Appendix

Appendix A: Template for Amendments to Charter School Agreements

Appendix B: District of Columbia Public Charter School Board Application Guidelines

Appendix C: Sample District of Columbia Public Charter School Performance Reports

Appendix D: Sample Financial and Audit Review Report

Appendix E: Sample Equity Report

Appendix F: Qualitative Site Review Protocol for District of Columbia Charter Schools

Appendix G: District of Columbia Charter School Compliance Review Report

Appendix H: 2014 District of Columbia Public Charter School Board Organization Chart

Qualitative Site Review Protocol for DC Charter Schools

Updated November 2013

DC Public Charter School Board
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Table of Contents

Overview and Purpose of the QSR

DC Public Charter School Board ("PCSB") has developed a review instrument that helps inform our determination of whether a public charter school is meeting the goals and student expectations as described in its charter agreement.

The purpose of this instrument is to provide PCSB board members, PCSB staff, public charter school leaders, and other community members with qualitative evidence to complement the quantitative evidence gathered in the Performance Management Framework ("PMF") and through other quantitative data.

Qualitative Site Reviews ("QSR") are comprised of two components that are conducted at the campus level and two that are conducted at the school level:
  a. An introductory meeting with school leaders to gather information about the school's mission, vision, and academic program (school);
  b. Unannounced school visits (campus);
  c. Observation of the school's board meeting(s) (school);
  d. Observation of a school's parent event(s) if it is pertinent to the school's goals (campus).

The QSR team produces a final report containing an overall assessment for each campus within the Local Education Agency ("LEA"), which is sent to the school leader and board chair within six weeks after the visits.

At the heart of the QSR are classroom observations, which are conducted during unannounced school site visits in a pre-determined two-week window. Using the Framework for Teaching[1] rubric, trained PCSB staff and consultants collect objective, qualitative evidence of the teaching and learning occurring at the campus.

In school year 2013- 2014, PCSB will complete QSRs at campuses that meet at least one of the following criteria:

- Eligible to petition for 15-year Charter Renewal during the 2013-14 or 2014-15 school years.
- Eligible for five-year or ten-year Charter Review during the 2013-14 or 2014-15 school years.
- Designation as a Focus/Priority school by Office of the State Superintendent ("OSSE")[2].
- Tier 3 ranking on the PMF during the 2012-13 school year[2].
- Meeting less than 30% of targets in an Accountability Plan during the 2012-13 school year[2].

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[1] See www.danielsongroup.org

[2] Initially the QSR will only apply to the relevant campus in the case of multi-campus schools. PCSB reserves the right to expand the QSR to the entire LEA based on its initial findings.

The following represents a general overview of the QSR process, as well as some of the required documents to be made available before the visit.

Conducting the Qualitative Site Visit

Pre-Visit Meeting

PCSB assumes that the school leader will act as the coordinator and liaison for the QSR; however, the school has the option of designating another person to assume this role. PCSB works with the designated person to ensure that key documents are provided to PCSB and the QSR team prior to the on-site visits.

PCSB will invite school leader(s) to meet approximately two months prior to the QSR Two-Week Window. The QSR coordinator will meet with school leadership to discuss the following items:
- Introductions/Purpose of the Meeting
- Overview of Qualitative Site Visits
- School's Mission and Goals
- Site Visit Logistics
- Details about unannounced site visit window
- Discussion about Board Meetings and Parent Meetings (if applicable)

For schools undergoing charter renewal or review, a member of the charter agreement team also attends the pre-visit meeting to discuss the alignment of the QSR with the charter renewal/review process.

The following documents are requested to be electronically submitted prior to the pre-visit meeting (please see Required Documentation, page 9, for more details):
- Professional Development Calendar
- Teacher Roster
- Master & Daily Schedule and School Calendar
- Floor Plans (if useful)
- Dates that may conflict with the unannounced two-week visit window, such as field trips, school-wide testing, assemblies, presentations, other visitors, etc.
- Dates for Parent Meetings for the school year
- Dates for Governing Board meetings for the school year

Unannounced Two-Week Visit Window
At the pre-visit meeting, PCSB and the school agree upon a two-week window during which the QSR team may arrive at various times to observe classrooms and the school. It is requested at the pre-visit meeting that the school let PCSB know of dates in the two-week window when students would not be in classes (professional development days, field trips, assessment testing, etc.)

A list of possible observers will be given to the school at the pre-visit meeting. PCSB will inform the school of changes prior to the two-week window. Schools should plan on two to four hour observations. Some classrooms may be observed more than once. PCSB's goal is to observe more than 75% of the teaching staff, with a focus on the core content teachers

Classroom visitors will not be disruptive to classroom activities. Visitors will not interrupt the lesson, and will take cues from the teachers and students as to where to sit, and if appropriate, to talk with students. The classroom visitor will be taking notes during the observation. If the school leader learns of any improprieties done by the observer, s/he should notify Erin Kupferberg, ekupferberg@dcpcsb.org immediately to file a complaint.

Governing Board Meeting
A PCSB staff member or consultant will attempt to observe the majority of one governing board meeting for the school. The purpose of this visit is to gauge the extent to which the school's governance is providing effective oversight of the charter school.

Parent Event
At PCSB's discretion, based on the pertinence to the school's goals, a PCSB staff member may observe part of a parent event at the school.

QSR Report
After the unannounced two-week window, the QSR team prepares a written report that includes the team's findings and the evidence to support those findings. The report includes evidence and findings on the charter's mission and goals, classroom environments, instructional delivery, and comments on other material topics, such as meeting the needs of all learners, school climate, and governance. The QSR team lead will set a meeting with school leadership to go over the findings. The goal of the report-out is to share evidence-based findings with the school collected throughout the two-week observation period and at the board meeting and parent event, if applicable. The QSR report will be submitted shortly after the two-week window to the school's board chair and school leader and the objective qualitative evidence can be used to identify trends and areas of strengths and weaknesses. The report will be used to inform charter renewals, charter reviews, ESEA Waiver reports, and to provide the Board with complementary evidence to support (or not) a Tier 3 PMF score.

The school can respond to findings in the report that it disagrees with by submitting a written response to PCSB's Deputy Director.

Team Organization and Reflection

In addition to the team lead, the Review Team comprises other PCSB staff and consultants who are assigned to visit the school during the unannounced two-week window. The review team will consist of two or more individuals, depending on the number of core-content teachers in the school.

Responsibilities of the Team Lead:

- Contact the Review Team prior to the unannounced two-week window and disseminate information submitted by the school for the QSR visit.
- Assign a set of teachers to observe to each member of the Review Team
- Indicate times of day specific members should observe at the school (am or pm) to observe a variety of classrooms.
- Collect all observation notes from each member of the team
- Organize and conduct follow-up meeting for team members to discuss observations
- Write the QSR report
- Set up a time with the school to give a report-out of the QSR findings to leadership within two weeks of the unannounced two-week window
- Serve as a liaison between the school leadership and the team by answering questions, receiving calls of concern, or in cases of emergencies, such as if the school closes unexpectedly due to inclement weather and the two-week window needs to be revisited.

Responsibilities of the Review Team:

- Review documents from the school and QSR templates prior to the unannounced two-week Window, specifically the school's mission and goals.
- Plan to spend approximately four hours at the school during the two-week window, please consult the school's schedule when determining your visit schedule.
- During school observations, refrain from judgment and ground comments in evidence, observations, and data.
- Refer to the entire QSR Evidence Collection Form when observing a school and collect observations and evidence in each section, including each of the goals possible for the school.

- Submit all QSR paperwork (Classroom Observation Form and QSR Evidence Collection Form) by the last day of the unannounced two-week window.
- Be available to meet with the Review Team in the two days following the unannounced two-week window by phone or in person.
- Review the QSR report draft, written by the Team Lead, for factually accuracy and validate that the report is aligned with the review team's impressions and opinions of the school.

Verbal School Report Out/Debrief

The Team Lead will contact school leadership to schedule a time (within one week after the Two-Week Window) to verbally share the Review Team's initial findings, structured by classroom observations.

QSR Report

- The Team Lead drafts the QSR report.
- Members of the review team will review the report to ensure that it is factually accurate and aligned with the review team's impressions and opinions of the school. Corrections and suggestions for improvement are incorporated according to consensus.
- PCSB reviews and issues the final report to the Board Chair and school leadership.
- School leadership may prepare a written response to the QSR report to the Deputy Director of PCSB.
- The QSR report and the written response, if applicable, will become a permanent part of the school's record.
- The report will be used to inform charter renewals, charter reviews, ESEA Waiver reports, and to provide the Board with complementary evidence to support (or not) a Tier 3 PMF score.

