IDAHO
DIAGNOSTIC SITE VISIT PROTOCOL
2020

BOISE STATE UNIVERSITY
IDAHO POLICY INSTITUTE

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EXECUTIVE SUMMARY

Diagnostic site visits are a common evaluation tool for schools across the United States. The goal of site visits is to provide schools with a comprehensive third-party evaluation of policies and practices that impact school quality beyond test scores and assist in school improvement planning. The following report contains a protocol for conducting diagnostic site visits in the state of Idaho.

The report is based on the standards to be evaluated during the site visits: faculty and staff, curriclum and instruction, communication and culture, governance, and finance.

Also included are:

- Methods of standard evaluation
- Evaluation reporting expectations
- Evidence of standard indicators
- Scoring sheets and key
- Interview question examples

INTRODUCTION

Diagnostic site visits are a common evaluation tool for schools across the United States. The goal of site visits is to provide schools with a comprehensive third-party evaluation of policies and practices that impact school quality beyond test scores and assist in school improvement planning.

Bluum, an education non-profit in Idaho, contracted with Boise State University's Idaho Policy Institute (IPI) to create a protocol for conducting site visits in Idaho. This Idaho-specific protocol is based on the structure of other currently existing site visit tools. The tools drawn from are evidence-based and research-focused.

The Idaho site visit protocol includes five standards broken down into indicators. These standards are designed to measure all aspects of school operation. However, the protocol can be adjusted to match specific school needs and concerns before conducting each site visit. Reports generated from the site visit should provide suggestions to help schools improve and function efficiently as well as next-step planning tools for school leadership.

STANDARDS

The protocol includes five comprehensive standards: faculty and staff, curriculum and instruction, communication and culture, governance, and finance. The indicators for each are listed below (examples of evidence for each indicator are in Appendix A). Site visits may cover all five standards or only the standards schools feel are most relevant to their improvement goals.

FACULTY AND STAFF

1. Teachers and school leadership establish and maintain a schoolwide dialogue
2. School leadership use a transparent, clearly defined, and fully implemented system of evaluation to routinely monitor classroom instruction and provide ongoing and meaningful feedback.
3. School leadership models and expects professionalism.
4. School administrators hold staff accountable for instruction and growth.
5. School administrators promote a culture of collaboration.
6. Teacher teams collaborate with grades and content areas to ensure horizontal collaboration.
7. Teachers in and across schools participate in vertical collaboration.
8. Instructional staff engages in intentional, research-based, ongoing, and job-embedded professional learning opportunities that address the needs of students and staff.
9. Administrators support professional learning for teachers.
10. The school provides support to staff members to maintain and extend their capacity

to contribute effectively to student learning and school improvement.

CURRICULUM AND INSTRUCTION

1. The school uses indicators of mastery to describe types and levels of performance expected at each grade level.
2. Formal and informal assessments are used to predict student performance, extend student learning, monitor and adjust curriculum and instruction practices, and identify and address group or individual needs.
3. Teachers provide students with regular, specific, and timely descriptive feedback.
4. Teachers feel an urgency/responsibility for students to demonstrate mastery and ensure that students meet grade-level expectations.
5. Teachers incorporate an understanding of how students learn and adjust, clarify, or re-frame instructional strategies, routines, or content in a timely way to ensure all students are mastering required learning.
6. Teachers and staff provide opportunities for students performing at grade level and beyond to ensure their learning is challenging, engaging, and sustained.
7. Teachers ensure that students' participation is active, purposeful, and thoughtful.
8. Instructional planning is learner-centered and emphasizes the relevance and application of acquired knowledge and skills to real-world situations.
9. Planning ensures teachers have sufficient time, materials, and instructional tools to teach the curriculum so students can learn the content and perform at mastery level.
10. Curriculum and resources are allocated based on need to ensure all students have equal access to viable curriculum.
11. Tiered support is an integral part of a rigorous, ongoing teaching/learning cycle and the school uses clear criteria and processes for making decisions regarding the level and length of student participation in tiered supports.

COMMUNICATION AND CULTURE

1. The school provides culturally and linguistically appropriate school-home communication.
2. Collaborative partnerships with families and the community are cultivated and emphasize shared responsibility for the success of students.
3. School staff and leadership prioritize establishing positive and trusting relationships with families.
4. Teachers collect and analyze student performance data.
5. Common processes, systems, protocols, and language for analyzing data are used by school leadership and instructional staff continuously.
6. Interim and summative assessments provide information on student mastery and progress over time.
7. School leadership and staff regularly collect and analyze multiple types of data.

8. Student behavioral expectations are well defined, posted in a variety of settings, and clearly communicated to and understood by students and families.
9. School administrators ensure a safe and well-organized environment for staff and students throughout the school campus.
10. The school demonstrates a welcoming and inviting learning environment for all staff, students, families, and community members.
11. The school offers a range of extended learning opportunities within and beyond the school day.
12. School leadership facilitates and identifies priorities for improvement efforts guided by and understanding of change processes.
13. School leadership establishes and sustains focus on continuously improving student achievement while effectively motivating and encouraging teachers and minimizing factors that distract from the goal.

GOVERNANCE

1. The board and lead administrator have different responsibilities determined by the board.
2. The board provides oversight to ensure consistent implementation of the vision and mission throughout the school and ensure the vision and mission are communicated publicly to stakeholders and the community.
3. The board has created or adopted a comprehensive list of policies and processes through the strategic planning process.
4. The board engages in policy-driven leadership by consistently adhering to its policy manual.
5. Board members are highly engaged in fulfilling their board roles and expectations that are clearly defined and understood.
6. The board complies with and creates policies and processes to involve internal and external stakeholders.

