Observable action step(s)/implementation benchmark	
Associated UIP goal	
How might the site visit team observe this action step/implementation benchmark?	

Observation Outcomes

Was the major improvement strategy observable at the school level?	☐ No ☐ Partially ☐ Yes

Please support your selection with observational evidence:

Observation Debrief

Did the observation align with what is typical for the school?	
What do you want us to know about what was observed today?	

<u>Organizational Component</u>

Pre-visit Questionnaire Information

Description of organizational highlight or issue	
How might the site visit team observe this during the site visit?	

Observation Outcomes

Was the organizational highlight or issue observable at the school level?	☐ No ☐ Partially ☐ Yes

Please support your selection with observational evidence:

Pre-visit Questionnaire Information

Description of additional organizational issue identified by CSI	
How might the site visit team observe this during the site visit?	

Observation Outcomes

Was the organizational highlight or issue observable at the school level?	☐ No ☐ Partially ☐ Yes

Please support your selection with observational evidence:

Observation Debrief

Did the observation align with what is typical for the school?	
What do you want us to know about what was observed today?	

Financial Component

Pre-visit Questionnaire Information

Description of financial highlight or issue	
How might the site visit team observe this during the site visit?	

Observation Outcomes

Was the financial highlight or issue observable at the school level?	☐ No ☐ Partially ☐ Yes

Please support your selection with observational evidence:

Pre-visit Questionnaire Information

Description of additional financial issue identified by CSI	N/A
How might the site visit team observe this during the site visit?	N/A

Observation Outcomes

Was the financial highlight or issue observable at the school level?	☐ No ☐ Partially ☐ Yes

Please support your selection with observational evidence:

Observation Debrief

Did the observation align with what is typical for the school?	
What do you want us to know about what was observed today?	

Appendix C: CSI Renewal Site Visit Checklist

As soon as Renewal Application is released:

- ☐ Review the Site Visit Guidebook and Appendices
- ☐ Identify several potential site visit dates in September/October. If possible, schedule the site visit on the same day as a school board meeting
- ☐ Schedule initial renewal phone call with CSI staff
- ☐ Review most recent Unified Improvement Plan (UIP)

Five weeks prior to the visit:

- ☐ Confirm site visit date with CSI
- ☐ Schedule pre-visit meeting (phone or in-person)
    - o Ensure that no field trips, special events, or school-wide testing is schedule for day of the site visit.
- ☐ Review UIP Action Plan (provided by CSI, based on most recent UIP)

Three weeks prior to the visit:

- ☐ Submit master schedule and current staff roster (with names, positions,)
- ☐ Complete pre-visit meeting
- ☐ Review site visit protocol with relevant staff and board
- ☐ Work with CSI site team leader to determine the agenda for the visit. Agenda must be finalized at least one week prior to the visit.
- ☐ Identify a secure, private space that can serve as a meeting room for the site visit team throughout the day.
- ☐ Identify staff member(s) who will be available to accompany CSI team throughout the site visit.

One week prior to the visit:

- ☐ Speak with CSI site visit team leader to finalize the visit schedule, observation form, and to discuss logistics. Ask any additional questions about the visit and protocol at this time.
- ☐ Begin to assemble any requested onsite documentation (if applicable).

The day prior to the visit:

- ☐ Distribute the visit agenda to the school community.
- ☐ Determine who should attend the closing meeting at the end of the site visit.
- ☐ Ensure onsite documentation is organized and easily available to site visit team (if applicable).

During the visit:

- ☐ Ensure the site visit team's meeting room remains private.
- ☐ Be available to the site visit team for a morning orientation, scheduled interview(s), and any necessary follow-up. Assist team (or assign designee) in obtaining any additional information, documents, data, or interviews with staff.
- ☐ Bring concerns and questions to the attention of the team as they arise.
- ☐ Attend the closing meeting with the site visit team.

After the visit:

- ☐ Provide any additional documentation or information as requested.
- ☐ Review site visit narrative, and if necessary, prepare a response. This response will be appended to the narrative.
- ☐ Share the final narrative with the school community.