Required Documentation

Checklist – _Pre-Visit_ documentation – due to PCSB electronically prior to the pre-visit meeting.	Submitted?
1. **Conflicts with Two-Week Window** that will affect classroom observations	
2. **Directions** to the school, including telephone number and any necessary parking instructions	
3. **Staff and Teacher Roster** that includes all teachers names, room numbers, subject and/or grade taught or administrative role, number of years teaching, and number of years teaching at the school (template in Appendix B)	
4. **Professional Development Calendar** for current school year	
5. **Master class schedule** that clearly indicates the subjects taught and times, teachers, and room assignments for all classes	
6. **Floor Plan** if this document will assist reviewers navigate your school	
7. **School Calendar** to include all non-school days, half days, assemblies, etc.	
8. **Governing Board Meetings** to include days, time, and location	
9. **Parent Events** to include days, times and location (daytime and evening events, if applicable)	

Responsibilities of the School Leader

Pre-Visit
A. Review the QSR Protocol and speak with the school leadership team to orient them to the purpose of the QSR. It is the expectation of the review team that all classrooms in the school will be available for observations.
B. After receiving the QSR Notification letter from PCSB, confirm the dates of the pre-visit meeting and the Two-Week Window within one week.
C. Review the required documentation list and gather the information the QSR team needs to submit for the pre-visit meeting. Send the documents to PCSB QSR Coordinator electronically. These documents will be used to prepare the QSR Review Team for the visits.
During the Unannounced Two-Week Window
A. Confirm with school staff that visitors will arrive announced to observe classrooms.

B. Provide front office staff with the list of possible visitors.	
After the Unannounced Two-Week Window	
A. Review the QSR report. Disseminate and discuss finding with constituent groups. B. School leader may prepare a written response to be sent to PCSB.	

PCSB & School Work Flow and Timelines

Pre-Visit	Timeline
PCSB: sends out scheduling letter to schools electronically. Pre-visit meeting dates and document request is attached	Two to three months prior to Two-Week Window
SCHOOL: confirms date for pre-visit meeting and unannounced two-week window	As soon as possible upon receipt
SCHOOL: prepares pre-visit documents and sends electronically to PCSB	Electronically submitted prior to pre-visit Meeting
PCSB: prepares QSR review teams and disseminates school information to the review team	Two-weeks prior to Two-Week Window
After Two-Week Window	**Timeline**
PCSB Team Lead (with input from team members): creates a draft QSR report, with evidence-based findings	Within one week after the Two-Week Window
PCSB QSR Review Team: reviews the draft report to ensure that it is factually accurate and aligned with the review team's impressions and opinions of the school	Within two weeks after the Two-Week Window
PCSB: issues the final QSR report to the Board Chair and school leadership that will also go in the school's permanent file and be used to evaluate the school's performance for high-stakes reviews (e.g. ESEA Waiver reviews, 5- and 10-year charter reviews, low PMF performance reviews), and charter renewal.	Within four to six weeks after the Two-Week Window
SCHOOL leadership: may prepare a written response to the QSR report that becomes a permanent part of the school's record	As soon as possible after the final report is issued

Appendix A

PCSB Qualitative Site Reviews Rubric

Updated July 2013

Components 2 – 3: Framework for Teaching Classroom Observation Tool

Citations:

1. Charlotte Danielson, The Framework for Teaching Evaluation Instrument, 2011
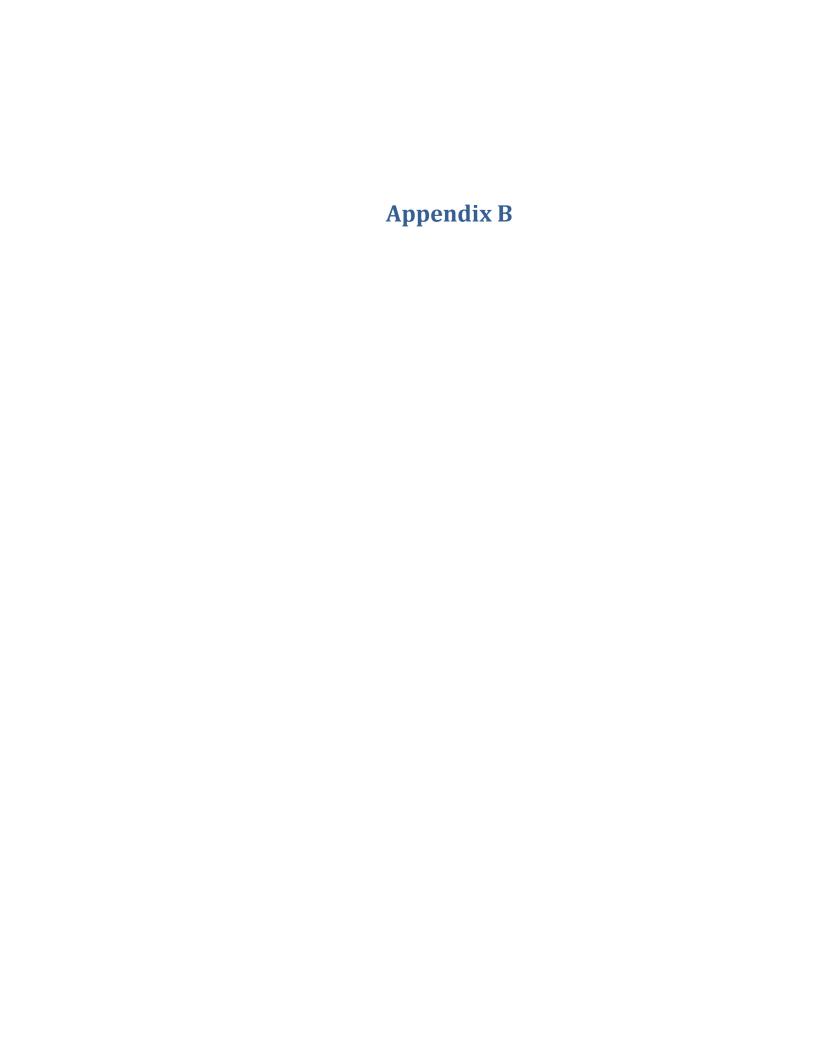
CLASSROOM ENVIRONMENT OBSERVATION RUBRIC

Class Environment	Limited	Satisfactory	Proficient	Exemplary
Creating an Environment of Respect and Rapport	Classroom interactions, both between the teacher and students and among students, are negative or inappropriate and characterized by sarcasm, putdowns, or conflict.	Classroom interactions are generally appropriate and free from conflict but may be characterized by occasional displays of insensitivity.	Classroom interactions reflect general warmth and caring, and are respectful of the cultural and developmental differences among groups of students.	Classroom interactions are highly respectful, reflecting genuine warmth and caring toward individuals. Students themselves ensure maintenance of high levels of civility among member of the class.
Establishing a Culture for Learning	The classroom does not represent a culture for learning and is characterized by low teacher commitment to the subject, low expectations for student achievement, and little student pride in work.	The classroom environment reflects only a minimal culture for learning, with only modest or inconsistent expectations for student achievement, little teacher commitment to the subject, and little student pride in work. Both teacher and students are performing at the minimal level to "get by."	The classroom environment represents a genuine culture for learning, with commitment to the subject on the part of both teacher and students, high expectations for student achievement, and student pride in work.	Students assumes much of the responsibility for establishing a culture for learning in the classroom by taking pride in their work, initiating improvements to their products, and holding the work to the highest standard. Teacher demonstrates as passionate commitment to the subject.
Managing Classroom Procedures	Classroom routines and procedures are either nonexistent or inefficient, resulting in the loss of much instruction time.	Classroom routines and procedures have been established but function unevenly or inconsistently, with some loss of instruction time.	Classroom routines and procedures have been established and function smoothly for the most part, with little loss of instruction time.	Classroom routines and procedures are seamless in their operation, and students assume considerable responsibility for their smooth functioning.
Managing Student Behavior	Student behavior is poor, with no clear expectations, no monitoring of student behavior, and inappropriate response to student misbehavior.	Teacher makes an effort to establish standards of conduct for students, monitor student behavior, and respond to student misbehavior, but these efforts are not always successful.	Teacher is aware of student behavior, has established clear standards of conduct, and responds to student misbehavior in ways that are appropriate and respectful of the students.	Student behavior is entirely appropriate, with evidence of student participation in setting expectations and monitoring behavior. Teacher's monitoring of student behavior is subtle and preventive, and teachers' response to student misbehavior is sensitive to individual student needs.