FINANCE

1. The school budget and revenue projections are realistically based on guaranteed revenue streams including enrollment.
2. The school operates with and regularly monitors a balanced budget.
3. School is effectively funded by approved sources.
4. The board reviews any audits and board financial statements.
5. Annual and long-term budgets are developed and monitored by administration and board finance committee and consider input from stakeholders.
6. The school proactively and effectively adjusts the budget to reflect changes in current enrollment and per pupil revenue funding.
7. The board has recruited highly knowledgeable board members with financial

expertise.

8. Aligned to state statutes, the board has adopted a comprehensive set of regularly reviewed policies outlining the process for budget development, revision, approval, submission to the authorizer, and ongoing mentoring.
9. The school has established complete financial autonomy from the authorizer and/or Educational Management Organization.

EVALUATION METHODS AND MEASURES

Each indicator is measured using a four-level rating system with the scale: minimally, partially, generally, and fully implemented. Indicator rankings reflect the amount of times an indicator is observed during the site visit (examples of scoring sheets are in Appendix B).

Site visits are structured to thoroughly understand the function of a school with minimal disruptions to student learning. Evaluations are completed by observing classrooms, reviewing school governance and finance documents, and interviewing relevant stakeholders. Stakeholders include teachers, staff, administration, board members, students, and parents (examples of interview questions are in Appendix C).

REPORTING

Site visit observations and subsequent indicator ratings will result in a report delivered to the school. The report will inform schools of relevant policies and practices that are impacting school quality.

Areas where the school is excelling will be highlighted, but the emphasis of the report will be the areas that need the most growth. Schools will be given evidenced-based recommendations for improvement in these areas as well as instructions for next step planning. Evaluators will also work with school leaders to create these next step plans. Plans will focus on retaining current areas of excellence while improving low scoring indicators. All plans will include an aspect of accountability to ensure that the plans are executed.

Data collected from site visits at multiple schools will be used to identify possible patterns in policies and practices of quality schools. Areas of excellence will be compared with traditional and non-traditional measures of quality, including performance of students on standardized tests and student perceptions. These characteristics will be compiled with school improvement planning resources to create an aid for schools wanting to increase their quality.

CONCLUSION

School quality is often determined strictly by test scores. Site visits allow schools to be evaluated qualitatively to better understand the policies and practices of schools that best serve students. Visits can assist schools across Idaho participate in school improvement

planning. This protocol is designed to evaluate schools holistically and provide evidence-based actions for improvement.

APPENDIX A

EXAMPLE EVIDENCE FOR INDICATORS

FACULTY AND STAFF

1. Teachers and school leadership analyze and understand:
    - Academic standards and expectations for their grade level and/or content areas
    - The purpose of each assessment (i.e. screening, diagnosing, progress monitoring, measuring achievement
    - Shared vision of high expectation for academic and behavioral performance of students
    - Standards, instruction, and assessment with a focus on integrating the use of research-based practices
    - Leadership distributions to foster shared ownership of school success
    - Coherent common research-based practices for the teaching/learning cycle
    - Intentionally align decisions, actions, and initiatives to the school's mission and goals
2. School leadership use a transparent, clearly defined, and fully implemented system of evaluation to routinely monitor classroom instruction and provides regular and meaningful ongoing feedback to ensure:
    - Teachers provide effective instruction.
    - Teachers develop standards-based lessons
    - Teachers use high quality assessment practices.
    - Teachers effectively deliver tiered supports with fidelity
    - Improved performance related to job responsibilities and growth goals
3. School leadership models and expects similar professionalism while:
    - Being visible and accessible in classrooms
    - Implementing supervision and evaluation processes
    - Promoting teacher leadership within the school
    - Clarifying roles and responsibilities
    - Establishing, communicating and implementing decision-making processes
    - Recruiting quality teachers
4. School administrators hold staff accountable for instruction and growth by:
    - Intentionally modeling the importance of continued adult learning
    - Ensuring training and mentoring to low-performing teachers
    - Collaborating with staff to develop growth goals
    - Providing clear and specific expectations for implementing new skills and practices
    - Building staff efficacy
5. Teacher teams collaborate within grades and content areas to:
    - Ensure consistency of planning and practice
    - Evaluate the impact of classroom instruction on student learning
    - Engage in data dialogue with time scheduled by administrators
    - Determine common assessments and scoring guides
6. Teachers in and across schools collaborate to:
    - Ensure no gaps or unnecessary overlaps in curriculum
    - Clarify expectations and key transition points
    - Integrate support structures and programs (i.e. Title I, ESL, & Special Education) to support

student learning
    - Create networks with stakeholders & outside entities to support improvement efforts
    - Coordinate and align curriculum across academic programs (i.e. Special Education & Gifted Education)
7. School administrators promote a culture of collaboration scheduling time to allow teachers:
    - Incorporate common elements in their planning
    - Use aligned curricular documents and other tools
    - Have a common understanding of a standards-based teaching and learning cycle
    - Implement a rigorous cycle of teaching and learning that guides practices and process for systemic implementation
8. Instructional staff engages in intentional, research based, ongoing and job-embedded professional learning opportunities that address the needs of students and adults to:
    - Initiate and refine standards-based instructional planning
    - Improve teaching and learning
    - Enhance and refine assessment practices (i.e. interpreting data, participating in data dialogue)
    - Improve implementation of tiered academic behavioral supports
    - Implement practices that support equity and an understanding of diversity
    - Promote independent and group reflection that enables teachers to share innovations and revise classroom practices
9. Administrators support professional learning for teachers by:
    - Protecting time for collaboration
    - Implementing a strategic approach to staff assignments
    - Ensuring new knowledge, skills and practices are effectively implemented
    - Evaluating professional learning for relevance in improving professional practice
    - Differentiating professional learning to support professional growth
10. The school provides support to staff members to maintain and extend their capacity to contribute effectively to student learning and school improvement to help retain current and support new staff through well-trained and knowledgeable mentors and coaches.

