



Site Visit Rubric: Interim Edition*

September 2020

*This document was produced by the Grand Isle Group for CACSA during the spring and summer of 2020. Given the health crisis, opportunities for input from the field were not ideal. CACSA invites ongoing feedback on this product and recommends treating it as “interim” until additional feedback can be incorporated.

Sample Site Visit Rubric

PURPOSE OF SITE VISIT

The purpose of site visits is to serve as a tool to inform continuous improvement for charter schools and to provide data points in determining a charter school’s standing relative to the authorizer’s compliance and performance requirements. Authorizers conduct site visits on an annual basis, though some review topics and criteria may not apply under certain conditions on a given year.

SITE VISIT PROTOCOL ASSUMPTIONS

The rubric in this document assumes that the authorizer and school under review take the following steps prior to, during, and following the site visit.

TIME	STEPS
Prior to Site Visit	Prior to the Site Visit, the authorizer notifies the school of: <ul style="list-style-type: none"> ● The date on which the site visit will occur, ● The time of both the board interview as well as the school leader interview, ● The documents that the school is required to consolidate into one binder for document review (or folder or other location submitted online, as designated by the authorizer), and ● The criteria according to which the authorizer will evaluate the school during the site visit.
During Site Visit	The site visit itself is made up of the following components (see table below for more detail): <ul style="list-style-type: none"> ● School Walk-Through: The authorizer walks through the school to observe cultural and disciplinary practices as well as to evaluate safety criteria. ● Classroom Observation: The authorizer spends 20-40 minutes, as needed, in the classroom to evaluate instruction, the educational program, and school culture/discipline practices. ● Document Review: The authorizer will conduct a review of all documentation relevant to the school’s educational program, board governance, board legal compliance, and school safety. ● Board Interview: The authorizer will conduct an interview with a member of the board to gather additional information needed on board governance and board legal obligations. ● School Leader Interview: The authorizer will conduct an interview with the school leader to ask any questions that arose during document review and on the school’s educational program.
Following Site Visit	Following the site visit, the authorizer will:

- Share the outcome of the site visit, namely the score the school received on each review topic as well as any next steps related to non-compliance/low scores, as needed, that the authorizer will take.

REVIEW PROTOCOL: Below are the steps required to collect all information needed to evaluate the school on each review topic.

Review Topic	School Walk-Through	Classroom Observation	Document Review	Board Interview	SL Interview
Instruction	✗	✓	✗	✗	✗
Educational Program: Curriculum/Materials	✗	✓	✓	✗	✓
School Culture & Discipline	✓	✓	✓	✗	✗
Board Governance	✗	✗	✓	✓	✗
Board Legal Obligations	✗	✗	✓	✓	✗
Safety	✓	✗	✓	✗	✗
Special Education Files	✗	✗	✓	✗	✓

REVIEW PROTOCOL					
Review Topic	School Walk-Through	Classroom Observation	Document Review	Board Interview	SL Interview
Instruction	✗	✓	✗	✗	✗
	Notes: The individual conducting the site visit will spend 20-40 minutes, as needed, collecting information in accordance with the criteria outlined in the table below. Note the instances in which certain criteria are not applicable.				

INSTRUCTION				
CRITERIA	0	1	2	3
Communicating with Students*	NA	Teacher’s purpose in a lesson or unit is unclear to students.	Teacher’s purpose for the lesson or unit is clear, including where it is located within broader learning.	Teacher makes the purpose of the lesson or unit clear. Discussion of content connects with students’ knowledge and experience. Students contribute to explaining concepts to their peers.
Engaging Students in Learning*	NA	Students are not at all intellectually engaged in significant learning, as a result of inappropriate activities or materials, poor representations of content, or lack of lesson structure.	Students are intellectually engaged throughout the lesson, with appropriate activities and materials, instructive representations of content, and suitable structure and pacing of the lesson.	Students are highly engaged throughout the lesson and make material contributions to the representation of content, the activities, and the materials. The structure and pacing of the lesson allow for student reflection and closure.
Using Assessment in Instruction*	NA	Students do not know the criteria by which their work will be evaluated.	Students are fully aware of the criteria by which their work will be evaluated. Teacher monitors the progress of groups of students in the curriculum,	Students are fully aware of the criteria by which their work will be evaluated. Teachers actively and systematically elicits diagnostic information from

			making limited use of diagnostic prompts to elicit information; feedback is timely, consistent, and of high quality.	individual students regarding understanding and monitors progress of individual students; feedback is timely, high quality, and students use feedback in their learning.
COLUMN TOTALS	0			
TOTAL SCORE	0			

