

Charter Renewal Site Visit Checklist



As soon as Renewal Application is released:

- Review the Site Visit Guidebook and Appendices
- Select one of fall three site visit dates provided by CSI
- Schedule initial renewal phone call with CSI staff
- Update and/or review most recent Unified Improvement Plan (UIP)

Three to five weeks prior to the visit:

- Confirm site visit date with CSI
- Schedule pre-visit meeting (phone or in-person)
- Ensure that no field trips, special events, or school-wide testing is schedule for day of the site visit.
- Finalize and review UIP Action Plan
- Complete pre-visit meeting
- Review site visit protocol with relevant staff and board
- Work with CSI site team leader to determine the agenda for the visit. Agenda must be finalized at least one week prior to the visit.
- Identify a secure, private space that can serve as a meeting room for the site visit team throughout the day.
- Identify staff member(s) who will be available to accompany CSI team throughout the site visit.
- Select participants for interviews and focus groups.

One week prior to the visit:

- Speak with CSI site visit team leader to finalize the visit schedule, observation form, and to discuss logistics. Ask any additional questions about the visit and protocol at this time.
- Begin to assemble any requested onsite documentation (if applicable).
- If site visit includes virtual components (videos, virtual interviews, websites), send appropriate links to CSI site visit team leader.

The day prior to the visit:

- Distribute the visit agenda to the school community.
- Determine who should attend the closing meeting at the end of the site visit.
- Ensure onsite documentation is organized and easily available to site visit team (if applicable).

During the visit:

- Ensure the site visit team's meeting room remains private.
- Be available to the site visit team for a morning orientation, scheduled interview(s), and any necessary follow-up. Assist team (or assign designee) in obtaining any additional information, documents, data, or interviews with staff.
- Bring concerns and questions to the attention of the team as they arise.
- Attend the closing meeting with the site visit team.

After the visit:

- Provide any additional documentation or information as requested.
- Review site visit narrative, and if necessary, prepare a response. This response will be appended to the narrative.