CURRICULUM AND INSTRUCTION

1. The school uses indicators of mastery to describe types and levels of performance expected at each grade level that:
    - Teachers communicate using models, rubrics, checklists, etc.
    - Students know and can articulate
    - Communicate high expectations that motivate students (i.e. “no excuses, problem solving, etc.)
    - Demonstrate a commitment to equity (each student is expected to master expectations regardless of culture, ability, etc.
2. Formal and informal assessments (including homework) are used to predict student performance, extend student learning, monitor and adjust curriculum and instruction practices and identify and address group or individual needs and are periodically reviewed to ensure alignment to grade-level expectations and learning targets. Teachers ensure students understand the purpose of these assessments.
3. Teachers provide students with regular, specific, and timely descriptive feedback to help them improve their performance by setting learning goals to improve their understanding of how they learn. Quality work is used as examples and celebrated.
4. Teachers feel an urgency/responsibility for students to demonstrate mastery and ensure that students meet grade-level expectations by:
    - Providing instruction that emphasizes concepts and skills needed for mastery
    - Allowing students to self-evaluate their performance in relation to rubrics and feedback

- Using backwards design when planning (starting with mastery criteria)
- Providing students with multiple opportunities to demonstrate mastery
- Holding students accountable for producing quality work

5. Teachers incorporate an understanding of how students learn and adjust, clarify, or re-frame instructional strategies, routines, or content in a timely way to ensure ALL students are mastering required learning by:
    - Ensuring equitable and challenging learning experiences while planning (i.e. scaffolding)
    - Conducting regular checks for understanding or formative assessment
    - Designing a progression of learning
    - Placing a focus on best first instruction
6. Teachers and staff provide opportunities for students performing at grade level and beyond to ensure their learning is challenging, engaging, and sustained by:
    - Providing and implementing a continuum of evidence-based supplementary instruction and intervention
    - Ensuring interventions are provided for both remediation and advanced needs systematically, timely, and intentionally
    - Providing at least three tiers of support for intervention (RTI) including targeted/supplemental and intensive support
    - Ensuring these interventions are provided for students performing below mastery to *supplement* classroom instruction
7. Teachers ensure that student participation is active, purposeful, and thoughtful by:
    - Encouraging students to develop self-efficacy and to persist when faced with a challenging task.
    - Incorporating 21st century skills (i.e. collaboration, critical thinking, etc.) in planning
    - Including high expectations and academic rigor for all students
    - Evaluating student learning at a level of rigor comparable to cognitive/performance level required by the standards being assessed
8. Instructional planning is learner-centered and emphasizes the relevance and application of acquired knowledge and skills to real-world situations and provides each student with multiple opportunities to apply background knowledge, correct misconceptions, and engage in deliberate meaningful practice as new learning is acquired
9. Planning ensures teachers have sufficient time, materials, and instructional tools to teach the curriculum so students can learn the content and perform at mastery level. Teachers use a variety of and there is a sufficient amount of instructional resources that maximize school effectiveness.
10. Curriculum resources are allocated based on need to ensure all student have equal access to viable curriculum. Teachers understand the different purposes of curriculum and instructional programs/ materials and use both appropriately in instructional planning by:
    - Maximizing learning time providing bell-to-bell instruction
    - Using linguistic strategies to assist non-English-speaking and limited English proficiency.
    - Using student-friendly language so students understand learning targets, performance requirement and assessment results
11. Tiered support is an integral part of a rigorous, ongoing teaching/learning cycle and the school uses clear criteria and processes for making decisions regarding level and length of student participation in tiered supports. For example:
    - Tier II extended enrichment opportunities are available for students performing above mastery to supplement their classroom instruction.
    - Tier III interventions are provided with sufficient time, intensity, and frequency to meet individual remedial needs of students at the highest risk of failure or dropping out of school.
    - Tier III interventions are provided with sufficient time, intensity, and frequency to specifically meet individual student advanced needs.

COMMUNICATION AND CULTURE

1. The school provides culturally and linguistically appropriate school-home communication focused on ways for families to support student learning and engaged communications and conversations with all stakeholders in timely, clear and convenient ways. Students are involved in reporting their progress to families. Reports home include standards, grade-level expectations and summative assessment results.
2. Collaborative partnerships with families and the community are cultivated and emphasize shared responsibility for the success of students. Families are active participants in identifying concerns and implementing actions to support positive student outcomes and have opportunities to support student learning. Activities which result in meaningful family and community engagement, support, and ownership of the school.
3. School staff and leadership prioritize establishing positive and trusting relationships with families by making themselves available to work with families in addressing student needs and providing external support services (i.e. health and social services).
4. Teachers use and analyze student work data to:
    - Evaluate the effectiveness of and plan/modify instruction
    - Identify student learning and needs
    - Ensure learning is accelerated or enriched as intended.
5. Common processes, systems, protocols, and language for analyzing data are used by school leadership and instructional staff continuously to:
    - Efficiently manage, disaggregate, display and report multiple types of data
    - Obtain information on student learning achievement gaps, and instruction from external sources
    - Determine patterns of student achievement, growth, and changing in growth
    - To improve student achievement
6. Interim and summative assessments provide information on student mastery and progress over time and help evaluate the effectiveness of instructional practices and programs, helping guide decisions regarding the need for additional interventions. These data-informed decisions are evaluated routinely.
7. School leadership and staff regularly collect and analyze multiple types of data (i.e., student learning, demographic, process, perception) to:
    - Plan and revise school improvement efforts including development of the UIP
    - Deliver intervention models/programs/strategies that meet the individual learning needs of students
    - Help evaluate the effectiveness of school culture and climate
8. Student behavioral expectations are well defined, posted in a variety of settings, and clearly communicated to and understood by students and families:
    - Expectations are equitably applied, taught, and reinforced by staff members to ensure that each student is a successful member of the school learning community.
    - School leadership uses conflict management and resolution strategies to enforce schoolwide behavioral expectations consistently and appropriately.
    - Staff members use praise and positive reinforcement to motivate students to high levels of behavior and academic performance.
9. School administrators ensure a safe and well-organized environment for staff and students throughout the school campus by establishing clear schoolwide expectations and procedures and ensuring their implementation with fidelity. The physical structures and condition of the school provide students and staff members with a safe, healthy, and orderly learning environment.
10. The school demonstrates a welcoming and inviting learning environment for all staff, students, families, and community members by:
    - Valuing diversity and demonstrating knowledge and skills needed to work with diverse cultures and ethnicities
    - Promoting understanding of and respect for all cultural backgrounds in the learning environment
    - Setting the establishment of positive and trusting student/adult relationships as a priority

- Respectfully considering the perspectives of others
- Valuing and publicly celebrating school, staff and student success

11. The school offers a range of extended learning opportunities within and beyond the school day including information literacy and routine access to available technology and makes an effort to involve students from all sub-groups in all academic and extra-curricular activities
12. School leadership facilitates and identifies priorities for improvement efforts guided by an understanding of change processes shown through:
    - Applying systems thinking to support school improvement efforts.
    - Effectively aligning improvement efforts with other school priorities and adjusted as needed.
    - Using a collaborative process to develop, implement, and monitor the CIP
    - Taking ownership for the implementation and outcomes of the CIP.
    - Regularly monitoring and adjusting implementation of the CIP based on performance targets, interim measures, and implementation benchmarks.
    - Addressing prioritized performance challenges in a way that will result in significant improvements in student learning.
13. School leadership establishes and sustains focus on continuously improving student achievement while effectively motivating and encouraging teachers to and minimizing factors that distract from the goal. The school vision and mission for student success are collaboratively developed based on the beliefs and values of the school community and then communicated to the school community to reinforce their commitment to student success.

GOVERNANCE

1. The board and lead administrator have different responsibilities. The board creates:
    - The administrator's job description that reflects the reality of the role
    - A written succession plan should the lead administrator position become vacant
    - A written hiring plan for securing a quality lead administrator if position is vacant
    - A written lead administrator evaluation plan and conducts the annual evaluation
2. The board provides oversight to ensure consistent implementation of the vision an mission throughout the school and ensure the vision and mission are communicated publicly to stakeholders and the community. Oversight also includes monitoring multiple data sources.
3. The board has created or adopted a comprehensive list of policies and processes through the strategic planning process. Policies include:
    - Expectations for professionalism
    - Conflict and crisis resolution
    - Preparation for legal matters including access to an independent legal counsel
    - The content and distribution of board minutes
    - The creation and roles of active board committees (i.e. a finance committee) to support board function
4. The board engages in policy-driven leadership by consistently adhering to its policy manual when engaging in al strategic planning, oversight, decision-making, and other components of governance. Board initiatives and decisions reflect and align to its policies by:
    - Adhering to approved bylaws and Articles of Incorporation
    - Engaging in systems thinking and implementing procedures that will help future boards
    - Tracking and aligning policies to new legislative requirements
    - Using board evaluation/needs assessment to choose effective professional development
    - Basing decision on multiple robust data sources
    - Complying with school responsibilities to the authorizer as outlined in the charter contract
    - Engaging in continuous improvement strategies to ensure steady progress toward renewal
    - Engaging in timely, efficient, and productive meetings evidenced by timely decision-making

- Having board committees regularly report on progress or their oversight function to the board
- The board and board committees are regularly evaluated to strengthen practices.

5. Board members are highly engaged in fulfilling their board roles and expectations that are clearly defined and understood. All board members are:
    - Qualified for their roles and contribute to a high-function board
    - Familiar with the charter contract and waivers and activities reflect fidelity to these documents
    - Quickly and effectively engaged in a full, rigorous training
    - Recruited based on their skills and their ability to improve the board
6. The board complies with and creates policies and processes to involve internal and external stakeholders. This includes:
    - Making board policies and meeting minutes publicly available to internal and external stakeholders
    - Obtaining input to drive systematic improvement through satisfaction surveys and other methods
    - Having open records and meeting requirements
    - Creating active networks with external stakeholders beyond the school to improve school and board function
    - Developing and maintaining strong and positive working relationships with internal stakeholders

