

### **AGENDA ITEM EXECUTIVE SUMMARY**

- I. Public Education Commission Meeting Date: November 15, 2016
- II. Item Title: DISCUSSION AND POSSIBLE ACTION ON SCHOOL SITE VISIT PROTOCOL AND TOOLS USED BY CSD
- III. Executive Summary and Proposed Motions:

#### **Request and Rationale**

The PEC's performance framework, attached, requires the evaluation of the school's performance on a large variety of indicators. In the organizational context, many of these indicators are compliance based and focused on inputs or actions rather than outcomes.

In order to provide the Commission high quality information related to those compliance indicators, CSD staff has created fairly comprehensive monitoring protocols that are implemented during annual site visits. CSD has made slight adaptations to these protocols for renewal schools as compared to new schools and regular annual monitoring visits.

CSD is proactively presenting these materials to the Commission for input, guidance, and revisions.

#### **Proposed motion language:**

- I move to adopt the site visit protocols presented by CSD today, with the revisions and edits discussed on the record.
- I move to convene a limited working group consisting of **[identify members of the working group]** to convene monthly until **[date]** to revise the site visit protocols currently being implemented CSD. The working group shall present revised protocols to the full Commission no later than **[date]**.

Good Day \_\_\_\_\_,

Congratulations on \_\_\_\_\_ becoming a State (PEC authorized) Charter School. The Charter School Division (CSD) staff, on behalf of the PEC, is looking forward to visiting schools across the state to see how charter schools are improving public education in New Mexico by providing quality educational choices.

As part of the PEC's statutory requirement to monitor the fiscal, overall governance and student performance and legal compliance of the charter schools that it oversees (NMSA §22-8B-12), members of the staff will be conducting a first year site visit on your campus. The goal of this visit is to ensure compliance in key areas and observe your program of instruction in action. It is not the intent of the CSD staff to disrupt the learning environment during the site visit and we will not need to speak with teachers or students during our time on campus.

In order for CSD staff to review the status of SDIS, the site visit will focus on three areas:

1. a compliance check,
2. a walk around the school to check for compliance with items in your application Items, and
3. a discussion of the implementation of the school's plan and material terms.

**Compliance Check – Please have these documents available for review:**

1. Documentation indicating all employees, contractors or contractors' employees with unsupervised access to students, have had their backgrounds checked pursuant to NMSA § 22-10A-5.
2. Staff files containing evidence of appropriate staff licensure and evidence of Highly Qualified status for required teachers.
3. Student files containing completed Home Language Surveys, evidence of New Mexico State Residency, and pre-lottery interest/enrollment forms.
4. Documentation demonstrating initial assessment of English language proficiency for all students with at least one response confirming the influence of a language other than English on the home language survey, placement/service of English Language Learners in a specialized English language program, and appropriate parent notification for all students identified as ELL.
5. Student IEP files and contracts and invoices for special education service providers.
6. Documentation demonstrating the implementation of RTI and SAT processes.
7. Documentation demonstrating the continued implementation of the curriculum development plan submitted as part of the planning year process.
8. Notifications, agendas and minutes of governing body meetings for the past twelve months demonstrating compliance with Open Meeting Law (NMSA §10-15).
9. Instructional/bell schedule and school calendar for compliance with required instructional hours (If not available on School Website).
10. Daily Student Attendance Sheet for the day of the visit that shows all students who are enrolled, present and absent (by grade level and classroom).
11. Documentation of Emergency Drills (NM Stat § 22-13-14).

**Application Specific Items:**

1. Staff will tour the facility (with the administrator or appropriate member of the staff, if needed). Please have a copy of a site map available with teachers' names labeled on the map, and a listing of the staff.
2. Staff will count students in each classroom.

3. Staff will spend 5-10 minutes in each classroom observing the implementation of the educational program as described in the charter. Staff may collect blank copies of instructional handouts used during the observed instruction in each classroom.

**Performance Framework**

1. Discuss the implementation of the school's educational program, curriculum, and curriculum development plan.
2. Review the Academic Performance Framework goals and discuss implementation of relevant assessments and data collection for goal reporting.

These first year site visits will occur between **September 26<sup>th</sup> - October 7<sup>th</sup>**. While we know that emergencies and unavoidable scheduling conflicts may occur, we'd like to know if there are specific days during this first year site visit window when your school has events (early release, vacation, parent conferences, etc.) that would not be good days to get an accurate portrayal of your school. Please suggest 2 dates during this timeframe that would be good days to get an accurate portrayal of your school. Please acknowledge your receipt of this letter by providing any dates that you would like us to avoid visiting your campus for the purpose of this first year site visit and please provide 2 dates that would be conducive to a site visit. This acknowledgement can be done by email at \_\_\_\_\_. **Please respond by** \_\_\_\_\_.

On behalf of the PEC, we wish you every success in your endeavors to provide a learning environment that will improve pupil achievement and an additional academic choice for parents and pupils.

If you have any questions, please feel free to contact this office at \_\_\_\_\_.

## Charter Schools Division – NM PED

### Site Visit Agenda and Document Review

#### I. Introduction

#### II. Tour facility, count all students, and observe classrooms

Please provide a copy of the following items to use as a resource during the facility tour:

- a. Site Map*
- b. Staff Listing*
- c. Bell/Instructional Schedule by Grade Level*

#### III. Review requested documents

Please collect and provide a copy of items a-c for me to keep and locate items d-h for me to peruse in their original form after the facility tour:

- a. School Calendar*
- b. Daily Student Attendance Sheet for today that shows all students who are enrolled, present and absent (by grade level and classroom)*
- c. Governing Body meeting notices, agendas, and minutes (if not available on website)*
- d. Evidence of posting of meeting notices*
- e. Employee files with evidence of background check, licensure, and education for all staff*
- f. Student files*
- g. Documentation to demonstrates implementation of the school's ELL, RTI, SAT, and Special Education processes*
- h. Documentation to demonstrates continued implementation of the school's curriculum development plan, which was submitted as part of the planning year process*
- i. Documentation of all emergency drills and implementation of school safety plan*

If copies are needed, CSD staff will make the request.

#### IV. Performance Framework Discussion

#### V. Technical Assistance

#### VI. What happens next

## 1<sup>st</sup> YEAR SITE VISIT SCRIPT

### First year Site Visit Introduction – to School Site Leader

Good morning, my name is **Name**, **Title** at the New Mexico Public Education Department, Charter School Division. **With me is Name, Title**. I/We are here for the first year site visit of **[school name]**. The purpose of our visit is to ensure that a school in its first year of operation **[OR FIRST YEAR AS A STATE AUTHORIZED SCHOOL]** is in compliance with their contractual requirements at the beginning of the academic year. This visit fulfills the Public Education Commission's statutory oversight function and ensures the charter school is in compliance with provisions of charter, federal, and state laws. The goal of this visit is to ensure compliance in key areas and observe the program of instruction in action, as described in the charter contract and Performance Framework.

During this visit, we will be counting students, checking documents for compliance, and making brief observations of the program of instruction, as outlined in the letter sent to the school leader.

**[Present document request list]** This is a list of the documents we would like to review during the visit. The list indicates which ones we would like copies of, and which ones we will review on site. Once I/we have the first three, we would like to visit classrooms. This will give your staff time to collect these other documents for me/us to review. I/we will review all the requested documents after the classroom visits. After that, I/we would appreciate about 45 minutes of your time to discuss the school's plans for implementing the educational program outlined in the charter contract and steps to ensure the school collects and analyzes the data to sufficiently report on the goals in the school's performance framework, and get clarification on items noted during the observation.

## CSD Site Visit Protocol

### 1. Pre-Visit Preparation

Topic	Action	Follow-up/Comments
<b><i>Scheduling</i></b>		
Annual Notification (August 15)	<ul style="list-style-type: none"> <li>Send notice to sites of visit and expectations, request</li> <li>Track responses and send reminders if response not received by 10 business day deadline</li> </ul>	<ul style="list-style-type: none"> <li>Use template letter (Have available at visit)</li> <li>Use Site Visit Master List (create document and link) to track notification and response dates.</li> <li>Save notification and response letters in charter school folder on R-Drive in a "Monitoring" folder</li> </ul>
Calendar Bad Days	<ul style="list-style-type: none"> <li>Track, calendar responses with bad days</li> </ul>	<ul style="list-style-type: none"> <li>Use Site Visit Calendar (on Outlook)</li> </ul>
Create Site Visit Schedule (by late September)	<ul style="list-style-type: none"> <li>Calendar site visit, checking that it is not on a calendared bad day</li> <li>Send notice of site visit data and reminder of expectations</li> </ul>	<ul style="list-style-type: none"> <li>Enter scheduled date on Site Visit Master List when scheduled; update if changed</li> <li>Use template letter (Have available at visit)</li> <li>Save notification letter in charter school "Annual Monitoring" folder</li> </ul>
<b><i>Prepare Folder</i></b>	<i>2-3 weeks prior to the site visit</i>	
Travel Documents	<ul style="list-style-type: none"> <li>Reserve car if &gt;25 miles from office, depending on distance from home</li> <li>Prepare map</li> <li>Complete and submit travel request forms</li> <li>Book and reserve hotel room for overnight stay if necessary</li> <li>Confirm whether school has multiple campus</li> </ul>	<ul style="list-style-type: none"> <li><a href="http://www.generalservices.state.nm.us/transportationservices/">http://www.generalservices.state.nm.us/transportationservices/</a></li> <li>Use Google Maps (to get necessary departure time) and RandMcNally (for official milage)</li> <li>Site visit must include all campuses – check on contract, amendments, and snapshot</li> <li>For Overnight stays work with Valerie to use PCard</li> </ul>
Correspondence	<ul style="list-style-type: none"> <li>Notification Letter</li> <li>Response with dates to avoid</li> </ul>	<ul style="list-style-type: none"> <li>Print both for folder</li> </ul>
Enrollment Documentation	<ul style="list-style-type: none"> <li>Print following enrollment reports for folder: <ul style="list-style-type: none"> <li>ELL Student Audit</li> <li>Count Students by Grade within School from Student Snapshot</li> <li>Special Ed - Membership Count by Disabilities</li> <li>Teachers Classes By District, School, Staff, Course</li> <li>Highly Qualified Teacher Detail by District, Location</li> <li>Licensure Information by District, Location for Snapshot Date</li> <li>Staff Assignments by District, Location, Staff for Snapshot Date</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>STARS</li> </ul>

### Site Visit Protocol

Academic Plan	<ul style="list-style-type: none"> <li>Review Academics and other related sections from New Application School Size, Mission, Curriculum, Instructional Program, Student Performance Standards, Instruction, Staffing Plan).</li> <li>Review Material Terms of Contract</li> <li>Print and review planning year checklist curriculum development plan and first 90 days' curriculum</li> </ul>	<ul style="list-style-type: none"> <li>Print contract material terms for folder</li> <li>Note important elements of new application plan and material terms to look for at site visit</li> <li>Review staffing plan in comparison to staff report from STARS note any major discrepancies</li> <li>Identify curriculum you expect to see implemented based on submitted curriculum, identify curriculum development milestones you expect to see met</li> </ul>
Governance	<ul style="list-style-type: none"> <li>Review By-Laws for membership information</li> <li>Identify governance membership from Board of Finance Application and other documents in file</li> <li>Print most recent governing body minutes if available online</li> <li>Print GB meeting calendar if available</li> </ul>	<ul style="list-style-type: none"> <li>Compare membership identified in minutes against information in file, note discrepancies to discuss with school leader and identify required notifications</li> <li>Ensure minimum number of GB members (per statute and bylaws)</li> <li>Review minutes for OMA concerns use AG's OMA Checklist</li> </ul>
Performance Framework Goals	<ul style="list-style-type: none"> <li>Review goals to understand what data the school must collect, when, evidence the school should retain, and how the data should be analyzed</li> </ul>	<ul style="list-style-type: none"> <li>Print for folder</li> </ul>
Assemble Site Visit Recording Forms	<ul style="list-style-type: none"> <li>This document ( Site Visit Protocol)</li> <li>Site Visit Agenda</li> <li>Site Visit Checklist</li> <li>Site Visit Classroom Observation Form (1 per classroom)</li> <li>Snapshot</li> </ul>	<ul style="list-style-type: none"> <li>Prefill Student file, ELL file, IEP file, and Staff File with information available from STARS reports</li> <li>One of each of the document review forms for every 34 relevant students/staff</li> <li>One Student File Review for every 35 students</li> <li>One Student Count Form for every 17 Classrooms</li> <li>Take one 1st Year Site Visit Classroom Observation Form for every 20 students enrolled</li> <li>See " Site Visit Folder Items" list for details</li> </ul>
Technical Assistance	<ul style="list-style-type: none"> <li>Gather Technical Assistance Documents</li> </ul>	<ul style="list-style-type: none"> <li>See " Site Visit Folder Items" list</li> </ul>
<b>Information Review</b>	<ul style="list-style-type: none"> <li></li> </ul>	<ul style="list-style-type: none"> <li></li> </ul>
Background Info	<ul style="list-style-type: none"> <li>Check school's website</li> </ul>	<ul style="list-style-type: none"> <li>Check school's website for location(s), enrollment policies, calendar, daily schedule, governing body information and documents, educational program – compare to Snapshot and material terms, record if issues noted</li> </ul>
Contract	<ul style="list-style-type: none"> <li>Recent Amendments or Notifications</li> <li>Required Facility Documentation</li> </ul>	<ul style="list-style-type: none"> <li>Pending File – check for possible requests (<a href="mailto:Charter.Schools@state.nm.us">Charter.Schools@state.nm.us</a> inbox)</li> </ul>
Complaints	<ul style="list-style-type: none"> <li>Unresolved Issues</li> </ul>	<ul style="list-style-type: none"> <li>Check for any complaints pending response from charter holder</li> </ul>

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LEA Calendar	<ul style="list-style-type: none"> <li>Check LEA Calendar for number of days, first day, special days</li> </ul>	<ul style="list-style-type: none"> <li>Found on CD from Budget</li> <li>If none inquire with Budget how the school is getting paid</li> <li>If none, address at Leadership Meeting</li> </ul>
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### 2. Site Visit Procedures

Topic	Action	Follow-up/Comments
Introduction  Gather initial documents	<ul style="list-style-type: none"> <li>Greet staff (Principal) and sign in</li> <li>Explain purpose of visit and give overview of visit agenda and procedure</li> <li>Obtain following items: <ul style="list-style-type: none"> <li>site map</li> <li>staff listing</li> <li>bell/class schedule by grade level</li> </ul> </li> <li>Ask site leaders what we can expect to see in classroom observations</li> </ul>	<ul style="list-style-type: none"> <li>Provide business cards (&amp; a copy of site visit notification letter if questions)</li> <li>Allow school day to start - sit down</li> <li>Use Introductory Script</li> <li>Give Site Visit Agenda and Document Review to school staff so items can be pulled while tour is being conducted</li> </ul>
<b>Facility Tour</b>		
Student Count  Academic Program	<p>Tour facility (guided at discretion of site leadership)</p> <p>Observe each classroom 5 – 10 min (at least two per grade/content: focus on core subject areas)</p> <ul style="list-style-type: none"> <li>Identify grade level(s)/content areas of each classroom</li> <li>Record teacher name/grade level on document(s)</li> <li>Count students in each classroom/area and compare to classroom rosters and daily attendance records (if not completed earlier)</li> <li>Observe and record notes on implementation of program of instruction as described in the charter (type, methods, etc.) with focus on teacher/student actions</li> <li>Collect a copy of instructional handouts, etc. observed during tour, as necessary</li> </ul>	<ul style="list-style-type: none"> <li>Ensure student count timed to allow all students to be counted during one class period so count is not disrupted by transition.</li> <li>Use Classroom Observation form</li> <li>Record names of all staff and other adults observed</li> <li>Look for alignment with charter application package and contract material terms</li> <li>Look for implementation of curriculum submitted during planning year</li> <li>Include findings in follow-up letter if necessary</li> <li>Collect instructional materials, as necessary</li> <li>If mixed grade class, look for evidence of grade-appropriate instruction.</li> <li>If multiple teachers per grade/subject, ask leader about coordination</li> </ul>
Staff File	<ul style="list-style-type: none"> <li>Record names of staff observed on facility tour and compare to staff listing provided by school and in STARS</li> <li>Review HQ status for core subject teachers and licensure for all instructional staff</li> <li>Review background checks for all staff</li> </ul>	<ul style="list-style-type: none"> <li>Identify evidence that communication of non-HQT status, if relevant</li> <li>22-10A-5 (C)- background check requirements</li> </ul>



### Site Visit Protocol

	<ul style="list-style-type: none"> <li>Review contracts for all staff</li> </ul>	
Student Files	<ul style="list-style-type: none"> <li>Review files for all students to determine if home language survey is administered</li> <li>Review pre-lottery forms to ensure no equal access/lottery concerns</li> <li>Review all students' files for proof of NM residency.</li> </ul>	<ul style="list-style-type: none"> <li>NMSA22-8B-4 "Except as otherwise provided in the Public School Code, a charter school shall not charge tuition or have admission requirements"</li> <li>A Home Language Survey or Student Language Survey must be completed for all new students enrolling into a school system. Initial identification of student' home/heritage language(s) or language influence must occur within 20 days of enrollment.</li> <li><b>NOTE: Home Language Survey (HLS) should NOT be the place to ask about immigrant status, neither is registration.</b></li> </ul>
Daily Instructional Schedule & Calendar	<ul style="list-style-type: none"> <li>Review the student daily bell/instructional schedule for time spent on core subject areas, recess/lunch, etc. for each grade level</li> <li>Ask for early release or other special schedule if applicable</li> <li>Compare daily instructional hours to those required by law</li> </ul>	<ul style="list-style-type: none"> <li>NMSA 22-2-8.1 <ul style="list-style-type: none"> <li>K(1/2)=450 ; K(Full)=990 1-6=990; 7-12=1080</li> <li>≤ 33 of Full Kindergarten for home visits or parent-teacher conferences.</li> <li>≤ 22 of 1-6 programs for home visits or parent-teacher conferences.</li> <li>≤ 12 of 7-12 for next step plans and parent-teacher conferences.</li> </ul> </li> <li>Include findings in follow-up letter if necessary</li> </ul>
ELL Files (or cum files for students with positive HLS)	<ul style="list-style-type: none"> <li>If student had positive HLS – ensure assessment with WIDA/ACCESS within 20 days of enrollment</li> <li>If student identified as ELL – review parent notification and student placement in appropriate services.</li> </ul>	<ul style="list-style-type: none"> <li>Administer W-APT to determine whether the student is proficient or non-proficient in English. This must be done within the first 20 days after a student enrolls.</li> </ul>
IEP Files	<ul style="list-style-type: none"> <li>Identify where student was assessed for eligibility</li> <li>If eligibility determined at current school ensure evidence of appropriate identification processes including: <ul style="list-style-type: none"> <li>SAT</li> <li>MDT Evaluation</li> </ul> </li> <li>Identify occurrence of timely IEP meetings (30 days of enrollment in new school)</li> <li>Compare services pages with student schedules to ensure services are being provided</li> <li>Review contracts and invoices for services providers for red flags</li> </ul>	<ul style="list-style-type: none"> <li>Red flags include unexplained costs/expenses, mismatch between services on student IEPs and services provided</li> </ul>

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<p>RTI/SAT Process Documentation</p>	<ul style="list-style-type: none"> <li>• Ensure implementation of universal screening</li> <li>• Ensure evidence of properly constituted SAT, with processes to guide child study, implement research based interventions</li> <li>• Ensure evidence of MDT</li> </ul>	<ul style="list-style-type: none"> <li>• NMAC 6.29.1.9-            (1) In Tier 1, the public agency must ensure that <u>adequate universal screening in the areas of general health and well-being, language proficiency status, and academic levels of proficiency</u> has been completed for each student enrolled. If universal screening, a referral from a parent, a school staff member, or other information available to a public agency suggests that a particular student needs educational support for learning, then the student shall be referred to the student assistance team (SAT) for consideration of interventions at the Tier 2 level.            (2) In Tier 2, a properly-constituted <u>SAT at each school, which includes the student's parents and student, as appropriate, must conduct the child study process and consider, implement and document the effectiveness of appropriate research-based interventions utilizing curriculum-based measures.</u> In addition, the SAT must address culture and acculturation, socioeconomic status, possible lack of appropriate instruction in reading or math, teaching and learning styles in order to rule out other possible causes of the student's educational difficulties. When it is determined that a student has an obvious disability or a serious and urgent problem, <u>the SAT shall address the student's needs promptly on an individualized basis, which may include a referral for a multidisciplinary evaluation to determine possible eligibility for special education and related services consistent with the requirements of 34 CFR Sec. 300.300.</u>            (3) In Tier 3, a student has been identified as a student with a disability and deemed eligible for special education and related services (or gifted under state rule), and <u>an IEP is developed by a properly-constituted IEP team pursuant to 34 CFR Sec. 300.321.</u> </li> </ul>
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## Site Visit Protocol

		(4) The Student Assistance Team and the Three-Tier Model of Student Intervention shall be the guiding document for districts/schools to use in the implementation of student intervention.
Student Count Review	<ul style="list-style-type: none"> <li>Sum up number of students counted during tour</li> <li>Compare to daily attendance record, 40<sup>th</sup> day attendance documentation</li> <li>If discrepancy &gt;5%, confirm that all students observed; recount if necessary</li> <li>If students are not in their normally assigned classrooms, ask for list of students with current location and assigned classroom identified</li> <li>Ascertain how enrollment and attendance information is uploaded to STARS if discrepancy greater than 5%</li> </ul>	<ul style="list-style-type: none"> <li>If enrollment #'s reported for payment purposes are within 5%, no further action is required</li> <li>If enrollment #'s are over 5%, compare to SAIS reports. Follow-up to review attendance reporting requirements. Include findings in follow-up letter if necessary</li> <li>See Student Count Procedures</li> </ul>
Governing Body Meetings	<p>Review notices, agendas, and minutes of meetings for compliance with OML.</p> <p>Confirm posting procedures and location of postings</p> <ul style="list-style-type: none"> <li>How does the charter holder meet the 72 hour timeline?</li> <li>Online on Website – Do they conspicuously post a statement on their website stating where all public notices of their meetings will be posted, including the physical and electronic locations?</li> </ul> <p>Body:</p> <ul style="list-style-type: none"> <li>Do members match CSD info?</li> <li>Does membership align to number required in Bylaws?</li> </ul> <p>Agendas:</p> <ul style="list-style-type: none"> <li>Correct date, time, and location</li> <li>Specific language is used</li> <li>Discussion, consideration, decision items appear on agenda</li> </ul> <p>Minutes:</p> <ul style="list-style-type: none"> <li>Entity name</li> <li>Date, time, and place of meeting</li> <li>Members recorded as present or absent</li> <li>General description of matters considered with decisions (record of vote)</li> <li>Appropriate Executive Session notation</li> <li>How does the governing body make the minutes available to public within 10 days?</li> </ul>	<ul style="list-style-type: none"> <li>NMSA 10-15-1- <ul style="list-style-type: none"> <li>Meeting notices shall include an agenda containing a list of specific items of business to be discussed or transacted at the meeting or information on how the public may obtain a copy of such an agenda. Except in the case of an emergency or in the case of a public body that ordinarily meets more frequently than once per week, at least seventy-two hours prior to the meeting, the agenda shall be available to the public and posted on the public body's web site, if one is maintained.</li> <li>The board, commission or other policymaking body shall keep written minutes of all its meetings. The minutes shall include at a minimum the date, time and place of the meeting, the names of members in attendance and those absent, the substance of the proposals considered and a record of any decisions and votes taken that show how each member voted. All minutes are open to public inspection. Draft minutes shall be prepared within ten working days after the meeting and shall be approved, amended or disapproved at</li> </ul> </li> </ul>

