



AMERICAN ACADEMY
for
LIBERAL EDUCATION
CHARTER SCHOOL
SITE VISIT MANUAL

American Academy for Liberal Education
1050 17th Street NW - suite 400
Washington, D.C. 20036
Phone: 202.452.8611
Fax: 202.452.8620
www.aalecharters.org
charters@aale.org

Effective 06/2007

Copyrighted Material
Do not quote or reproduce without permission

Overview and Introduction

This *Charter School Site Visit Manual* is intended for use both by site team members and by schools planning for an accreditation site visit by the Academy. Its purpose is to facilitate preparation and conduct of site visits by making the key steps and purposes of the process explicit to all parties.

Any time frames outlined in this manual are approximate and represent sample cases. In reality, time frames may vary according to circumstances and necessity. When appropriate, reference is made in this text to the select Academy documents. Please contact the Academy or visit our website (www.aale.org) for copies of these documents.

Selection of a Site Evaluation Team

As representatives of an applicant school prepare the self-study, the Academy begins selecting a site evaluation team. A typical site evaluation team consists of three members representing appropriate areas of experience and expertise; the Academy makes particular efforts to include persons representing the liberal arts and sciences and also the charter school community. Team members typically include policy experts and scholars, senior school administrators, teachers, and others with extensive knowledge of K-12 charter schools, especially in the applicant school's locality.

The Academy provides applicants with the names, titles, and institutional affiliations of each proposed candidate for the evaluation team in advance of the site visit. The applicant school may also submit names, titles, and institutional affiliations of candidates they would like on the team to the Academy for review and consideration. However, final selection of the site team rests with the Academy. If it becomes necessary to alter the original composition of a site evaluation team for any reason, the applicant will be informed of the changes at least five (5) working days prior to the visit.

The Academy wishes to guard against actual or apparent conflicts of interest in the selection of site team members. A conflict of interest is defined as a circumstance or situation in which an individual's duty to make an impartial or unbiased decision may be affected by prior, current, or anticipated affiliation, relationship, or association with the school under evaluation. Because Academy staff with the power of appointment or invitation to an evaluation team cannot know of every possible conflict of interest, potential site visitors are expected to refuse an invitation if any conflict appears probable.

Applicant schools are also expected to comment on any possible conflicts of interest among proposed candidates for site visit teams. Site visit team candidates or applicant school officials concerned about potential conflicts of interest should consult with Academy staff.

Responsibilities of Site Team Members

Site team members are expected to act with dignity, courtesy, and professionalism at all times during their dealings with the Academy and the applicant school they have agreed to visit. They should strive to conduct their work unobtrusively and to avoid disrupting the routine and normal functions of the applicant school.

Team members are charged with responsibility for evaluating an applicant's fulfillment of the Academy's *Charter School Standards for Accreditation*. As they do so, they should always be mindful of broad issues of effective teaching, evidence of student learning, institutional goals and quality, administrative competence, and sound future planning, rather than on questions of mere compliance.

In particular, site team members are expected to:

- a. Review the applicant's self-study and supporting materials for completeness;
- b. Analyze the self-study's findings, along with other supporting materials submitted by the applicant, from the perspective of an external critic and in light of the Academy's *Charter School Standards for Accreditation* as well as of the applicant's own mission and educational objectives;
- c. Assess the applicant's fulfillment of the Academy's *Charter School Standards for Accreditation*, as well as the applicant's fulfillment of its own mission and educational objectives, through first-hand interviews and observations.

Responsibilities for particular areas of review and reporting will be assigned by the evaluation team chair in consultation with Academy staff. The findings of the site evaluation team will be expressed in a site visit report (see below, **Accreditation Site Visit Report**).

Although it is expected that site team members will offer constructive observations and suggestions for school improvement during the course of a site visit, any contributions made by team members in this way are secondary to their primary responsibilities to the Academy. Such observations should be explicitly distinguished from their review and reporting responsibilities as site team members, and do not reflect the views or formal accreditation decisions of the Academy. Academy site visit teams are specifically enjoined not to offer judgments or opinions concerning the overall accreditation status of a school at any time during the course of the site visit.