FINANCE

1. The school budget and revenue projections are realistically based on guaranteed revenue streams including enrollment. School has planned growth for enrollment, program offerings, facilities, and financing endeavors.
2. The school operates with and regularly monitors a balanced budget. A plan exists for prioritizing the allocation or expenditure of surplus funding. Budget is allocated appropriately:
    - Staff resources and salaries (50-70%)
    - Administrative salaries (8-15%)
    - Facility cost (less than 12%)
    - Accounts payable (should not include admin, staff, board members, school founders, etc.)
3. School is effectively funded by the following sources:
    - Stable enrollment
    - Adequate PPR
    - Additional programs such as before/after school care, pre-school, entrepreneurial endeavors etc.)
    - Grants
    - Fundraising
4. The board reviews any audits and board financial statements. The board discusses, approves, and makes financial decisions based on the reports. Findings are made publicly available.
5. Annual and long-term budgets are developed and monitored by administration and board finance committee and consider input from stakeholders. Budgets are based on school's visions, mission and strategic plan. Budgets are regularly reviewed for accuracy. A timeline is in place for developing, revising, and monitoring the budget.
6. The school proactively and effectively adjusts the budget to reflect changes in current enrollment and PPR funding. The board reviews adjustments monthly. The school has adequate reserves and assets to cover operating expenses for two months and can reduce expenses/spending should the need arise.
7. The board has recruited highly knowledgeable board members with financial expertise. Board members are appropriately engaged and trained to provide input, oversight, and corrective action on financial matters. This includes:
    - Understanding the school's current and future financial status
    - Working with the administrative team to make sure the school is operating within the parameters set by the budget and board

- Participating in training and networking opportunities, monitoring financial legislation and improve financial oversight
- Participating in the financial subcommittee to develop the budget and provide regular financial reports

8. The board has adopted a comprehensive set of regularly reviewed policies, aligned to state statutes, outlining the process for budget development, revision, approval, submission to the authorizer, and ongoing monitoring. These include:
    - Fiscal management policies to ensure compliance with all school finance laws and regulations
    - Credit card/P-Card policies that represent exemplary business practices
    - Policies that ensure a system of checks and balances of authority
    - Record retention policies that meet or exceeds district, state, and federal minimum requirements
    - The school is in compliance with all internal fiscal management and budget policies. The school regularly monitors for compliance.
9. The school has established complete financial autonomy from the authorizer and/or Educational Management Organization (EMO). The school operates appropriately as an independent business by having:
    - Bookkeeping and accounting practices are effective and model best practices.
    - Financial systems create the proper level of physical and digital security of financial records.
    - A complete risk coverage package that meets or exceeds recommended levels in all areas
    - A written plan and/or checklist that is used to monitor and maintain HR best practices that includes CBI background checks, reference checks, I-9, separate health record files, new hire reporting, current at will agreements, etc.

APPENDIX B

SCORING SHEET EXAMPLE

SCORING KEY

1 – Minimally Implemented: indicator is observed but the evidence is not strong enough to imply that indicator is a schoolwide priority for implementation rather than a few staff members.

2 – Partially Implemented: indicator is observed across grade and subject levels, evidence implies that indicator is a schoolwide priority, but implementation is in early stages or not all staff understand the process for implementation.

3 – Generally Implemented: indicator is observed in almost all classrooms and interviews. Schoolwide, it is a clear priority with clear steps for implementation. At this level of implementation, evidence of the indicator shows that the implementation is improving the school's effectiveness.

4 – Fully Implemented: evidence of indicator is observed in all interviews and classrooms. Schoolwide, it is a clear priority with clear steps for implementation. It is clear that all staff understand how to best implement the indicator. Evidence shows that school effectiveness is a result of the impact of the implementation of this indicator.

TABLE 1: EXAMPLE SCORING SHEET

Standards	Evidence	Score (1-4)
Faculty and Staff		
Teachers and school leadership establish and maintain and schoolwide dialogue		
School leadership use a transparent, clearly defined, and fully implemented system of evaluation to routinely monitor classroom instruction and provide regular and meaningful ongoing feedback.		
School leadership models and expects professionalism.		
School administrators hold staff accountable for instruction and growth.		
Teacher teams collaborate with grades and content areas to ensure horizontal collaboration.		
Teachers in and across schools participate in vertical collaboration.		
School administrators promote a culture of collaboration.		
Instructional staff engages in intentional, research-based, ongoing and job-embedded professional learning opportunities that address the needs of students and adults.		
Administrators support professional learning for teachers.		

Standards	Evidence	Score (1-4)
The school provides support to staff members to maintain and extend their capacity to contribute effectively to student learning and school improvement.		
Curriculum and Instruction		
The school uses indicators of mastery to describe types and levels of performance expected at each grade level.		
Formal and informal assessments are used to predict student performance, extend student learning, monitor and adjust curriculum and instruction practices and identify and address group or individual needs.		
Teachers provide students with regular, specific and timely descriptive feedback.		
Teachers feel an urgency/responsibility for students to demonstrate mastery and ensure that students meet grade-level expectations.		
Teachers incorporate an understanding of how students learn and adjust, clarify, or re-frame instructional strategies, routines, or content in a timely way to ensure all students are mastering required learning.		
Teachers and staff provide opportunities for students performing at grade level and beyond to ensure their learning is challenging, engaging and sustained.		
Teachers ensure that students' participation is active, purposeful and thoughtful.		
Instructional planning is learner-centered and emphasizes the relevance and application of acquired knowledge and skills to real-world situations.		
Planning ensures teachers have sufficient time, materials and instructional tools to teach the curriculum so students can learn the content and perform at mastery level.		
Curriculum and resources are allocated based on need to ensure all students have equal access to viable curriculum.		
Tiered support is an integral part of a rigorous, ongoing teaching/learning cycle and the school uses clear criteria and processes for making decisions regarding level and length of student participation in tiered supports.		
Communication and Culture		
The school provides culturally and linguistically appropriate school-home communication.		
Collaborative partnerships with families and the community are cultivated and emphasize shared responsibility for the success of students.		