**This does not apply to schools that received a performance rating Meets across academic performance indicators in the previous school year.*

SCORING SCALE: INSTRUCTION	TOTAL
EXEMPLARY	75%+
ACCEPTABLE	51-74%
NEEDS IMPROVEMENT	26-50%
INADEQUATE	0 – 25%

Note that criteria that are not applicable should be excluded from total possible points.

REVIEW PROTOCOL					
Review Topic	School Walk-Through	Classroom Observation	Document Review	Board Interview	SL Interview
Educational Program: (1) Curriculum & Materials; (2) Special Education	✗	✓	✓	✗	✓
	Notes: <ul style="list-style-type: none"> • Prior to Site Visit: The school leader will consolidate all information relevant to the school's curriculum, assessments, ELA programming, and Special Education programming in a binder for document review. • SL Interview: The individual conducting the site visit will reserve a portion of the school leader interview to ask any questions that arose during document review necessary to evaluate the school according to the criteria outlined below. 				

EDUCATIONAL PROGRAM: CURRICULUM & MATERIALS				
CRITERIA	0	1	2	3
Curriculum	NA	The school does not have research-based, Common Core/CAS aligned curricula in place.	All criteria for partially meets expectations plus: Common Core/CAS- aligned curricula and resources extend into intervention, special education, acceleration, the arts, and PE.	All criteria for meets expectations plus: The school has tailored their curriculum to meet the needs of the particular student population, including the inclusion of culturally relevant materials.

<p>Assessment</p> <p><i>This does not apply to schools that received a performance rating</i> Meets across academic performance indicators in the previous school year.</p>	<p>NA</p>	<p>The school does not have a system to administer interim assessments or use the data to inform instruction and identify students in need of support. There is not a protocol for data analysis or norms for teacher collaboration on assessment and grading. Students are not provided with appropriate accommodations for language and/or learning needs that guarantee equitable access to assessments.</p>	<p>All criteria for partially meets expectations plus: There is a clear process for ensuring assessments are aligned with curriculum, standards, and performance goals. The school has clear graduation and promotion criteria are consistently applied.</p>	<p>All criteria for meets expectations plus: Students are able to articulate their goals and performance toward meeting those goals.</p>
<p>Academic Intervention and Acceleration</p> <p><i>This does not apply to schools that received a performance rating</i> Meets across academic performance indicators in the previous school year.</p>	<p>NA</p>	<p>The school provides limited supports for students who are struggling academically or in need of acceleration. The RTI process is not systematically structured to assist all learners in need of intervention.</p>	<p>All criteria for partially meets expectations plus: There are clear procedures for identifying gifted and talented and academically advanced students. There are sufficient research-based resources and strategies available to provide services to students in need of intervention/ acceleration.</p>	<p>All criteria for meets expectations plus: The school collects data to inform and regularly evaluate the effectiveness of academic intervention and acceleration programming.</p>
<p>English Language Acquisition</p>	<p>NA</p>	<p>Observed content instruction does not demonstrate explicit strategies to effectively meet the needs of ELL</p>	<p>Observed content instruction meets the needs of all ELL students. Instruction explicitly</p>	<p>All criteria for meets expectations plus: Strategies and supports utilized for ELL</p>

		students. Observed ELD instruction “Does Not Meet Expectations” on the ELD observation rubric from the Charter ELA Teacher Training Channel. The focus of the lesson is on content, not on language.	addresses academic language and vocabulary and teachers provide regular opportunities for students to practice language orally and/or in writing.	students (in ELD or content classes) are monitored on an ongoing basis for effectiveness.
Cultural Competency	NA	The school has not provided training or support to staff on cultural competency and/or there is evidence of a lack of cultural competency across the school. Curriculum does not represent the cultural background and/or experiences of students within the school.	Teachers have received PD on cultural competency that they utilize in their classrooms.	All criteria for meets expectations plus: Teachers encourage students to challenge and question the dominant culture and students appear comfortable doing so in respectful ways.
COLUMN TOTALS	0			
TOTAL SCORE	0			

