



Orange County Department of Education

Charter Schools Monitoring

Annual Oversight Visit Guide

OVERVIEW

The Orange County Board of Education (OCBE) and the Orange County Department of Education (OCDE) are dedicated to ensuring that all students are equipped with the competencies they need to thrive in the 21st century. Included in the educational options for our county's children and parents are high quality charter schools that emphasize rigorous academic standards, innovative programs, and responsible business practices.

To support this mission, the Charter Schools Unit is responsible for facilitating the petition review process, making recommendations to OCBE regarding the approval or denial of petitions, and answering questions petitioners may have regarding the process. Once approved, the Charter Schools Unit monitors school performance in accordance with state and federal law, OCBE policy and the school's charter.

SITE VISIT PROCEDURES

In accordance with California Education Code §47604.32, OCDE annually conducts at least one school site visit focused on the following categories:

- **General Requirements** related to authorizer activities, material revisions, assurances and MOUs.
- **Fiscal and Business Operations**, including attendance, records, payroll, budget, accounting and financial reporting, annual audit, financial condition, and inventory.
- **Educational Program: Local Control and Accountability Plan** regarding the Plan submitted and stakeholder consultation, expenditures and budget alignment.
- **Educational Program and Ongoing Assessment**, including the educational program, English learner and special education services, curricular materials, professional development, teacher credentials and qualifications, assessment and testing.
- **Facilities** condition and adequacy to meet educational program requirements.
- **Governance**, including board management, board meetings, parent and staff involvement.
- **Personnel**, including training, handbooks and policies for all employees.
- **Student Services**, including admissions, discipline, health and safety, and parent notifications.

LOGISTICS

The annual oversight visit typically encompasses three (3) activities:

1. Interview/discussion
2. Observation
3. Document review

Allow four hours for the site visit.

OCDE requests that the charter school provide a small working area with a table and chairs for five people as well as a nearby electrical outlet.

Provide five (5) copies of the following items:

- Monitoring visit schedule as determined by school (interviews, file review, classroom observation)
- Master schedule and staff roster
- Site map and bell schedule

INTERVIEW/DISCUSSION

OCDE Charter Schools review team will hold an introductory meeting with school leadership. Interviews and meetings with school leadership and staff will cover specific topics, including finance, enrollment, governance, and instructional program. The school will determine the appropriate individuals to meet with the review team and the schedule for the interviews on the day of the site visit. It is recommended that the school provide interview time with the personnel that can address the items on the *Annual Oversight Checklist*, such as principal, board member, English language development coordinator, special education coordinator, teachers and person in charge of school finances.

OBSERVATION

The review team will visit randomly selected classrooms to observe the instructional program. All grade levels will be observed as well as special designation classes such as English learner and special education. A facility inspection will be conducted to determine the condition of the school and adequacy to meet educational program requirements.

DOCUMENT REVIEW

OCDE Charter Schools Unit will examine documentation throughout the fiscal year in order to gather information on the school's performance in the categories set forth above. In addition, the team will review student files, including English learner and special education.

CLOSING MEETING AND REPORT

The team lead will meet with school leadership at the end of the visit to debrief. The team lead will identify any additional information or documents needed, and a timeline for submission will be established. A report of the results of the review and a summary of oversight conducted throughout the year will be forwarded to the designated charter school contact at the end of the fiscal year. Preliminary reports may be provided to the school as necessary.

CONTACT INFORMATION

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