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		<p>the next meeting where a quorum is present. Minutes shall not become official until approved by the policymaking body.</p> <ul style="list-style-type: none"> <li>• Include findings in follow-up letter if necessary</li> <li>• Compare attendance with membership of School Governing Body from CSD information</li> </ul>
Curriculum Development (First Year Only)	<ul style="list-style-type: none"> <li>• Review evidence to ensure school is continuing to implement curriculum development plan submitted during planning year</li> </ul>	
Academic Performance Framework	<ul style="list-style-type: none"> <li>• Review academic performance goals from Academic Performance Framework</li> <li>• Ask about data the school is collecting, how, when. Ask about summary of data vs. evidence that will support summary</li> <li>• Ask how schools it feels about meeting goals, ask with school is doing to make progress toward goals</li> </ul>	<ul style="list-style-type: none"> <li>• Address grade requirement—discuss improvement plan if school does not receive better than C</li> <li>• Substantial time should be spent on individual school goals</li> </ul>
Emergency Drills and Safety Plan	<ul style="list-style-type: none"> <li>• Review school safety plan and emergency drill documentation</li> <li>• Ask about school's implementation</li> </ul>	<p>NMAC - 6.29.1.9 –</p> <ul style="list-style-type: none"> <li>• at least once per week during the first four weeks of the school year the school shall conduct fire drills</li> <li>• at least once per month during the remainder of the school year the school shall conduct additional emergency drills; <ul style="list-style-type: none"> <li>○ two of these drills shall be shelter-in-place drills;</li> <li>○ one of these drills shall be an evacuation drill;</li> </ul> </li> <li>• the remainder shall be fire drills</li> </ul>
Technical Assistance	<ul style="list-style-type: none"> <li>• Walk-through website (Amendments/Notifications, staff structure, general submission email, meeting information)</li> </ul>	<ul style="list-style-type: none"> <li>• Provide hard copy and forward electronic copy of <i>Useful Websites</i> and Resume example</li> </ul>

### 3. Follow-Up Procedures

Topic	Action	Comments
Follow-Up and/or Close-out Letter	<ul style="list-style-type: none"> <li>• Summary of items reviewed</li> <li>• Observations and findings</li> <li>• Follow-up action/information with deadline</li> <li>• Monitor for requested action/information</li> </ul>	<ul style="list-style-type: none"> <li>• Within 10 business days, unless issues identified are critical, within 5 business days</li> <li>• Use template letter</li> </ul>

### Site Visit Protocol

	<ul style="list-style-type: none"> <li>Possible disciplinary action if school fails to comply</li> </ul>	<ul style="list-style-type: none"> <li>Attach Technical Assistance document <i>Useful Websites</i></li> </ul>
Tracker	Create Site Visit on Tracker	
Recordkeeping	<ul style="list-style-type: none"> <li>Complete site visit worksheet after visit and letters have been sent</li> </ul>	
	<ul style="list-style-type: none"> <li>Place all documents in appropriate hard and electronic files</li> </ul>	<ul style="list-style-type: none"> <li>Working file</li> <li>Hard file</li> <li>Scanned into electronic file</li> </ul>
	<ul style="list-style-type: none"> <li>Enter site visit info in database</li> </ul>	

# **Site Visit Classroom Observation Form**

Date/Time:

School:

Reviewer: \_\_\_\_\_

Teacher/Room:

Grade/Subject:

Student Count:

Elements	Comments/Evidence
<p><b>1. Is there evidence of school mission / educational program in classroom?</b></p> <p><b>Please describe specific evidence observed.</b></p>	
<p><b>2. Is there evidence school is implementing Common Core and NM State Standard aligned instruction?</b></p> <p><b>Please describe specific evidence observed.</b></p>	
<p><b>3. Describe instructional activities and/or assessments.</b></p> <p><b>Based on your professional judgment, are these activities aligned to common core, the school mission, and the school program and is this instruction appropriate to grade level and student ability?</b></p> <p><b>Please provide specific evidence to support your conclusion.</b></p>	
<p><b>4. Is there evidence of serving special populations ELL/ SPED? <i>(If no evidence apparent you may wish to ask the teacher which students are present in the classroom and how these students are served).</i></b></p> <p><b>Using your professional judgment, is this instruction appropriate? Why or Why not?</b>  <i>(For ELLs, students must be provided access to grade level content AND the opportunity to develop English language skills)</i></p> <p><b>Please provide specific evidence to support your conclusion.</b></p>	

<p>5. <b>Is there evidence outcomes are being used to drive instruction?</b> (If no evidence apparent you may wish to inquire from teacher how outcomes are used to drive instruction. )</p> <p><b>Please provide specific evidence to support your conclusion.</b></p>	
<p>6. Were <u>any</u> concerns apparent during observation?</p> <p><i>(E.g. Unprepared teachers. Teachers not in control of classroom, students not 100% engaged, fights, lack of curriculum, etc.)</i></p>	
<p>7. Were any exemplary practices observed?</p> <p><b>Please provide specific evidence to support your conclusion.</b></p>	

Introduction Protocol	
#1 Greet Staff (Principal) and sign in.	
#2 Explain purpose of visit.	
#3 Provide overview of visit agenda / procedure.	
#4 Ask staff leader what we can expect to see in class room.	
#5 Provide Business Cards	
#6 Read Introduction Script	
#7 Give Site Visit Agenda to School Leader	
#8 Give Document Review List to School Leader	
#9 Provide Charter School Governance Contract Form -- Explain a form for each Governing Body member needs to be filled out.	
#4 Obtain following items	Item Collected?
A Site Map	
B Staff Listing	
Bell/class schedule by grade level	
Site Visit Instructions	
Each column has an indicator heading. These indicators test compliance objectives for the school.	
Under the indicator heading, the observer will fill out the actual finding or what was actually observed.	
If the documentation does not meet the compliance objective then the observer will highlight the documented answer. (This cell has been highlighted as an example)	
For staff and student files, only write down initials. If a highlighted cell identifies an indicator objective deficiency then you may temporarily document additional information in order that you can identify the file for the school. Please be sure after you given this information to the school that any additional identification is removed. (As an example, the form may document a deficiency for "Jane Doe". You can communicate this file location to certified school staff so the staff may correct the deficiency. After this file name had been communicated. The name would be replaced with "J/D".)	



Name of School	Date	Type of Visit (40 day or renewal)	Name of Person Completing Form
<b>General Information:</b>	<b>Input Information Below:</b>		
Head Administrator:			
School District:			
Enrollment cap:			
Authorized to serves grades:			
<b>School Mission</b>			
<b>School Report Card Grades:</b>	<b>School Year</b>	<b>Grades</b>	
Year 1 (Most Recent)			
Year 2			
Year 3			

Teacher	Grade	Subject	Student Count	Class Setting	Evidence of program implementation	Describe Class Setting	Instructional activities	Curriculum Resources	Special Instructions: Please use the form given for the class observation then enter the necessary information on this page.