SCORING SCALE: EDUCATION PROGRAM - CURRICULUM & MATERIALS	TOTAL
EXEMPLARY	75%+
ACCEPTABLE	51-74%
NEEDS IMPROVEMENT	26-50%
INADEQUATE	0 – 25%
Note that criteria that are not applicable should be excluded from total possible points.	

EDUCATIONAL PROGRAM: SPECIAL EDUCATION				
CRITERIA	0	1	2	3
Special Education Instruction	NA	Observed Special Education instruction and instructional environment provides minimal access to the appropriate Grade Level Standards or Extended Evidence Outcomes such as through accommodations, specially designed instruction, etc.	Observed Special Education instruction and instructional environment provide meaningful access to the appropriate Grade Level Standards or Extended Evidence Outcomes such as through accommodations, specially designed instruction, etc.	All criteria for meets expectations plus: instruction results in quality of programming that exceeds compliance standards.
IEP Development	NA	Systems for developing IEPs do not result in a clear connection between the strengths and needs identified in the present levels, goals, and the service delivery statement. There are minimal systems to collect progress monitoring data.	Systems for developing IEPs result in strong connections and alignment between the strengths and needs identified in the present levels, goals, and the service delivery statement. There is a clear system in place to collect progress monitoring data with fidelity, including evidence of student progress and growth. The information is consistently used to adjust the type or intensity of supports when students do not respond to current interventions.	All criteria for meets expectations plus: systems result in quality of programming that exceeds compliance standards.

Professional Development	NA	The school does not have a calendar of professional development activities that explicitly train teachers to modify the curriculum and instruction to address the unique needs of students with disabilities.	NOT APPLICABLE	The school provides a calendar of professional development activities that explicitly train teachers to modify the curriculum and instruction to address the unique needs of students with disabilities.
Assessment	NA	The school cannot provide evidence of modified forms of assessment and progress monitoring for students with disabilities.	NOT APPLICABLE	Reflecting the supports provided in their IEPs, administration of assessment incorporates the same supports and accommodations students with disabilities receive in the classroom. Aside from formally required assessments, including alternate assessments for students with the most significant cognitive disabilities, schools identify other metrics to measure and evaluate the progress of students with disabilities.
COLUMN TOTALS	0			
TOTAL SCORE	0			

SCORING SCALE: SPECIAL EDUCATION	TOTAL
EXEMPLARY	75%+
ACCEPTABLE	51-74%
NEEDS IMPROVEMENT	26-50%
INADEQUATE	0 – 25%

Note that criteria that are not applicable should be excluded from total possible points.

REVIEW PROTOCOL					
Review Topic	School Walk-Through	Classroom Observation	Document Review	Board Interview	SL Interview
School Culture & Discipline	✓	✓	✓	✗	✗
	Notes: The individual conducting the site visit will spend 20-40 minutes, as needed, collecting information in accordance with the criteria outlined in the table below. Note the instances in which certain criteria are not applicable.				

SCHOOL CULTURE & DISCIPLINE				
CRITERIA	0	1	2	3
Discipline Policy	NA	Policies regarding student discipline, expulsion, and suspension satisfy one or none of the following conditions: (1) they are consistent with the intent and purpose of Colorado Revised Statutes Title 22. Education § 22-33-106; (2) they provide adequately for the safety of students and staff; and (3) they provide a level of due process for students that, at a minimum, complies with the requirements of the federal "Individuals with Disabilities Education Act."	Policies regarding discipline, expulsion, and suspension satisfy two of the conditions listed to the left.	Policies regarding discipline, expulsion, and suspension satisfy all of the conditions listed to the left.
Establishing a Culture for Learning*	NA	The classroom does not represent a culture for learning and is characterized by low	The classroom environment represents a genuine culture for learning, with commitment to	Students assume much of the responsibility for establishing a culture for learning in the

