



# 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 (OCDE) annual oversight visit.

## 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:

- A. *General Requirements* related to authorizer activities, material revisions, assurances and the operating Agreement
- B. *Fiscal and Business Operations*, including attendance, records, payroll, budget, accounting and financial reporting, annual audit, financial condition and inventory.
- C. *Educational Program and Ongoing Assessment*, including English learner and special education services, curricular materials, professional development, teacher credentials and qualifications, Local Control and Accountability Plan, academic assessments and performance.
- D. *Governance and Operations*, including board management, board meetings, personnel, facilities, health and safety, pupil records, policies and procedures.

## II. LOGISTICS

OCDE requests that charter schools provide at least two separate spaces for interviews and a working area with a table and chairs for a minimum of six people. The annual oversight visit typically encompasses:

- A. Teacher, staff and administration interviews
- B. Classroom observations
- C. Pupil and personnel file reviews
- D. Document review
- E. Facility inspection

OCDE will collect the following documents prior to the visit:

- A. Video presentation of general school overview, including academic performance data and description of the educational program.
- B. Master schedule and bell schedules
- C. Staff and student rosters
- D. Financial documents

### **III. INTERVIEWS**

The review team will hold an introductory meeting with school leadership and conduct interviews and meetings with the school's governing board members, administrators, support providers, teachers and staff. It is recommended that the school include interview time with appropriate personnel such as the principal, English language development coordinator, special education coordinator, teachers, and person(s) in charge of school finances and operations.

### **IV. CLASSROOM OBSERVATION AND FACILITY INSPECTION**

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. A facility inspection will be conducted to determine the condition of the school and its adequacy to meet educational program requirements.

### **V. DOCUMENT REVIEW**

The review team will examine documentation at the visit and 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 personnel and student files.

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

The assigned liaison will meet with school leadership at the end of the visit for a short debrief. At that time, any additional information or documents needed will be identified 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, requests for information and notices of corrective action may be provided to the school throughout the school year and updates presented to the Orange County Board of Education as necessary.

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