Student's initials	Student ID#	Current Evaluation date	Does Evaluation date align with STARS data? (This indicator may be completed off-site.)	Was Evaluation Timely? An evaluation is timely if it was either: Within 3 years since last evaluation OR 60 days since enrollment of current school.	Does school document the following? "a statement whether the child does not make sufficient progress to meet age or grade-level standards, or the child exhibits a pattern of strengths and weaknesses in performance, achievement, or both, relative to age, grade level standards or intellectual development." (YES/NO/Not Applicable). If the student is gifted or has a 504 plan "Not Applicable" may be appropriate.	Does school have evidence that eligibility and identification were determined by a Multi-Disciplinary Team (MDT)?	Identify the listed eligibilities: (there may be several) (For the purposes of this form, please include "gifted" as a separate eligibility.)	Determining whether school may be misidentifying English Language Learners. -> For any students identified as having a Specific Learning Disability OR Speech Language Impairment: Please review "Student Files Data" and review the indicators on Home Language Survey and W/APT. Please document here any student that indicated a Specific Learning Disability or Speech Language Impairment AND indicated any language on the Home Language Survey besides English.	Eligibility level (Will be listed as either I, II, III, IV OR A, B, C, D.)	Does the eligibility level correlate with STARS Data? (This indicator may be completed off-site.)	Individualized Education Program (IEP) Date:	Does IEP Date align with STARS Data? (This indicator may be completed off-site.)	Is the Individualized Education Program (IEP) timely? An IEP <u>must</u> be administered annually. IEP's are timely if they are done within 30 days of the start of the school year OR for a recently enrolled student, within 30 days since last evaluation.	Briefly identify the type of services the student Individualized Education Program (IEP) requires.	Identify whether the plan calls for: (Individual Service / Group Service /or Not Applicable)	How many hours of service hours does the IEP require? (please also indicate if these hours are per week or per month)	Where do the services occur or where are they provided?	Does the school have evidence that the services are being provided? The school <u>must</u> document a log of these services. There is a NMPED form but the form itself is not required. A plan to provide the hours is NOT sufficient. (Please pay particular attention to higher level IEP's and special accommodations such as transportation, pull out, or need for specialized equipment. You may need to inquire directly about evidence of these services and accommodations)	Review the service logs. Are the service hours being provided for each student?	Are all required signatures present in the Individualized Program? For the purposes of this form, please just verify that it includes the required parent signature.	OTHER --> Please document anything that stands out from SPED file.

DATE or (report period) of STARS report	# of SPED Membership during visit	If there is a discrepancy between STARS report and Visit membership please note it here. (Not Applicable for 1st year /40 day visits)	Review Staff Files Data: Please identify all Special Education Teachers. Do all teachers have Special Education Licensure for PreK-12?	Review Staff Files Data and Sped Files Data. Please identify all special Education Teachers. Are the total contracted hours sufficient to provide the identified service hours? If any concern whether school has staff capacity to provide services, please question school. How do they ensure all services are provided?	Review SPED Files Data (previous worksheets) Are there patterns or uniformity in service? In other words, does data indicate school may possibly be providing service based on level of eligibility? (Basically you're looking to see if all students of a similar eligibility have the same or similar service hours)	Question to school: Who determines the amount of SPED and Related services?	Question to school: How is the amount of related SPED and related service hours determined? (IEP identified program should drive level of service and not school scheduling, school program, provided availability etc. If the school indicates otherwise please be sure to highlight the school's response to this indicator).	Review SPED Files Data. Please document the number of students that both identified as having a specific learning disability or speech language impairment AND indicated on the home language survey any language besides English. (If you are unable to determine this from file reviews then ask school for this number.)	Question to school: How are staff caseloads determined? (Please pose this question at all schools regardless of school size)	Questions to school: Does school participate in school based Medicaid services?	Question to school: If the answer to the previous question is yes. How are reimbursement funds utilized?	Question to school: Does the school obtain written consent to provide services?	Question to school: What criteria are used to determine whether a student qualifies for related services?	Question to School: Based on the caseloads, how do you determine the amount of Full Time Employees (to service special education and related services) that you need?	Question to School: How is it determined that a student no longer needs services and what is the procedure for terminating services?	Question to School: Who is responsible for entering STARS Data? (Please secure name, role, and contact information)	Question to School: Please describe process for identifying students who are gifted?	Review SPED Files Data. Did school identify any gifted students who were level III or IV? (In some files, these may be described as C or D).	If the answer to the previous question is yes, then question school: How was it determined what services to provide to these students? And who determined this?	Who provides the gifted services? (Not just name, but what is their role?)	Other -- Please document any other issues that were identified during the Special Education Program review.
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Student's initials	Grade level	Current Registration for 2016-17	Home Language Survey Present? There should only be one home language survey per file. Document if there is more than 1. A school may choose to request the Home Language Survey from another school. If this is the case, and there is no Home Language Survey the school <u>must</u> document its request efforts.	W-Apt Required? The W-APT is required <u>ANY</u> time on the Home Language Survey another language besides English.	W-APT given within 20 days of student enrollment (or within 20 days of Home Language Survey)? These scores <u>must</u> be in file.	For returning ELL students document the WIDA scores.	Does the W-APT or WIDA indicate the student scored a 5 or higher? If student scores higher than a 5. Then student has "exited the program" and should no longer be serviced.	For students that scored higher than a "5" on the WIDA. Verify that WIDA is not still given.	(For Virtual School and Schools close to the Border only -- Please see your team leader if you are unsure whether this applies.) Residency verification: New Mexico Students must be residents of New Mexico. Residency may be evidenced through bills, mail, address verification forms, or other methods.	Does file contain any attendance Letters? (After site visit these letters will be compared to truancy data from STARS to determine indicator compliance).	OTHER --> Please document anything that stands out from Student File.

Does the school require sign-ins or require name tags for visitors? (e.g. You are a visitor!)	Does school provide Health Education Curriculum? (Will likely need to inquire)	Does School provide Physical Education (Grades 1-8 only) (Will likely need to inquire)	Was there a fire drill at least once per week during the first four weeks of the school?	Is there evidence of at least one fire drill per month during the school year?	Is there evidence of at least one evacuation drill? (If no drill in evidence, please look at previous year).	Is there evidence the school does at least 2 shelter-in-place drills per year? (Again, if no evidence of drills in the current year then look to previous year).	Does the school have evidence of a Safety Plan? This is distinct from the Emergency Operations Plan. We are not requesting the Emergency Operations Plan as it is generally considered confidential.	Does the School Safety Plan include Prevention Policies and Procedures?	Please conduct a cursory review to determine if any prevention policies in the safety plan are being implemented. Please document evidence of compliance or non compliance. Common prevention Policies that may be verified during visit include: Posting of tobacco and drug free signs, Bullying Prevention training documentation, (typically in the staff file) and designated student pickup / drop off sites.	OTHER --> Please document any Health or Safety Concerns

<div>During Visit - Secure the most recent list of Governing Body Members, AND the most recent Annual Resolution--if these are not available on the website.</div> <div>Provide these to the team leader. Should the school have difficulty providing it -- then will be an item to follow up on.</div>	<div>Provide Copies of Charter School Governance Contact Form. Explain that a form for each Governing Body Member needs to be provided.</div>	<div>Review the most current Agenda: Verify Agenda includes the following: 1) Date: 2) Time: 3) Address: 4) Agenda Items:</div>	<div>Review Minutes -- verify they Include the names of all members of the governing body attending the meeting:</div>	<div>Review minutes -- verify they Include the names of all members of the governing body that were absent from the meeting:</div>	<div>Review minutes --Verify they include a description of the substance of all proposals considered during the meeting; and</div>	<div>Review minutes -- verify school has a record of any decision made and votes taken that shows how each member voted:</div>	<div>Review minutes and locate one that includes a Closed Meeting or Executive session. Verify that Minutes record the authority for closure and the subject discussed: Permitted Subjects are: <i>(Any reason other than those below are not valid)</i><ul style="list-style-type: none"><li>• Discussion of the hiring, promotion, demotion, dismissal, assignment or resignation of a public employee, or the investigation or consideration of complaints or charges against a public employee.</li><li>• Discussions of personally identifiable information about an individual student.</li><li>• Discussions of collective bargaining strategy.</li><li>• Discussions of sole source purchases that exceeds \$2500 or of the contents of competitive sealed proposals during the contract negotiation process.</li><li>• Meeting with the GB counsel but only pertaining to threatened or pending litigation.</li><li>• Discussion of the purchase acquisition or disposal of Real Property (Land)</li></ul><div>o The advice of the Governing Body's counsel where governing body has reasonably identified the subject and authority</div></div>	<div>Review minutes for Closed Meeting --Verify minutes include a roll call vote to go into closed session.</div>	<div>Review minutes for Closed Meeting -- Verify minutes record a statement that sufficiently conveys the following, "matters discussed in the closed meeting were limited only to those specified in the motion for closure":</div>	<div>Verify school provided minutes for the past 12 months.</div>