INSTRUCTIONAL DELIVERY OBSERVATION RUBRIC

Instructional Delivery	Limited	Satisfactory	Proficient	Exemplary
Communicating with Students	Teacher's oral and written communication contains errors or is unclear or inappropriate to students. Teacher's purpose in a lesson or unit is unclear to students. Teacher's explanation of the content is unclear or confusing or uses inappropriate language.	Teacher's oral and written communication contains no errors, but may not be completely appropriate or may require further explanations to avoid confusion. Teacher attempts to explain the instructional purpose, with limited success. Teacher's explanation of the content is uneven; some is done skillfully, but other portions are difficult to follow.	Teacher communicates clearly and accurately to students both orally and in writing. Teacher's purpose for the lesson or unit is clear, including where it is situation within broader learning. Teacher's explanation of content is appropriate and connects with students' knowledge and experience.	Teacher's oral and written communication is clear and expressive, anticipating possible student misconceptions. Makes the purpose of the lesson or unit clear, including where it is situated within broader learning, linking purpose to student interests. Explanation of content is imaginative, and connects with students' knowledge and experience. Students contribute to explaining concepts to their peers.
Using Questioning and Discussion Techniques	Teacher makes poor use of questioning and discussion techniques, with low-level questions, limited student participation, and little true discussion.	Teacher's use of questioning and discussion techniques is uneven with some high-level question; attempts at true discussion; moderate student participation.	Teacher's use of questioning and discussion techniques reflects high-level questions, true discussion, and full participation by all students.	Students formulate may of the high-level questions and assume responsibility for the participation of all students in the discussion.
Engaging Students in Learning	Students are not at all intellectually engaged in significant learning, as a result of inappropriate activities or materials, poor representations of content, or lack of lesson structure.	Students are intellectually engaged only partially, resulting from activities or materials or uneven quality, inconsistent representation of content, or uneven structure of pacing.	Students are intellectually engaged throughout the lesson, with appropriate activities and materials, instructive representations of content, and suitable structure and pacing of the lesson.	Students are highly engaged throughout the lesson and make material contribution to the representation of content, the activities, and the materials. The structure and pacing of the lesson allow for student reflection and closure.

Instructional Delivery	Limited	Satisfactory	Proficient	Exemplary
Using Assessment in Instruction	Students are unaware of criteria and performance standards by which their work will be evaluated, and do not engage in self-assessment or monitoring. Teacher does not monitor student learning in the curriculum, and feedback to students is of poor quality and in an untimely manner.	Students know some of the criteria and performance standards by which their work will be evaluated, and occasionally assess the quality of their own work against the assessment criteria and performance standards. Teacher monitors the progress of the class as a whole but elicits no diagnostic information; feedback to students is uneven and inconsistent in its timeliness.	Students are fully aware of the criteria and performance standards by which their work will be evaluated, and frequently assess and monitor the quality of their own work against the assessment criteria and performance standards. Teacher monitors the progress of groups of students in the curriculum, making limited use of diagnostic prompts to elicit information; feedback is timely, consistent, and of high quality.	Students are fully aware of the criteria and standards by which their work will be evaluated, have contributed to the development of the criteria, frequently assess and monitor the quality of their own work against the assessment criteria and performance standards, and make active use of that information in their learning. Teacher actively and systematically elicits diagnostic information from individual students regarding understanding and monitors progress of individual students; feedback is timely, high quality, and students use feedback in their learning.

Appendix B

Teacher Roster Template

Campus Name:

Please fill out the roster for all teachers including special education and ELL teachers (if Applicable).

Teacher Name	Content Area	Grade Level	Room Number	Years at School	Years Teaching	Team or Department Lead?