Definitive evaluation of compliance with the Academy's *Charter School Standards for Accreditation*, and the accreditation decision, will be made by the Academy's Board of Trustees, upon recommendation of the Academy's Charter School expert reviewers, and following a thorough review of application materials including, but not limited to, the self-study the site team report, and official responses by the applicant school to the site team report.

Honoraria

The Academy provides an honorarium of \$125 per day to the site team chair, and \$100 per day to each site team member.

Scheduling of Site Visits

The following chart shows a timeline for the site review portions of the accreditation process, starting with the self-study. It includes projections of the amount of time that should elapse between each step in the process.

Accreditation Schedule

Due Date & Timeframe	Action
	1. Self Study
(5 days after Self Study received)	2. Site Team Recommendations to AALE
(Ten days after Self Study received)	3. Site Team Identified
(Ten days after Self Study received)	4. Self Study to Site Team
(Twenty days after Self Study received)	5. Site Team Conference Call
(At least 30 days after Self Study received)	6. SITE VISIT
(Ten days after Site Visit)	7. Site Team Report to AALE
(Twenty days after Site Visit)	8. Site team Report due to School
(Twenty five days after Site Visit)	9. School Response Report to AALE
(Ten days after school receipt of Site Visit Report)	10. Expert Review Panel Identified
(5 days after AALE receipt of school response)	11. Expert Panel Receives all accreditation materials (Self Study, Site Visit Report, and school response)
(10 days after receipt of accreditation materials)	12. Expert Review Panel Recommendations for AALE Board of Trustees
Spring/Fall	13. AALE Board Vote

Dates for site visits are usually set three-to-five months in advance. Site visits are typically between three and four working days in length and take place during normal academic operations of the applicant school. In setting a date for the site visit, the applicant should be certain of the availability of its governing board chair, chief executive officer, principal administrative and academic officers, faculty, students, and other key personnel involved in the preparation of the self-study. Final selection for a site visit date will be made by the Academy in consultation with the applicant school.

Postponement of Site Visits

If absolutely necessary, postponement of the site visit may be granted. Such a request should be directed to the Academy's Director of Education Assessment and Charter School Accreditation in writing, and should be made as far in advance as possible. The school is expected to cover any additional costs incurred owing to a postponement.

The Academy also reserves the right to postpone a site visit if circumstances warrant it. Notice of such postponement will be made in writing to the chief executive officer of the applicant school. Any expenses incurred in the event of a postponement by the Academy will be covered by the Academy.

Site Visit Travel Arrangements, Expenses, and Reimbursements

It is the Academy's policy that the applicant school reimburses reasonable expenses for the travel, lodging, and meals incurred by site team members and Academy staff. The Academy makes every effort to keep the necessary costs of an accreditation site visit to a minimum, while making appropriate provisions for the comfort and convenience of site team members.

1. Travel

In most cases travel arrangements for site team members will be made by them and billed to the applicant school. Arrangements will be made in consultation with Academy staff at the lowest available non-refundable advance purchase airfare. Reasonable efforts will be made to accommodate their travel needs and schedules.

Site team members driving to a site visit destination in personal automobiles will be reimbursed at current approved Federal mileage reimbursement rates; total reimbursement for mileage will not exceed the lowest available non-refundable advance purchase airfare for equivalent travel. Arrangements for parking at or transportation to and from airports of origin should be made by site team members, and will be reimbursed upon completion of the site visit.

Transportation to and from the site visit destination airport and during the course of the visit will be arranged by Academy staff. Rental of automobiles by site team members for travel to a site visit destination or for use during a site visit will be allowed only in exceptional circumstances and with prior approval from Academy staff.

2. Lodging

In most cases lodging arrangements will be made directly by the applicant school, in consultation with Academy staff. The applicant's accreditation liaison will be informed of any special site

team member needs. Every reasonable effort should be made to lodge site visitors and Academy staff at the same location and within a reasonable distance to the applicant's campus.

3. Meals

It is customary for the applicant school to host a kick-off event, typically a dinner, for the Academy's site team the evening before formal work begins. Representatives of the applicant school at this event should include, whenever possible, the following: chair of the governing board and other trustee(s), chief executive officer, school principal, and other key staff and constituents as appropriate. This kick-off event provides site team members and school representatives with an opportunity to become acquainted with one another and to begin their conversations in a collegial setting.