Verify school has an RTI/SAT plan.	RTI/SAT Plan Tier 1 - school provides evidence of screening of each of the following: <ul style="list-style-type: none"><li>• Academics - includes short cycle assessments administered to all students 3x/year</li><li>• Vision</li><li>• Hearing</li><li>• language proficiency (L1 and L 2)</li><li>• general health</li><li>• social and behavioral health</li><li>• socioeconomic status</li></ul>	RTI/SAT Plan Tier 1 - All students also receive appropriate, standards-based, core instruction including any classroom, grade-level, or school-wide interventions (universal interventions) for academics and behavior.  Tier 1 universal interventions are provided in the general education classroom and may consist of programs that have a mild, moderate, or intense instruction (i.e., differentiated or tiered instructional programs). Tier 1 universal interventions are determined and monitored by the classroom teacher, a grade-level team, and/or a building team.  Identify evidence that Tier 1 universal interventions are being provided and monitored. ☐	Tier 2 -- School RTI/SAT plan identifies a plan or policy for convening of a Student Assistance Team (SAT Team)	Tier2 - Students who have not responded significantly to Tier 1 core program with universal interventions are referred to the Student Assistance Team (SAT) and <u>may receive an individual SAT intervention plan</u> .  The SAT Intervention plan could include more intense instruction in terms of nature, frequency, and duration, provided individually or in small groups, and happens in addition to the general education curriculum. Tier 2 services are designed to supplement, enhance, and support Tier 1 programs, and are provided by the classroom teacher, unless the SAT determines otherwise.  Students with disabilities who do not qualify for special education services may also be served at this tier through a Section 504 accommodations plan.  Identify evidence of implementation and monitoring of Tier 2 SAT intervention plans; monitoring must include progress monitoring data collected every few weeks for individual students.	Tier 3 (Individualized Educational Plan) -- School RTI/SAT plan calls for a referral for an evaluation and use of a <u>diagnostician</u> .	Tier 3 (Individualized Educational Plan) -- This student receives specially-designed instruction and related services through an Individualized Education Program (IEP) that is developed and monitored by the student's IEP team.  IEP team determines if it will collect data weekly, biweekly, monthly, or annually to progress monitor the student's growth towards IEP goals.  At any point, if a student is not responding well to the IEP services, the team meets to review that data and adjusts the IEP, as necessary.  Identify concerns from IEP review.	Evidence of staff professional development related to RTI/SAT documented and confirmed.

Student Initials	Grade Level of Plan	<b>Is Next Step Plan Timely?</b> Each grade-level next step plan shall be completed within the last 60 school days of the preceding school year (For example, the 9th grade interim next step plan shall be made 60 days before the end of the 8th grade year.	<b>Is there more than one next step plan per student per year? (Each student may only have one next step plan in a single year)</b>	<b>Review Grade Level is this a Senior (12th grade Plan_?</b>	<b>Does Final Next Step Plan (Plan completed during the senior year) include all required signatures?</b> For the purposes of this form the required signatures are Principal, student, student’s parents, and one other school official such as an adviser. Note that parents are exempt if the student is 18 years old.	<b>Does Next Step Plan set forth the coursework and classes needed for the grades remaining until high school graduation?</b>	<b>Does Next Step Plan address personal and academic goals?</b>	<b>Does Nest Step Plan identify post graduation goals?</b> (Generally this should identify target occupation or post secondary education goals)/
<b>Next Step Plans are only required for schools serving grades 8-12. Please be sure to do a sample of each grade.</b>								

	Does the school's educational program meet what is described in the charter ?	School provides evidence of implementing CCSS and NM standards.	School has evidence of learning standards or objectives for each course.	School has evidence of units and lessons that teachers will teach.	School has evidence of assignments and projects given to students.	School has evidence of identified books, materials, videos, presentations, and readings to be used in each course. (If none evident during class tours then requests a list of the materials that will be used.)	The school has identified all tests, assessments, and other methods to be used in the course of the year.)
Bilingual Multicultural Education Program Questions							
Do they Have a Bilingual Multicultural Program? (YES/ NO)							
If so, then identify the type of program: Dual Language / Maintenance / Enrichment / Heritage / Transitional.							
	Dual Language --> Verify the school is providing 3 hours of home/heritage target language & 3 hours of English / English language arts.	Maintenance --> Verify the school is providing 1 hour of heritage language arts & 1 hour of English as a Secondary Language	Enrichment--> Verify the school is providing 1 hour of heritage language.	Heritage --> Verify the school is providing 1 hour of home heritage language.	Transitional --> School has 1 hour of home heritage language & one hour of English as a Secondary Language or English Language Development.		
	Alternative Education Questions						
Q. Does the school offer remote online classes?							
Q. Does the school offer a blended learning program? (Where the students come into the school to work on a computer).							
Q. Does the school have any alternative schedule programs? (Nights / Evenings / Weekends)							
Q. Does the school offer a credit recovery program? (Part time students)							
Q. For students that attend these alternative programs are they also required to attend the regular program? And if so how often?							
Q. Were these programs part of the school contract or has the school received an amendment for the program?							
Q. When was the program instituted?							
Q. How many total students are currently enrolled in each of these programs?							
Q. What is the required schedule for each of these programs?							
Q. How do you track class attendance for these programs?							
Q. How do you track class hours for these programs?							
Q. What data do they have to support?							

Schools Academic Goals	Met or not	Data to support
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<p><b>Rules:</b> NMSA § 22-2-8.1 / NMSA § 22-8.9 /NMAC § 6.29.1.9</p> <p><b>Required Hours</b></p> <p>Kindergarten (Half Day) Requirement: 450 Hours Per Year.</p> <p>Kindergarten (Full Day) Requirement: 990 Hundred Ninety Hours Per Year</p> <p>Grades 1-5 Requirement: 990 Hours Per Year</p> <p>Grades 7-12 Requirement 1080 Hours Per Year</p> <p>Grades 6 (When Grades are 1-6) Requirement: 990 Hours apply.</p> <p>Grades 6 (When Grades include 6 and ANY 7-12) Requirement: 1080 Hours Apply.</p> <p><b>Counting:</b></p> <p>School Directed Program Time Only.</p> <p>Lunches do not count.</p> <p>Breaks and Passing Periods do not count.</p> <p>Field Trips: Assume Regular School Day</p> <p>(Drive times and sleep times and break times do not count)</p> <p><b>Teacher Conferences and Home Visits May Count:</b></p> <p>Grades 1-5 Max of 33 hours</p> <p>Grades 7-12: Max of 12 Hours.</p>	
	<b>Total School Directed Program</b>

**Please document any concerns regarding the facility. Concerns may include: Identified Hazards, Capacity Concerns, Ownership / Lease Concerns.**

**NOTES:** Use this to document any notes or findings that do not fit into a previous category.

### **Renewal Only: Teacher Questions**

Names of interviewee(s):

- 1) Why have you chosen to teach at this school?
- 2) If this school were not available, where would you likely teach?
- 3) Do you support the Continued operation of this school, as it is today? Why or why not?
- 4) What is the school's mission? Is it successfully achieving this? How?
- 5) Does the school regularly communicate with you? What does it communicate about?
- 6) Does the school enable you to participate in its operations? What role do you play in shaping the current status and future of the school? How do you participate?
- 7) What do you like about the school?
- 8) Is there anything that concerns you about the school?
- 9) What changes do you believe the school needs to make? Why?
- 10) What training and professional development have you been provided? Is it sufficient to meet your professional learning needs?
  
- 11) Are students' needs being met through the school's programs? Why or why not? If yes how?
- 12) How do you use data to inform instruction?
- 13) How and when are students engaged in the Student Assistance Team (SAT) process?



### **Renewal Only - Site Visit Questions for Parents**

Name of Interviewee(s):

- 1) Why do you choose to have your student(s) attend this school?
- 2) If this school were not available, where would your student attend school?
- 3) Do you support the continued operation of this school, as it is today? Why or why not?
- 4) What is the school's mission? Is it successfully achieving this? How?
- 5) Does the school regularly communicate with you? What does it communicate about? How does it communicate with you?
- 6) Does the school enable you to participate in its operations? What role do you play in shaping the current status and future of the school? How do you participate?
- 7) What do you like about the school?
- 8) Is there anything that concerns you about the school?
- 9) What changes do you believe the school needs to make? Why?

### Renewal Only -- Site Visit Interview for Students

Names of interviewee(s):

- 1) Why do you choose to attend this school?
- 2) If this school were not available, where would you attend the school?
- 3) Do you support the continued operation of this school, as it is today? Why or why not?
- 4) What is the school's mission? How is the school mission being met at your school?
- 5) Does the school regularly communicate with you? What does it communicate about? How does it communicate with you?
- 6) What do you like about the school ?
- 7) Is there anything that concerns you about the school?
- 8) **(HIGH SCHOOL ONLY)** What changes do you believe the school needs to make? Why? (If applicable) How often do teachers or other staff members review your Next Step Plans with you?

## **Renewal Only - Site Visit Interviews for Governing Body Members**

Name of interviewee (s):

- 1) Why do you choose to be a governing body member for this school? Describe your role and the Board's role.
- 2) Do you support the continued operation of this school, as it is today? Why or why not?
- 3) What is the school's mission? What steps does the Governing Board take to ensure the mission of the school is implemented?
- 4) Describe the overall performance of the head administrator and any specific support for that assessment. What steps does the Governing Board take to ensure the head administrator is leading the school towards academic progress. How is the head administrator evaluated?
- 5) Describe the current financial status of the school. What steps does the council take to ensure the school is fiscally sound?
- 6) Describe the school's current academic performance. How does the school's academic data drive governing council decision making?
- 7) Does the school regularly communicate with you? What does it communicate about? How does it communicate with you?
- 8) What do you like about the school?
- 9) Is there anything that concerns you about the school?
  
- 10) Describe how well the Governing Body is doing its job. How are new members selected and onboarded? How does the Governing Body evaluate itself? How does the Governing Body improve its functioning and capacity.

Item Collected/Observed	Status	Comments/Evidence
1. Facility Tour and Student Count by Grade Level : <i>Tour facility, count all students and obtain copies of classroom rosters for the day.</i>	<input type="checkbox"/> NO follow-up <input type="checkbox"/> YES Follow-up needed	
2. Program of Instruction: <i>Classroom observations (5-10 mins), collect copies of instructional handouts observed during tour; note evidence of whether academic program and material terms are being implemented, note evidence of whether first 90 days curriculum as provided in the planning year is being implemented</i>	<input type="checkbox"/> NO follow-up <input type="checkbox"/> YES Follow-up needed	
3. Staff Files and Background Checks: <i>Obtain copy of staff roster. Check background checks for all staff. Ensure proper licensure and HQT status for all teachers.</i>	<input type="checkbox"/> NO follow-up <input type="checkbox"/> YES Follow-up needed	
4. Student Files: <i>Review files for all students to determine if home language survey is administered, pre-lottery forms are acceptable, and each student has proof of NM residency.</i>	<input type="checkbox"/> NO follow-up <input type="checkbox"/> YES Follow-up needed	
5. Governing Board OML Compliance: <i>Notifications, minutes and agenda for current fiscal year. Review board membership if issues are identified.</i>	<input type="checkbox"/> NO follow-up <input type="checkbox"/> YES Follow-up needed	
6. Implementation of Required ELL Identification Process <i>Based on Student file review of HLS review implementation of WIDA/ACCESS assessment and student placement/ILLP, and parent notification.</i>	<input type="checkbox"/> NO follow-up <input type="checkbox"/> YES Follow-up needed	
7. Implementation of Required RTI and SAT Processes <i>Look for evidence of process/policy implementation.</i>	<input type="checkbox"/> NO follow-up <input type="checkbox"/> YES Follow-up needed	
8. Implementation of Special Education processes <i>Identify where student was assessed for eligibility. Look for evidence of timely IEP meetings (within 30 days of enrollment, annual), review service pages and compare to ensure students are receiving services, review contracts and invoices for service providers to ensure no red flags.</i>	<input type="checkbox"/> NO follow-up <input type="checkbox"/> YES Follow-up needed	
9. Implementation of curriculum development plan (first year schools only) <i>Look for evidence of implementation of plan which was submitted as part of the planning year process</i>	<input type="checkbox"/> NO follow-up <input type="checkbox"/> YES Follow-up needed	

<p>10. Daily Instructional Schedule &amp; School Calendar:  <i>K(1/2)=450 ; K(Full)=990 1-6=990; 7-12=1080</i></p> <p><i>≤ 33 of Full Kindergarten for home visits or parent-teacher conferences.</i>  <i>≤ 22 of 1-6 programs for home visits or parent-teacher conferences.</i>  <i>≤ 12 of 7-12 for next step plans and parent-teacher conferences.</i></p>	<p><input type="checkbox"/> NO follow-up  <input type="checkbox"/> YES Follow-up needed</p>	
<p>11. Emergency Drills and Safety Plan:  NMAC - 6.29.1.9 –</p> <ul style="list-style-type: none"> <li>• <i>at least once per week during the first four weeks of the school year the school shall conduct fire drills</i></li> <li>• <i>at least once per month during the remainder of the school year the school shall conduct additional emergency drills;</i> <ul style="list-style-type: none"> <li>○ <i>two of these drills shall be shelter-in-place drills;</i></li> <li>○ <i>one of these drills shall be an evacuation drill;</i></li> <li>○ <i>the remainder shall be fire drills</i></li> </ul> </li> </ul>	<p><input type="checkbox"/> NO follow-up  <input type="checkbox"/> YES Follow-up needed</p>	
<p>9. Academic Discussion: <i>Discuss school academic plan and Academic Framework. Specifically discuss assessment implementation and data collection for each goal.</i></p>	<p><input type="checkbox"/> NO follow-up  <input type="checkbox"/> YES Follow-up needed</p>	
<p>10. Summary Review: <i>Review snapshot for accuracy; notify charter holder of need for any amendments based on observed discrepancies.</i></p>	<p><input type="checkbox"/> NO follow-up  <input type="checkbox"/> YES Follow-up needed</p>	
<p>11. Technical Assistance: <i>Provide and review the materials within the packet with charter rep or school leader.</i></p>	<p><input type="checkbox"/> NO follow-up  <input type="checkbox"/> YES Follow-up needed</p>	

## Staff Document Review

[illegible]

## Student File Review

[illegible]

## IEP File Reviews

[illegible]



## ELL File Reviews

[illegible]



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HANNA SKANDERA  
SECRETARY OF EDUCATION

SUSANA MARTINEZ  
GOVERNOR

**Renewal Site Visit Checklist**

**PURPOSE OF THE VISIT**

The Charter Schools Division (CSD) shall conduct a Charter Renewal Site Visit of every charter school that seeks to renew its charter with the state. The purpose of the site visit is to determine whether the renewal applicant met the conditions, standards and procedures set forth in the charter contract; met or made substantial progress toward achievement of the department's standards of excellence or student performance standards identified in the charter contract; met generally accepted standards of fiscal management; and complied with all provisions of law from which the charter school was not specifically exempted.

The site visit provides the Charter Renewal Applicant School and the CSD an opportunity to clarify and verify information provided by the school in its charter renewal application as well as information provided by the Public Education Department's divisions and bureaus, and, if applicable, the local authorizer from which the charter school may be transferring.

The Renewal Year Site Visit, to be conducted once the renewing charter school has submitted the completed charter renewal application, will also follow up on any outstanding items from the Year 4 Site Visit.

**PROTOCOL FOR CSD**

Each site visit team is comprised of CSD/PED staff and shall follow this common protocol:

- The site visit will be conducted over a one-day period and follow this final protocol, schedule and agenda provided to the school administration no less than 30 days in advance of the site visit.
- CSD/PED staff will review documentation (see checklist below) and other forms of evidence that the school makes available to support the information the school has provided in its charter renewal application.
- CSD/PED staff will facilitate conversations with the school administration, teachers, staff, students, parents, governing council members, and other important stakeholders of the

school to understand the school's success toward meeting the statutory performance expectations for renewal.