		teacher commitment to the subject, low expectations for student achievement, and little student pride in work.	the subject on the part of both teacher and students, high expectations for student achievement, and student pride in work.	classroom by taking pride in their work, initiating improvements to their products, and holding the work to the highest standard.
Classroom Procedures*	NA	Routines and procedures are seamless in their operation, and students assume considerable responsibility for their smooth functioning.	Routines and procedures have been established and function smoothly for the most part, with little loss of instruction time.	Routines and procedures are seamless in their operation, and students assume considerable responsibility for their smooth functioning
Managing Behavior*	NA	Student behavior is poor, with no clear expectations, no monitoring of student behavior, and inappropriate response to student misbehavior.	Teacher is aware of student behavior, has established clear standards of conduct, and responds to student misbehavior in ways that are appropriate and respectful of the students.	Student behavior is entirely appropriate, with evidence of student participation in setting expectations and monitoring behavior. Teacher's monitoring of student behavior is subtle and preventive, and teachers' response to student misbehavior is sensitive to individual student needs.
COLUMN TOTALS	0			
TOTAL SCORE	0			

*This does not apply to schools that received an exemplary rating in their previous site visit.

SCORING SCALE: CULTURE & DISCIPLINE	TOTAL
EXEMPLARY	75%+
ACCEPTABLE	51-74%
NEEDS IMPROVEMENT	26-50%
INADEQUATE	0 – 25%
Note that criteria that are not applicable should be excluded from total possible points.	

REVIEW PROTOCOL					
Review Topic	School Walk-Through	Classroom Observation	Document Review	Board Interview	SL Interview
Board Governance	✗	✗	✓	✓	✗
	Notes: <ul style="list-style-type: none"> • Prior to Site Visit: The school leader will consolidate all information relevant to the board governance criteria outlined below in a binder for document review. • Board Interview: The individual conducting the site visit will reserve a portion of the board interview to ask any questions that arose during document review necessary to evaluate the school according to the criteria outlined below. 				

BOARD GOVERNANCE				
CRITERIA	0	1	2	3
The charter school has adopted and implemented conflict of interest policies that prevent real or apparent conflicts of interest.	NA	The charter school has not adopted and implemented conflict of interest policies that prevent real or apparent conflicts of interest.	NOT APPLICABLE	The charter school has adopted and implemented conflict of interest policies that prevent real or apparent conflicts of interest.
The charter school administration provides monthly financial reports to its governing board for review and approval.	NA	The charter school administration does not provide monthly financial reports to its governing board for review and approval.		The charter school administration provides monthly financial reports to its governing board for review and approval.
Academic Oversight	NA	The Board does not receive sufficient data on the school's academic performance to understand how the school is performing.		The Board has members with expertise in E-12 education, and all Board members are able to understand student achievement data. Student achievement metrics, both interim and summative, are

			regularly monitored by the Board.	
Financial Oversight	NA	The Board does not regularly monitor the school's financial performance.	All criteria for partially meets expectations plus: The Board has members with finance expertise, and all Board members are able to understand budgets, audits, and development. The Board sets and regularly monitors progress towards financial goals.	All criteria for meets expectations plus: The Board sets and monitors progress towards financial goals that are related to the school's long term financial health.
Operational Oversight	NA	The Board does not monitor operational metrics – such as facilities, transportation, school culture, and enrollment metrics as appropriate for the school – or does not use data to inform decision-making.	The Board has members with expertise in school operations, and all Board members are able to understand operational data. The Board sets goals around relevant operations systems and regularly monitors these goals.	All criteria for meets expectations plus: The Board receives annual PD on relevant operational data.
Human Capital Oversight	NA	The Board has not discussed future leadership plans. There is not a job description for the school leader or a formal plan for corrective action and performance improvement, if needed. The school leader does not receive an annual evaluation.	The Board has a leadership succession plan in place to ensure consistency in implementing the mission and vision of the school during transition of leadership. The Board evaluates the school leader at least annually.	All criteria for meets expectations plus: There is a strong plan for developing/maintaining a school leader pipeline, including both internal candidate development and external partnerships for leadership development.
Strategic Planning	NA	The Board does not engage in strategic planning and spends the majority of its	The Board regularly engages in strategic planning to influence the school's short and long term direction as	All criteria for meets expectations plus: The Board has a formal long term strategic plan that is revisited