Appendix C

Sample Qualitative Site Review Report

DISTRICT OF COLUMBIA
PUBLIC CHARTER SCHOOL BOARD

\<Date\>

\<Board Chair's Name\>, Board Chair
\<Campus Name\>
\<Campus Address\>
\<Washington, DC Zip Code\>

Dear \<Board Chair\>:

The Public Charter School Board (PCSB) conducts Qualitative Site Reviews to gather and document evidence to support school oversight. According to the School Reform Act § 38-1802.11, PCSB shall monitor the progress of each school in meeting the goals and student academic achievement expectations specified in the school's charter. Your school was selected to undergo a Qualitative Site Review during the 2013-14 school year for the following reason(s):

- o   School eligible to petition for 15-year Charter Renewal during 2013-14 school year
- o   School eligible for 5-year Charter Review during 2013-14 school year
- o   School eligible for 10-year Charter Review during 2013-14 school year
- o   School designated as Focus/Priority by Office of the State Superintendent
- o   School had a Tier 3 rank on the Performance Management Framework during the 2012-13 school year
- o   School met less than 30% of targets in Accountability Plan during the 2012-13 school year

Qualitative Site Review Report
A Qualitative Site Review team conducted on-site reviews of \<Campus Name\> between \<Dates\>. The purpose of the site review is for PCSB to gauge the extent to which the school's goals and student academic achievement expectations were evident in the everyday operations of the public charter school. To ascertain this, PCSB staff and consultants evaluated your classroom teaching by using an abridged version of the Charlotte Danielson *Framework for Teaching* observation rubric. We also visited a board meeting.

Enclosed is the team's report. You will find that the Qualitative Site Review Report is focused primarily on the following areas: charter mission and goals, classroom environments, and instructional delivery.

We appreciate the assistance and hospitality that you and your staff gave the monitoring team in conducting the Qualitative Site Review at \<Campus Name\>. Thank you for your continued cooperation as PCSB makes every effort to ensure that \<LEA Name\> is in compliance with its charter.

Sincerely,

Naomi DeVeaux
Deputy Director

Enclosures
cc: School Leader

EXECUTIVE SUMMARY

School Name

CHARTER MISSION, GOALS, AND ACADEMIC ACHIEVEMENT EXPECTATIONS

This table summarizes <LEA Name>'s goals and academic achievement expectations as detailed in its charter and subsequent Accountability Plans, and the evidence that the Qualitative Site Review ("QSR") team observed of the school meeting those goals during the Qualitative Site Visit.

Mission and Goals	Evidence
Mission:	
Goals:	

CLASSROOM ENVIRONMENTS[3]

This rubric summarizes the school's performance on the Classroom Environments elements of the rubric during the unannounced visits. The label definitions for classroom observations of "limited", "satisfactory", "proficient" and "exemplary" are those from the Danielson framework. PCSB considers any rating below "proficient" to be under the standard of quality expected of DC charter schools. On average, XX% of classrooms received a rating of proficient or exemplary for the Classroom Environment domain.

Class Environment	Evidence Observed	School Wide Rating	
Creating an Environment of Respect and Rapport		Limited	%
		Satisfactory	%
		Proficient	%
		Exemplary	%
Establishing a Culture for Learning		Limited	%
		Satisfactory	%
		Proficient	%
		Exemplary	%
Managing Classroom Procedures		Limited	%
		Satisfactory	%
		Proficient	%
		Exemplary	%
Managing Student Behavior		Limited	%

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[3] Teachers may be observed more than once by different review team members.

Class Environment	Evidence Observed	School Wide Rating	
		Satisfactory	%
		Proficient	%
		Exemplary	%

INSTRUCTIONAL DELIVERY

This rubric summarizes the school's performance on the Instructional Delivery elements of the rubric during the unannounced visits. The label definitions for classroom observations of "limited", "satisfactory", "proficient" and "exemplary" are those from the Danielson framework. PCSB considers any rating below "proficient" to be under the standard of quality expected of DC charter schools. On average, XX% of classrooms received a rating of proficient or exemplary for the Instructional Delivery domain.

Instructional Delivery	Evidence Observed	School Wide Rating	
Communicating with Students		Limited	%
		Satisfactory	%
		Proficient	%
		Exemplary	%
Using Questioning and Discussion Techniques		Limited	%
		Satisfactory	%
		Proficient	%
		Exemplary	%
Engaging Students in Learning		Limited	%
		Satisfactory	%
		Proficient	%
		Exemplary	%
Using Assessment in Instruction		Limited	%
		Satisfactory	%

Instructional Delivery	Evidence Observed	School Wide Rating	
		Proficient	%
		Exemplary	%