Standards	Evidence	Score (1-4)
School staff and leadership prioritize establishing positive and trusting relationships with families.		
Teachers use and analyze student work data.		
Common processes, systems, protocols and language for analyzing data are used by school leadership and instructional staff continuously.		
Interim and summative assessments provide information on student mastery and progress over time.		
School leadership and staff regularly collect and analyze multiple types of data.		
Student behavioral expectations are well defined, posted in a variety of settings, and clearly communicated to and understood by students and families.		
School administrators ensure a safe and well-organized environment for staff and students throughout the school campus.		
The school demonstrates a welcoming and inviting learning environment for all staff, students, families, and community members.		
The school offers a range of extended learning opportunities within and beyond the school day.		
School leadership facilitates and identifies priorities for improvement efforts guided by and understanding of change processes.		
School leadership establishes and sustains focus on continuously improving student achievement while effectively motivating and encouraging teachers and minimizing factors that distract from the goal.		
Governance		
The board and lead administrator have different responsibilities determined by the board.		
The board provides oversight to ensure consistent implementation of the vision and mission throughout the school and ensure the vision and mission are communicated publicly to stakeholders and the community.		
The board has created or adopted a comprehensive list of policies and processes through the strategic planning process.		
The board engages in policy-driven leadership by consistently adhering to its policy manual.		
Board members are highly engaged in fulfilling their board roles and expectations that are clearly defined and understood.		
The board complies with and creates policies and processes to involve internal and external stakeholders.		

Standards	Evidence	Score (1-4)
Finance		
The school budget and revenue projections are realistically based on guaranteed revenue streams including enrollment.		
The school operates with and regularly monitors a balanced budget.		
School is effectively funded by approved sources.		
The board reviews any audits and board financial statements.		
Annual long-term budget are developed and monitored by administration and board finance committee and consider input from stakeholders.		
The school proactively and effectively adjusts the budget to reflect changes in current enrollment and PPR funding.		
The board has recruited highly knowledgeable board members with financial expertise.		
The board has adopted a comprehensive set of regularly reviewed policies, aligned to state statutes, outlining the process for budget development, revision, approval, submission to the authorizer and ongoing mentoring.		
The school has established complete financial autonomy from the authorizer and/or Educational Management Organization.		

APPENDIX C

SAMPLE INTERVIEW QUESTIONS

FACULTY AND STAFF

1. Schoolwide Dialogue
    - How often do instructional staff members discuss or analyze grade-level expectations? What are the expectations of these meetings or discussions? Who is responsible for organizing and facilitating that work?
    - Is there a schoolwide or district-wide assessment plan that has been shared with instructional faculty members which outlines the purpose, timing, and parameters of each required assessment?
    - What are the most important expectations that school leadership has for students' academic and behavioral performance?
    - Does school leadership encourage staff members to share information about research-based classroom practices? Please explain
    - What teams, committees, and individuals share responsibility and ownership for the school's success?
    - How does the school establish and maintain a dynamic but coherent approach to providing high impact instruction in all classrooms?
    - What are the research-based practices that guide expectations for teaching in this school?
2. Observations and Feedback
    - How are teachers and teacher teams held accountable for ensuring that instructional plans are focused on bringing students to mastery of grade-level expectations? How would you describe the link between standards-based planning in this school and the school's overall academic performance?
    - How are teachers held accountable for using research-based instructional practices?
    - How often do teachers use common scoring guides, anchor papers, and/or assessment protocols to improve consistent evaluation of student work?
    - Who is responsible for monitoring delivery of tiered supports and interventions?
    - Under what circumstances do school administrators provide feedback to teachers? For example, is feedback provided after every walk-through or only after formal observations? How is that accomplished, e.g., verbal communications, notes, emails?
3. Administration Responsibilities
    - How do staff members, such as new staff members, learn what the expectations are for professionalism?
    - What is the follow-up to classroom visits? Is feedback given consistently? In what ways does the feedback impact classroom practices?
    - What support is being provided to school administrators and staff regarding implementation of new processes for evaluation and accountability?
    - How do school administrators communicate the level of priority or urgency of a new task? How is buy-in for school tasks sought and sustained?
    - Do staff members regularly receive specific information about how an upcoming decision will be made and who will make it? Do staff members know if a decision is made at the district level, by school administrators, by a leadership team, with staff input, or by staff?
    - What process and criteria are used in recruiting teachers for this school?
4. Improvement and Accountability
    - How do teachers demonstrate that they recognize and accept their individual and collective responsibility for all students reaching mastery?

- What is the procedure for identifying a "low performing" teacher and providing training and mentoring in order to improve performance?
- What are professional growth goals intended to accomplish? To what degree do you believe they are making a difference?
- Do professional learning opportunities include information and strategies on how to implement new knowledge and skills in a way that will effectively impact student learning?
- Has the school set short-term goals that are achievable and celebrated as a way to build a sense of efficacy among staff and/or students?

