



# Charter School Annual Oversight Visit Guide

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The information contained in this document is intended to assist charter school operators in preparing for the Orange County Department of Education annual oversight visit. Orange County Department of Education staff are available to answer questions regarding the appeal process. Contact the Charter Schools Unit at (714) 966-4381 to speak to a representative or schedule an appointment.

## I. SITE VISIT PROCEDURES

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

- A. General Requirements related to authorizer activities, material revisions, assurances and the operating Agreement (MOU)
- B. Fiscal and Business Operations, including attendance, records, payroll, budget, accounting and financial reporting, annual audit, financial condition, and inventory.
- C. Educational Program: Local Control and Accountability Plan regarding the Plan submitted and stakeholder consultation, expenditures and budget alignment.
- D. 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.
- E. Facilities condition and adequacy to meet educational program requirements.
- F. Governance, including board management, board meetings, parent and staff involvement.
- G. Personnel, including training, handbooks and policies for all employees.
- H. Student Services, including admissions, discipline, health and safety, and parent notifications.

## II. LOGISTICS

The annual oversight visit typically last four hours and encompasses three activities:

- A. Teacher, staff and administration interviews
- B. Classroom Observations
- C. Pupil file reviews

OCDE requests that the charter schools provide a small working area with a table and chairs for a minimum of five people as well as nearby electrical outlet and a meeting space for the five person team and any additional school personnel. Please provide five 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

### **III. INTERVIEWS AND 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 appropriate personnel such as the principal, English language development coordinator, special education coordinator, teachers and person in charge of school finances.

### **IV. 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.

### **V. 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.

### **VI. CLOSING MEETING AND REPORT**

The team lead will meet with school leadership at the end of the visit for a short 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, notices of concern and requests for information may be provided to the school and the Orange County Board of Education as necessary.

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