		time on reactive conversations and decision.	appropriate for its stage of development. The Board spends the majority of its time on strategic conversation and decisions that are key at its stage of development, as opposed to reactive conversations and decisions.	and revised as needed on an annual basis.
COLUMN TOTALS	0			
TOTAL SCORE	0			

SCORING SCALE: GOVERNANCE	TOTAL
EXEMPLARY	75%+
ACCEPTABLE	51-74%
NEEDS IMPROVEMENT	26-50%
INADEQUATE	0 – 25%
Note that criteria that are not applicable should be excluded from total possible points.	

REVIEW PROTOCOL					
Review Topic	School Walk-Through	Classroom Observation	Document Review	Board Interview	SL Interview
Board Legal Obligations	✗	✗	✓	✓	✗
	Notes: <ul style="list-style-type: none"> • Prior to Site Visit: The school leader will consolidate all information relevant to the board governance criteria outlined below in a binder for document review. • Board Interview: The individual conducting the site visit will reserve a portion of the board interview to ask any questions that arose during document review necessary to evaluate the school according to the criteria outlined below. 				

BOARD LEGAL OBLIGATIONS		
ITEM	MET (1)/NOT MET(0)	NOTES
Bylaws in place that outline board role and legal obligation		
Articles of incorporation in place that indicate current nonprofit status		
Board handbook in place that outlines board member expectations		
Financial transparency compliance		
Financial reporting compliance		
Board complies with open meetings requirements , including appropriate use of executive session and publication of minutes		

Board holds meetings (at least quarterly)		
Regular revision and approval of key policies (employment, enrollment, etc.)		
Approval of annual audit		
Approval of annual budget		
Board meets authorizer deadlines and requirements		
COLUMN TOTALS	0	

SCORING SCALE: BOARD LEGAL OBLIGATIONS	TOTAL
EXEMPLARY	75%+
ACCEPTABLE	51-74%
NEEDS IMPROVEMENT	26-50%
INADEQUATE	0 – 25%
Note that criteria that are not applicable should be excluded from total possible points.	

Review Topic	School Walk-Through	Classroom Observation	Document Review	Board Interview	SL Interview
Safety	✓	✗	✓	✗	✗
	<ul style="list-style-type: none"> • School Walk-Through: The authorizer will confirm that any signage indicated in both plans listed below are current and posted throughout the school. • Prior to Site Visit: The school leader will consolidate all information relevant to the school safety criteria outlined below in a binder for document review. 				

SCHOOL SAFETY				
CRITERIA	0	1	2	3
The school presents current (dated within calendar year) plans to respond to inclement and/or severe weather.	NA		NOT APPLICABLE	
The school presents current (dated within calendar year) plans to protect and/or evacuate students as appropriate in the instance of an emergency.	NA			
COLUMN TOTALS	0			
TOTAL SCORE	0			

SCORING SCALE: SCHOOL SAFETY	TOTAL
MEETS EXPECTATIONS	4-6
INADEQUATE	0-3

Review Topic	School Walk-Through	Classroom Observation	Document Review	Board Interview	SL Interview
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Special Education Files	✗	✗	✓	✗	✓
	Notes: <ul style="list-style-type: none"> • Document Review: The authorizer will select three special education files at random during document review and will evaluate those files using the forms below. The school leader shall not pull these files in advance of the site visit. • School Leader Interview: The authorizer will raise any related questions or concerns during the school leader interview. • Scoring: DISCUSS 				