5. Horizontal Collaboration
   - Do teachers in your grade level or department meet on a regular basis to plan instruction? If yes, please describe this process.
   - How often do you and your colleagues talk about the selection of specific instructional strategies to help students learn particular content?
   - Is time built into the school schedule and calendar for data dialogue and evaluation?
   - What purpose(s) do common assessments serve for students? for teachers? for the grade level or department? for the school?
6. Vertical Collaboration
   - Do teachers in your school work in vertical (cross-grade) groups to talk about curriculum expectations? If so, please describe the process and work that has been done.
   - How does the school address students' academic needs at key transition points, e.g., entry into primary, intermediate, middle school, high school levels?
   - How would you describe the level and quality of collaboration between classroom teachers and specialists?
   - What processes are used to align curriculum (grade-level knowledge and skills) among academic programs such as special education, electives/specials, and gifted education?
7. Culture of Collaboration
   - Is time built into the regular schedule for teachers to do collaborative planning? What is the rationale for this?
   - What tools are used to help guide instructional planning – for example, pacing guides, teachers' guides, other curriculum documents from the district or state?
   - What aspects of a "rigorous cycle of teaching and learning" are emphasized at this school?
   - What collaborative processes or structures exist that enable staff to suggest and consider possible changes or innovations as needs arise?
8. Professional Learning Quality
   - Does the professional learning in this school formally or informally address standards-based instructional planning? Would you provide an example, please?
   - Are there any authors, books, resources, theories of teaching and learning, etc. with which most of the instructional staff is familiar?
   - What assistance is available to ensure all teachers understand how to interpret data?
   - What professional learning opportunities help teachers promote equity and appreciate diversity?
   - Is the professional climate a safe environment so that teachers can share effective practices, modify their work, and provide support to colleagues? Examples?
9. Administrator Support
   - To what degree is time "protected" at this school so that the maximum time is available for instruction?
   - How does the school schedule support teacher planning and other collaboration, such as grade-level teams, data teams, and problem-solving?
   - How is implementation of new skills monitored for fidelity to proven practices? Example?
   - Are professional learning opportunities evaluated for relevance to school goals, usefulness for teaching and learning, and impact on professional practices?

10. Teacher Support
    - What professional learning opportunities support existing and/or long-term staff members?
    - What opportunities are there for activities such as peer observations, peer reviews, team building, study groups, etc. that support and promote a high level of professional capacity?
    - What support do new staff members receive as part of the district induction program?
    - What are some of the most important aspects of the school that new teachers should learn about? How does that occur?

CURRICULUM AND INSTRUCTION

1. Indicators
    - What does mastery look like in your class/course/school? Please provide an example.
    - How often do classroom practices enable students to explain their understanding of grade-level expectations?
    - How is it demonstrated to students that academic achievement is valued?
    - What schoolwide efforts are made to support students who are learning English as well as those who have limited English proficiency (e.g., limited academic vocabulary)?
2. Assessments
    - What are some ways you/the teachers you observe check for student understanding during a lesson?
    - Are classroom assessments aligned to learning targets? How is that determined?
    - How are results from student progress monitoring used in instructional planning?
    - Can most students in this school articulate the purpose of homework and the relationship between classroom learning and homework?
3. Feedback
    - How do teachers provide feedback to students in ways that lead to improved student performance?
    - Do students set learning goals for themselves? How do they learn to do this?
    - Are students taught a basic data dialogue process?
    - How is it demonstrated to students that academic achievement is valued?
4. Using Indicators
    - What concepts or processes do your students need to learn to the level of automaticity?
    - Is student self-evaluation an important area of emphasis in this school? If so, how is this promoted?
    - If teachers plan "with the end in mind," what factors are considered when determining what the "end" is?
    - Do students have more than one opportunity to demonstrate their learning? Please explain.
    - How are high but achievable academic expectations communicated to students?
5. Instructional Practices
    - Please give an example of scaffolded instruction you have taught or observed.
    - What strategies are used to uncover students' confusion about a topic?
    - How do teachers plan a progression of learning that will lead to mastery? Example? Comments?
    - How are students helped to make learning applicable?
6. Interventions and Supports
    - Are supplemental learning opportunities provided both to students who are not reaching mastery and to those who are performing above expected mastery? Please describe.
    - How does the school make sure students receive review and remediation in a timely way?
    - How would you describe the different purposes and organization of the levels of tiered instruction and intervention at this school?
7. Student Engagement
    - To what degree is student efficacy and persistence a concern in this school?

- How are higher order thinking and problem solving strategies and practice included in instructional planning?
- How do teachers in this school make sure assessments include higher order thinking?

8. Student Relevance
   - How do teachers make learning relevant to students?
   - What do you consider when you think about how students learn, versus what students should be learning?
   - To what degree is this school is focused on learning and learners? How is that demonstrated?
9. Resources
   - Do students have access to sufficient student materials to support their learning?
   - What processes are used if teachers or paraprofessionals need something additional to support instruction?
   - To what degree would you say the instructional materials, curricula, and academic tasks in this school (or this department, or grade level) are responsive to cultural differences?
   - How does school leadership help maximize the use of time, funds, talent, and facilities?
10. Curriculum
    - What classroom routines or practices do you/do teachers use to maximize instructional time?
    - What schoolwide efforts are made to support students who are learning English? Those who have limited English proficiency?
    - How do teachers find out what relevant academic terms students do or do not understand?
11. RTI Resources
    - How are tiered supports aligned with the regular cycle of teaching and learning at this school?
    - What criteria are used to determine when students no longer need a tiered support?
    - How would you rate the overall success of the school's interventions?