Working breakfasts as well as working meals taken on campus or with applicant staff, faculty, or students are hosted by or billed to the applicant. It is the Academy's custom to host working dinners for the site team, typically on the second and third evenings of the site visit.

4. Incidental Expenses

In most cases travel, meal and lodging arrangements and expenses will be coordinated by the Academy for reimbursement by the applicant school. For all expenses the site visitor should submit an *AALE Charter School Expense Reimbursement* form. The following is a list of allowable other incidental expenses: economy parking; taxi, rail, or bus fares to and from airports and site visit destinations, as necessary; meals taken in transit to or from the site visit destination; tips for site visit related expenses. Incidental expenses generally not covered by the Academy or applicant schools include items such as laundry, movies, light snacks, mini-bar use, and other similar expenses incurred during or in transit to a site visit.

5. Expense Reimbursements and Invoices

The Academy reimburses site visitors directly and then bills the school for reasonable expenses incurred during or in transit to a site visit.

Site team members should complete an *AALE Charter School Expense Reimbursement* form, attach original copies of all appropriate receipts, and send them to the Academy within two weeks of completing the site visit. An invoice from the site team member for the site visit honorarium should also be sent -- as well as a completed federal W9 (*Request for Taxpayer Identification Number and Certification*). AALE will reimburse site visitors thirty (30) days after receiving all these materials.

Materials for Review by Site Team Members

Approximately two months prior to the site visit, applicants should send AALE four (4) copies of the following materials for review:

1. cover letter;
2. self-study;
3. any necessary supporting documents.

Three (3) copies of the above materials will be sent to the site visitors.

During the site visit, the school should make available for use by site team members other supporting documents; for example, student portfolios and/or other appropriate evidence of student learning and achievement, survey data, board minutes, internal planning documents, development campaign materials, student recruitment materials, etc. These materials should be identified and selected prior to the visit in consultation with Academy staff and the site team chair.

A secure workroom should be set up for use by the site team and AALE staff during the site visit. Ideally the site team should have access to secure computers and a printer for use in drafting the site visit report.

Procedures for Site Team Members

1. Before the Site Visit

- a. Approximately two months before the date of the site visit, Academy staff will invite prospective site team members to take part in the site visit. Prospective site team chairs will be contacted before other potential team members. Following selection of a site team chair, Academy staff will contact other prospective site team members and invite them to take part in the site visit.
- b. Approximately one month prior to the site visit, Academy staff will contact site team members in order to begin making travel arrangements.
- c. Approximately one month prior to the site visit, site team members will receive, a complete set of materials for review, including the self-study and any necessary supporting documents. Site team members should contact Academy staff if they have any questions about the review materials or if they would like to request additional materials not included in the original mailing.
- d. Upon receipt of the materials for review, site team members should determine whether, in their judgment:
 - 1) the self-study appears to be sufficiently responsive and informative in light of the Academy's *Charter School Standards for Accreditation*;
 - 2) the self-study appears to be sufficiently evaluative and projective;
 - 3) the self-study appears to be consistent with other published materials of the school;
 - 4) the self-study enables them to form a well-rounded preliminary view concerning the applicant's fulfillment the Academy's *Charter School Standards for Accreditation*;
 - 5) any issues raised in the self-study report require further clarification or information.

An effective self-study submitted for accreditation should provide comprehensive descriptions and information concerning a school's educational, administrative, financial, and other key functions. However, site team members must remember that a weak self-study report does not necessarily indicate a weak program or school, and vice-versa. Team members should keep in

mind the distinct roles played by the self-study report and the evaluation team site visit in the accreditation process.

In the weeks leading up to the site visit, the chair of the site team is responsible for making preliminary assignments of areas of responsibility to the other team members, in consultation with Academy staff. The chair is also responsible for conducting preliminary conversations with other team members regarding the application materials for the school under review if necessary. These responsibilities may be carried out by correspondence or by conference call, at the discretion of the team chair and in consultation with Academy staff.