- The CSD/PED staff will tour the school and visit classrooms to understand the school's success toward meeting the statutory performance expectations for renewal.
- Before leaving the school at the conclusion of the site visit, the team will meet and debrief with the school administration to review preliminary findings and, if possible, share most likely recommendation.
- After the visit, the team will prepare and send to the school a written report by 11/14/16. The school has the opportunity to respond to the findings of the report, which will form a part of the CSD's final analysis of the school charter renewal application by 5:00 pm on 11/21/16.

### EXPECTATIONS OF THE SCHOOL

The school is responsible for ensuring that the purpose of the site visit, meeting schedules and appointments, and all other site visit expectations made clear to the members of the school community and its stakeholders. The school is also responsible for facilitating representative stakeholder participation in meetings between the site visit team and the school's governing council or members of the governing council, parents, students, and other stakeholders as outlined on the site visit schedule. Please note that a meeting with the governing council may require proper noticing, should a quorum of the council be present.

The site visit team will visit classrooms during the course of the site visit. The purpose of these classroom visits is to observe the ways in which the school's mission is being communicated on a daily basis throughout the school (school purpose, climate and teacher and student engagement) and to verify implementation of NM Common Core and State Standard aligned curriculum, as required by the PEC performance frameworks and NM state law. Team members will not interrupt instruction, but may briefly talk to students or teachers at opportune moments.

### **Please use this checklist to ensure your school is prepared for the site visit.**

#### I. Facilitate representative stakeholder participation in meetings with the site visit team:

##### *a. Communicate Meeting Opportunities to Families*

- Personalize letter template provided by PED with appropriate greeting and signature (school official), site visit date, meeting location and return request date at least 5 days prior to the site visit.
- Provide letter to families of all students; the school should use its regular communication methods.
- At least 3 days prior to the site visit, communicate to PED the expected number of participants in each session.
- Provide confidential meeting space for feedback sessions.

##### *b. Communicate Meeting Opportunities to Teachers*

- Personalize letter template provided by PED with appropriate greeting and signature (school official), site visit date, conditions on teacher participation (examples provided in the template), meeting location and return request date at least 5 days prior to the site visit.
  - Provide letter to all teachers; the school should use its regular communication methods.
  - At least 3 days prior to the site visit, communicate to PED the expected number of participants in each session.
  - Provide confidential meeting space for feedback sessions.
- c. *Communicate Meeting Opportunities to Governing Board*
- Personalize letter template provided by PED with appropriate greeting and signature (school official), site visit date, meeting location and return request date at least 5 days prior to the site visit.
  - Provide letter to all board members; the school should use its regular communication methods.
  - At least 3 days prior to the site visit, communicate to PED the expected number of participants in each session.
  - Provide confidential meeting space for feedback sessions.
- d. *Communicate Meeting Opportunities to Students (if the school wishes)*
- Personalize letter template provided by PED with appropriate greeting and signature (school official), site visit date, meeting location and return request date at least 5 days prior to the site visit.
  - Provide letter to all students; the school should use its regular communication methods.
  - If more students than possible seek to participate, determine student participation through lottery or otherwise random method taking into account student availability/minimizing disruption of educational time.
  - Ensure families of selected students provide permission for students to participate.
  - At least 3 days prior to the site visit, communicate to PED the expected number of participants in each session.
  - Provide confidential meeting space for feedback sessions.
- II. At least 1 week prior to scheduled visit, provide information for PED team to plan for site visit:
- a. Current school year daily schedule, if not on website.
  - b. Current school year school map with teacher names/grade levels.
  - c. Any information you would like CSD to review offsite, prior to site visit.
- III. Determine use of school directed time (8:15 – 9) and prepare accordingly.
- IV. On day of visit, ensure access to all requested documents:
- a. *Documentation to support the entire Renewal Application*

- Academic Performance: Short-cycle assessment data or other data used to supply information in the Charter Renewal Application, **Part B.I.A**, *Mission Specific and/or Student Academic Performance Standards/Goals*;
  - Financial Performance: Supporting documentation data used to supply information in the Charter Renewal Application, **Part B.I.B**, *Audit Report Summary*;
  - Organizational Performance: Supporting documentation used as the basis for the assurances provided in the Charter Renewal Application, **Part B.I.C**, *Organizational Performance*.
- b. *School Calendar and daily schedules (include both full day and half day schedules)*
- c. *Daily Student Attendance Sheet for day of visit that shows all students who are enrolled, present and absent (by grade level and classroom)*
- d. *Evidence of all emergency drills and practiced evacuations conducted this school year*
- e. *A current list of Governing Board members and Governing Body meeting notices, agendas, and minutes (if not available on website) for past 12 months*
- f. *Evidence of posting of meeting notices*
- g. *Employee files including background checks, licensure, and contracts*
- h. *School employee salary schedule(s)*
- i. *Documentation to demonstrate implementation of the school's RTI and SAT processes*
- j. *Documentation to demonstrate implementation of your school's stated mission*
- k. *Student files including:*
- *Documentation to demonstrates implementation of the school's ELL, RTI, SAT, and Special Education processes*
  - *Enrollment and withdrawal forms*
  - *Documentation regarding enforcement of compulsory attendance law, and notification regarding habitual truants*



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SECRETARY OF EDUCATION

SUSANA MARTINEZ  
GOVERNOR

## 2016 State Charter Renewal Site Visit

### Charter Schools Division Team

#### Tentative Agenda

- 8:00 Gather, Introductions & Expectations
- 8:15 -9:00 School Presentation – School Directed Time (Examples: Tour of School, Brief Overview of School, Share the School’s Successes and Challenges, Formal Student or Teacher Presentation)
- 9:00 – 12:00 Conversations with stakeholders (Teachers, Families, Students, Governing Board Members)
- PED will provide an opportunity to receive feedback from students, teachers, families, and the governing board. PED proposes the following schedule, but will accept revisions based on school needs.

9:00 am - 9:15 am: Students	9:15 am - 9:30 am: Teachers	9:30 am-10:00 am: GB members and parents
10:00 am- 10:15 am: Students	10:15 am - 10:30 am: Teachers	10:30 am-11:00 am: GB members and parents
11:00 am- 11:15 am: Students	11:15 am - 11:30 am: Teachers	11:30 am-noon am: GB members and parents

- 9:30 - 12:00 p.m. Application Data Analysis and File Reviews
- 12:00 – 1:00 Break for Lunch
- 1:00 – 3:00 Classroom Visits
- 1:00 – 3:00 Complete data analysis and file reviews
- 3:00 – 5:00 Team meets with Head Administrator/School Leadership to review outstanding items from Year 4 Site Visit Report and the Charter Renewal Application, including Performance Goals

Subject  
Date  
Page #

*(Head Administrator or designee should be available for consultation, questions, etc. throughout the review of documentation):*

## Renewal Site Visit Script

### Renewal Site Visit Introduction – to School Site Leader

Good morning, my name is **Name, Title** at the New Mexico Public Education Department, Charter School Division. **With me is Name, Title**. We are here for the renewal year site visit of **[school name]**. The purpose of our visit is to verify information provided in the renewal application and determine whether the renewal applicant has met the conditions, standards and procedures set forth in the charter contract; met or made substantial progress toward achievement of the department's standards of excellence or student performance standards identified in the charter contract; met generally accepted standards of fiscal management; and complied with all provisions of law from which the charter school was not specifically exempted.

During this visit, we will be looking to verify information provided in the renewal application, checking documents for compliance, making observations of the program of instruction and observing students and staff, interviewing stakeholders, and reviewing your data that supports your academic goals- this was outlined in the letter sent to the school leader.

**[Present document request list and school's agenda]** We will try to follow this agenda as closely as possible. We will begin the day by allowing the school leaders the opportunity to share your school's story- the success and challenges. However, this is optional. After the school's presentation, we will begin our work—we would appreciate if you could provide us with a quiet, secure space to keep our belongings and work with our team members. We will be reviewing student and staff files, observing in classrooms, interviewing stakeholders, and reviewing the items on the requested list and the school's data. During this time, we may need to request additional information and/or explanations from you and your staff.

At the end of the day, we will meet with the school's leader to debrief and discuss next steps.