COMMUNICATION AND CULTURE

1. Communication
   - How do individual teachers communicate with families? How well is that working?
   - How are families informed about the grade level learning expectations for their children?
   - How does the school communicate the results of summative assessment to students?
   - How does this school involve family and community members from diverse cultural backgrounds in supporting students?
2. Partnerships
   - How does the school reach out to families to encourage a sense of collaborative partnership between home and school?
   - How is information about students' needs, status changes, and progress communicated both to students and their families?
   - What barriers exist that may keep families from being involved in student learning? What is being done to remove or minimize those barriers?
   - What have been your most successful outreach efforts to families and the community?
3. Support
   - Does the school help families locate or contact external support services? How does that happen?
   - How do you involve family and community members from diverse cultural or linguistic backgrounds in supporting their children's learning?
   - How does the staff establish positive and trusting relationships with families?
4. Classroom Analysis
   - What information do teachers consider when planning a unit of instruction?
   - Have teachers been trained in the use of protocols to analyze student work?
   - How often are students regrouped based on data review?
5. Schoolwide Analysis
   - Who is responsible for entering, collecting, displaying, and sharing data?

- How do staff members access and use multiple data sources?
- What data sources are included in this school's body of evidence? Are you aware of any gaps?
- What trend data are most meaningful or useful to you?

6. Data-informed decisions
   - What practices are in place to ensure data teams keep track of their data-based decisions?
   - What interim or benchmark assessments are given in this school?
   - What changes occur based on interim assessment results?
7. Schoolwide data-informed decisions
   - How does school leadership obtain data regarding the learning environment? What use is made of that data?
   - What school-level data are analyzed for purposes of school improvement?
   - How do school leadership and school staff work to stay up-to-date on effective school and effective practice research?
8. Behavior Expectations
   - Are there consistent student behavior expectations for all classrooms? How were they developed or adopted?
   - To what degree is the approach to student behavior proactive versus reactive?
   - How is conflict minimized, managed, and resolved at this school?
   - What is the "ladder" or sequence of steps to be taken for behavior issues at the classroom level? How do teachers, including new staff, become familiar with this information?
9. Physical Environment
   - What is done to ensure a safe and well-organized learning environment? How do safety and learning environment issues apply to staff as well as to students?
   - What policies or procedures help create a safe, orderly, and equitable environment in this school? How effective are they? Why do you think so?
   - What is your role in ensuring that the school has a safe, orderly, and equitable learning environment?
10. Emotional Environment
    - How does school leadership demonstrate that they value diversity in all groups, including staff, students, families, and community members?
    - How does the school create an environment in which all families feel welcome?
    - How do teachers and other staff members demonstrate that they care about students?
    - How are students helped to feel connected to and accepted by the school?
    - Has an environment of emotional or professional "safety" been established so that there is open, ongoing, and professional dialogue?
11. Extended Learning
    - How often during an academic year do your students conduct research-related work? How are research topics determined?
    - What before- or after-school learning opportunities are available to students?
    - What opportunities beyond the academic calendar are available to students?
    - How does the school promote a "balance" of students from different subgroups participating in various school activities?
12. Improvement and Change
    - What are the greatest 'change challenges' currently faced by this school?
    - What steps are taken to ensure a coherent approach to school improvement?
    - What are the challenges and successes of collaborative work on improvement planning?
    - What are the priority performance challenges identified by your school?
    - How often do staff members participate in the ongoing review of school improvement efforts?
    - What trend data have helped this school determine urgent needs for school improvement?
13. Focus and Vision and Goals
    - How are you routinely informed about school news, decisions, and events in a timely way?
    - How effective has school leadership been in maintaining staff focus and morale for meeting

school goals?

- Are you familiar with the school's mission? How was the school's mission developed?
- How often and by whom is the school's mission reviewed and revised?

GOVERNANCE

1. Administration Accountability
   - How do board members and lead administrator duties differ?
   - What is the succession plan if the lead administrator position becomes vacant?
   - What is the hiring plan for selecting a quality lead administrator?
   - How and when is the lead administrator evaluated?
2. Vision and Mission
   - What actions does the board take to ensure the implementation of the vision and mission?
   - How does the board communicate the vision and mission publicly to stakeholders and the community?
3. Policies and Processes
   - What planning processes are in place for the board?
   - How are the board processes and policies communicated to new board members?
   - Who is in charge of the content and distribution of board minutes?
   - What board committees exist that support board function?
4. Practices
   - How do board members participate in strategic planning?
   - How does the board engage in systems thinking and implement procedures that will help future boards?
   - What rules are in place to ensure the board engages in timely, efficient, and productive meetings evidenced by timely decision-making?
   - What procedures on in place for the accountability of board committees?
   - How and how frequently is the board evaluated to strengthen practices?
5. Board Member Responsibilities
   - Are board members qualified for their roles?
   - How are board members familiarized with the charter contract?
   - What trainings are in place for new board members?
6. Stakeholder Involvement
   - How does the board obtain input from stakeholders?
   - How does the board build relationships with stakeholders?
   - Where does the board store policies and meeting minutes to make them publicly available?

FINANCE

1. Projections
   - How are revenue projections created?
   - What is the school's plan for growth of enrollment and other financing endeavors?
2. Prioritization
   - How is budget prioritization decided?
3. Sources
   - Where does the school receive funding?
4. Reporting
   - How often do the board review financial audits when making decisions?
5. Development
   - Who is in charge of creating and monitoring the long-term budget?
   - How often is the long-term budget reviewed for accuracy?
6. Adjustments
   - How often does the boards review the short-time budget?

- Does the school have adequate expenses/spending should the need arise?

7. Board Responsibilities
    - Do board members receive financial training?
    - How does the board participate in training and networking opportunities?
    - Does the board have a financial subcommittee to develop the budget?
8. Policies
    - Who has the power to make purchases in the school?
    - What systems are in place to create checks and balances of authority
    - What board and school budget policies are in place?
9. Business Operations
    - Who is in charge of bookkeeping and accounting for the school and board?
    - What is the plan in place to monitor and maintain HR best practices?
    - What security systems are in place for financial data?

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