2. During the Site Visit

a. Sample Schedule

Site visits conducted by the Academy usually take place over a period of four days. The team typically will arrive at the site visit destination the afternoon of the first day in time for a school-hosted kick-off event, typically a dinner. They will depart the afternoon of the fourth day. The sample schedule below can be used as a guide but may be customized by the school according to schedules and circumstances.

Sample Schedule for an Academy Site Visit

Day 1

Afternoon

Team members arrive at destination, travel to and check into lodgings, and hold preliminary planning meeting (see below).

Evening

School-hosted kick-off event for team members and select school representatives, including chair of the governing board and other trustee(s), chief executive officer, principal, and others as appropriate.

Day 2

Morning

Tour of campus and school facilities; meetings with administrative leadership staff

Noon

Lunch with faculty members and/or any appropriate faculty committee(s).

Afternoon

Team and individual meetings with school's choice of administrators, teachers, Board members, parents, resource staff, support staff, etc.; class visits as possible

Evening

Team dinner and debriefing

Day 3

Morning

Class visits

Noon

Lunch with students

Afternoon

Team and individual follow-up meetings with administrators, teachers, Board members, parents, resource staff, support staff, etc.; additional class visits as necessary

Evening

Team dinner and debriefing

Day 4

Morning

Team and individual follow-up meetings with administrators, teachers, Board members, parents, resource staff, support staff, etc.; additional class visits as necessary; team drafts report

Noon

Team working lunch

Afternoon

Team conducts exit interview with administrative leadership staff, Board chair or representative(s), principal, others at discretion of school; team departs

b. Preliminary Planning Meeting

The chair of the site visit team will conduct a meeting with all team members shortly after their arrival at the site visit destination, or if necessary by conference call the week preceding the site visit. Purposes for this preliminary meeting include:

- setting an appropriate tone for the visit;
- identifying salient issues for joint or individual investigation during the site visit;
- assigning responsibilities for class visits and individual interviews;
- determining preliminary site evaluation report writing assignments.

During this meeting decisions may also be made concerning the extent and types of information to be reviewed or collected on site (e.g., governance documents, class syllabi, student test data, etc.), and in what cases appropriate sampling can be used (e.g., for faculty credentials, SPED documents, student records, library holdings).

It is essential that a site visit team act in concert during their visit to the applicant school, particularly in their representations to officials, faculty, and students of the applicant school. As noted above, site team members should be especially careful to distinguish between their individual constructive comments and observations and their responsibilities as evaluators for the Academy.

Team members and applicant schools should be aware at all times that definitive evaluation of compliance with the Academy's *Charter School Standards for Accreditation*, and the accreditation decision, will be made by the AALE Board of Trustees, upon recommendation of the Charter School expert reviewers, and following a thorough review of application materials including, but not limited to, the self-study, the site team report, and any official responses to the site team report.

c. Questions for Consideration

Site team members should consider the following questions as the site visit proceeds:

- Are team members accurately assessing all relevant aspects of the applicant school's operation?
- Are team members' interviews and observations reflecting broad involvement by the different segments of the applicant's community?
- Do team members' observations appear to identify clearly the applicant's areas of strength and weakness?
- Do team members observe a well-understood and coordinated commitment on the part of the applicant to improving all aspects of its operations, especially in areas of weakness identified in the self-study?
- Are team members' observations permitting them to form an adequate overall impression of the apparent educational, administrative, and financial quality of the applicant school, as well as of its prospects, both in light of the Academy's *Charter School Standards for Accreditation* and of the applicant's own charter?

3. At the Conclusion of the Site Visit

During the site visit, evenings are set apart for debriefing and drafting of the site visit report. Additional periods during the school's operating hours may also be set aside. Team chairs are responsible for seeing that a reasonably complete preliminary draft of the site visit report has been prepared *by the conclusion of the site visit*.

By the last evening or morning of the site visit, team members should have reached agreement on the proposed overall structure and content of the site visit report. Team members should prepare for the exit interview at this time by identifying salient issues arising from the site visit and assigning interview reporting responsibilities.

On the last day of the site visit, an exit interview is conducted by the Academy's site visit team with representatives of the applicant school (school staff attending this meeting are selected by the principal or chief executive officer).

This exit interview provides a concise summary of the team's key findings. It is essential that the exit interview be consistent in tone and content with the final written evaluation team report. During the exit interview team members typically report general observations, ask final questions, and review salient findings of the team. The Academy staff representative will describe the next steps in the accreditation process, including the opportunity for the applicant school to submit factual and substantive responses to the site team report.

Please note: The exit interview is not intended to present the detailed findings of the site evaluation team; these will be made available to the applicant school in the form of the completed site visit report. Academy site evaluation teams are specifically asked NOT to offer judgments or opinions concerning whether the school merits accreditation at any time during the course of the site visit or in the final site report.

Before leaving campus, site team members are expected to submit draft reports addressing their areas of responsibility to the team chair. The team chair is then responsible for assembling a full draft of the report within one week of the conclusion of the site visit, with the assistance of Academy staff. The team chair also prepares an introduction to the report, concisely describing the school and its salient characteristics and circumstances (see **Site Visit Report** below). When a

full draft has been prepared, it is circulated to team members for review, correction, and final approval.

The Site Visit Report

The findings of the site team should follow the AALE *Accreditation Site Visit Report* format (copies of the format will be provided to all team members). This report must represent the considered professional judgment of the team as a whole and be a consensus of their findings.

The Academy requires that the *Accreditation Site Visit Report* include the following:

1. A narrative overview concisely summarizing:
 - a) the salient historical and factual circumstances of the applicant;
 - b) the recent and current state of the applicant;
 - c) salient school strengths and areas for improvement or concern;
 - d) major issues, challenges, and opportunities facing the applicant in the foreseeable future.
2. A list of the titles (not names) of all school officials, committees, and general description of other persons interviewed during the site visit.
3. A body of text concisely addressing each of the Academy's Charter School Standards for Accreditation, arranged by standard and indicating whether the applicant *meets, does not meet, or exceeds* each standard with appropriate support and elaboration. In determining whether the applicant fulfills each standard, site team members must decide whether any formal notice is appropriate:
 - A **Stipulation** is a team's professional judgment that a school appears to face a significant issue in regard to fulfillment of all or part of an accreditation standard. This judgment should be clearly supported in the narrative. Stipulations identify significant issues and may include recommended solutions.
 - A **Recommendation** offers a course of action that in the team's professional judgment would result in an improvement of the educational or administrative qualities of the school, although specific attention to such action is not necessary to fulfill the Academy's requirements.
 - A **Commendation** indicates that the applicant fulfills one of the Academy's standards in an exemplary or particularly noteworthy fashion.
4. The names, titles, and affiliation of each site team member.
5. The required Academy evaluation site report disclaimer:

“The site evaluation team report and any statements therein regarding compliance with the Charter School Accreditation Standards of the American Academy for Liberal Education represent only the considered opinion of the evaluation site team members at the time of the visit. Definitive evaluation of compliance and the accreditation decision will be made by the Academy's Board of Trustees, upon recommendation from the Charter School Board of Review, following a thorough review of application materials including, but not limited to, the self-study, the site evaluation team report, and any official responses to the site team report.”

Final Site Visit Report

After the visit, and with the assistance of Academy staff, the team chair edits and combines the individual team member draft reports into a concise, well-organized, articulate document. The resulting draft is distributed to all team members for review, revision, and approval. These steps ensure that the final report represents the synthesized view of all site team members, and helps

ensure a balanced presentation. Academy staff reviews the draft to ensure that it meets the requirements (see above) for an accreditation site report.

Once the combined draft is complete, typically within two weeks of the conclusion of the site visit, the Academy forwards a copy of the site team report to the applicant school for any factual correction. The applicant must send notice of factual corrections, if any, to the Academy within one week of receipt of the draft site report. Academy staff will incorporate all appropriate corrections in consultation with the site visit team chair and other site team members as necessary. The corrected document then becomes the final report of the site team. Once the final report is forwarded to the applicant the normal duties of the site team members are complete. Site team chairs may be asked to appear before the Academy's Board of Trustees at the accreditation review meetings for applicant schools.