Student A Name:		Grade Level:		Exceptionality:	
Folder Contents	Requirement	Outcome of Review (Compliant = 1; Not Compliant = 0)		Notes	
IEP Date	IEP dated within one calendar year	<input type="checkbox"/> Compliant <input type="checkbox"/> Not Compliant <input type="checkbox"/> Other			
Evaluation Date	Evaluation or waiver dated within 3 years	<input type="checkbox"/> Compliant <input type="checkbox"/> Not Compliant <input type="checkbox"/> Other			
IEP Compliance with Evaluation	Student exceptionality on IEP aligns with evaluation	<input type="checkbox"/> Compliant <input type="checkbox"/> Not Compliant <input type="checkbox"/> Other			
IEP Signatures	IEP is signed by all required parties	<input type="checkbox"/> Compliant <input type="checkbox"/> Not Compliant <input type="checkbox"/> Other			
Service Minutes Provided	Evidence of service minutes provided in accordance with current IEP for previous and current semester (or since IEP creation/date)	<input type="checkbox"/> Compliant <input type="checkbox"/> Not Compliant <input type="checkbox"/> Other			
Progress Reports	Most recent 2 progress reports are present in the folder and signed by parent	<input type="checkbox"/> Compliant <input type="checkbox"/> Not Compliant <input type="checkbox"/> Other			
Total Points					

Student B Name:		Grade Level:	Exceptionality:	
Folder Contents	Details	Outcome of Review (Compliant = 1; Not Compliant = 0)		Notes
IEP Date	IEP dated within one calendar year	<input type="checkbox"/> Compliant <input type="checkbox"/> Not Compliant <input type="checkbox"/> Other		
Evaluation Date	Evaluation or waiver dated within 3 years	<input type="checkbox"/> Compliant <input type="checkbox"/> Not Compliant <input type="checkbox"/> Other		
IEP Compliance with Evaluation	Student exceptionality on IEP aligns with evaluation	<input type="checkbox"/> Compliant <input type="checkbox"/> Not Compliant <input type="checkbox"/> Other		
IEP Signatures	IEP is signed by all required parties	<input type="checkbox"/> Compliant <input type="checkbox"/> Not Compliant <input type="checkbox"/> Other		
Service Minutes Provided	Evidence of service minutes provided in accordance with current IEP for previous and current semester (or since IEP creation/date)	<input type="checkbox"/> Compliant <input type="checkbox"/> Not Compliant <input type="checkbox"/> Other		
Progress Reports	Most recent 2 progress reports are present in the folder and signed by parent	<input type="checkbox"/> Compliant <input type="checkbox"/> Not Compliant <input type="checkbox"/> Other		
Total Points				

Student C Name:		Grade Level:	Exceptionality:	
Folder Contents	Details	Outcome of Review (Compliant = 1; Not Compliant = 0)		Notes
IEP Date	IEP dated within one calendar year	<input type="checkbox"/> Compliant <input type="checkbox"/> Not Compliant <input type="checkbox"/> Other		
Evaluation Date	Evaluation or waiver dated within 3 years	<input type="checkbox"/> Compliant <input type="checkbox"/> Not Compliant <input type="checkbox"/> Other		
IEP Compliance with Evaluation	Student exceptionality on IEP aligns with evaluation	<input type="checkbox"/> Compliant <input type="checkbox"/> Not Compliant <input type="checkbox"/> Other		

IEP Signatures	IEP is signed by all required parties	<input type="checkbox"/> Compliant <input type="checkbox"/> Not Compliant <input type="checkbox"/> Other	
Service Minutes Provided	Evidence of service minutes provided in accordance with current IEP for previous and current semester (or since IEP creation/date)	<input type="checkbox"/> Compliant <input type="checkbox"/> Not Compliant <input type="checkbox"/> Other	
Progress Reports	Most recent 2 progress reports are present in the folder and signed by parent	<input type="checkbox"/> Compliant <input type="checkbox"/> Not Compliant <input type="checkbox"/> Other	
Total Points			

SCORING SCALE: SPECIAL EDUCATION FILES	TOTAL
EXEMPLARY	75%+
ACCEPTABLE	51-74%
NEEDS IMPROVEMENT	26-50%
INADEQUATE	0 – 25%
Note that criteria that are not applicable should be excluded from total possible points.	