

Review Year Site Visit

School Name: _____

Review conducted by: _____

Date of Visit: _____

School Personnel Present: _____

Review Type: 3-Year

5-year

Other

GOVERNANCE STRUCTURE

Criteria	Required	Evident?	Documentation
Number of board members			
Selection and removal of board members			
Terms of Office			
Meetings			

CHARTER FIDELITY

The Charter School mission statement, as set forth in the application, is:

Mission execution is evident via key elements throughout the school or supporting documentation:

Key Elements	Evident?	Documentation/Notes

GOVERNANCE OBSERVED PERFORMANCE

Performance Indicator	Evident?	Examples
Board provides effective governance for school's administration		
Board members and relevant staff appeared to be prepared for the meeting		
Board members adequately discuss agenda items and vet issues		
Meeting discussions are appropriate to the agenda item		
Board Interactions with each other are appropriate and respectful		
Board Interactions with staff are appropriate and respectful		
Board Interactions with the public are appropriate and respectful		

ASSURANCES

Performance Indicator	Evident?	Documentation
Board Training		
Board Background Checks		
Noticed Meetings		
Meeting Recordings		
Meeting Minutes		
Closed Meetings		
Board Financial Review		
Internal Controls		
Procurement		
Administrator's Report		
Administrator's Annual Evaluation		
Board review of charter goals		

SCHOOL ACHIEVEMENT MEASURES

Provide documentation to demonstrate status toward goal achievement. Indicate current status based on data.

Measure	Metric	Most Recent Data	5 Year Average	Trend	Meets?

Notes:

FINANCE INDICATORS

Indicator	Target	5 Year Average	Trending +/-?	Meets Target?
Multi-Year Cash Flow				
Total Margin				
Audit Findings				

Notes:

STUDENT ENROLLMENT AND ENGAGEMENT DATA

School Year	Grades	Max Enrollment	Oct 1 Count	Enrollment as of _____:	Prior Year ADM:	Wait List	Returning Student Count

Notes:

STUDENT ENROLLMENT AND ENGAGEMENT INDICATORS

Indicator	Measure	5 Year Average	Trending +/-?	Meets Metric?
Transfer Rate	End of year transfer rate \leq 20% and no more than 4% higher than prior year's rate			
Retention Rate	Year to year retention rate \geq 60% and no more than 7% lower than prior year's rate			
Enrollment Trend	October 1 count \geq 90% of prior year			

Notes: