



Tennessee Department of Education

# School Site Visits

Authorizer Toolkit | August 2026



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# School Site Visits

School site visits are one of the most powerful tools authorizers have for understanding how a school is functioning beyond what quantitative data can show. While performance frameworks, financial audits, and compliance submissions provide essential information, they cannot fully capture the lived experiences of students, teachers, and families. Thoughtful, differentiated site visits provide authorizers with important qualitative contexts that support early intervention, continuous improvement, and sound decision-making at renewal.

Site visits should align to the charter agreement and the authorizer’s adopted performance framework, respect school autonomy, and minimize unnecessary disruption. When implemented well, site visits strengthen relationships, clarify expectations, and provide schools with feedback that supports meaningful improvement while maintaining the integrity of accountability systems required by law.

## Purpose of School Site Visits

School site visits provide a structured method of collecting neutral, objective evidence aligned to the performance framework. They allow authorizers to:

- Gather qualitative information that cannot be obtained through documents or data collections.
- Triangulate evidence from annual reporting, financial reviews, and academic data.
- Identify early Indicators of Distress (IODs) before they escalate into more significant concerns.
- Understand fidelity to the approved charter, including program implementation, school culture, and governance practices.
- Assess readiness (for new schools), progress (for existing schools), or trajectory (for schools approaching renewal).
- Support transparency and fairness in renewal, non-renewal, and intervention decisions.
- Verify compliance in key areas, such as special education documentation, background checks, etc.

## Guiding Principles for School Site Visits

High-quality school site visits should:

- Align directly with the authorizer’s adopted performance framework and the school’s charter agreement.

## School Site Visits

- Occurs in the first year of operation for every new school.
- Take place at least annually with frequency adjusted based on school performance, identified risks, and district capacity.
- Vary in length, depth, and scope depending on a school's age, context, and record of accomplishment.
- Provide predictable expectations through pre-visit communication and transparent post-visit reporting.
- Respect charter autonomy, keeping observations focused on outcomes and contract expectations, not prescribing instructional models or methods.
- Minimize operational interference by scheduling visits with adequate notice and avoiding high-stakes moments (testing windows, major school events, etc.).
- For greater efficiency, consider coordinating this visit with other necessary visits to minimize the burden on the school.

## Why Differentiated Site Visits Matter

Not all schools need the same level of onsite support. Differentiation is a key component of professional oversight, signaling to schools that the authorizer values their time, trusts their work when warranted, and responds proportionally to performance trends or compliance issues.

Differentiation allows the authorizer to:

- Focus resources where the needs are greatest.
- Reduce the burden on high-performing schools.
- Tailor evidence collection to a school's current developmental stage.
- Detect problems early through targeted visits aligned to Indicators of Distress.
- Avoid a one-size-fits-all approach that can undermine autonomy or overwhelm schools.
- Allow for targeted attention when outcomes indicate greater scrutiny is appropriate without enforcing similar requirements on high-performing charter schools.

## Types of Site Visits

Site visits are a cornerstone of effective charter school authorization. A comprehensive oversight approach includes multiple types of visits—such as foundational visits to support new schools, annual academic and operational visits to monitor ongoing performance, targeted or issue-based visits to address specific concerns, renewal-year visits to inform high-stakes decisions, and collaborative learning visits to promote shared best practices. Together, these differentiated approaches ensure that the school is functioning so that all students are on a path to success.

| Types of Site Visits                                                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|-----------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Foundational Visits (New School Year 0–1)</b>                      | <p>These visits ensure a new school is launching strong and meeting foundational expectations. They help identify concerns early, before they become embedded practices, and focus on:</p> <ul style="list-style-type: none"> <li>• Leadership stability and school culture</li> <li>• Instructional readiness</li> <li>• Governance functionality</li> <li>• Enrollment and staffing accuracy</li> <li>• Compliance readiness (e.g., Special Education processes, safety protocols)</li> <li>• Early indicators of operational or academic distress</li> </ul>                                                                                                                                |
| <b>Annual Academic &amp; Operational Visits (Standard Monitoring)</b> | <p>These visits support routine oversight aligned to the authorizer’s adopted performance framework. These visits contribute to annual reporting and help track progress over time and typically include:</p> <ul style="list-style-type: none"> <li>• Classroom observations calibrated to the school’s instructional model</li> <li>• Review of student learning conditions and school culture</li> <li>• Interviews with school leadership, teachers, staff, parents, and students</li> <li>• Examination of key organizational systems (governance, data use, student supports, financial practices)</li> <li>• Analysis of alignment between reported data and onsite evidence</li> </ul> |
| <b>Targeted or Issue-Based Visits (Risk-Based Monitoring)</b>         | <p>These visits can be initiated by emerging performance concerns, IOD, or federal designations which require visits from TDOE. Examples include:</p> <ul style="list-style-type: none"> <li>• Sudden leadership turnover</li> <li>• Declining interim academic performance</li> <li>• Enrollment instability or high attrition</li> </ul>                                                                                                                                                                                                                                                                                                                                                     |

| Types of Site Visits                                                |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
|---------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                                                     | <ul style="list-style-type: none"> <li>• School climate concerns</li> <li>• Organizational dysfunction or governance red flags</li> <li>• Financial stress signals</li> <li>• Federal designations such as TSI, ATSI, and CSI.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| <b>Renewal-Year Visits (High-Stakes Evaluation)</b>                 | <p>These are deeper visits that assess a school's performance across the entire charter term. Because renewal decisions represent one of the authorizer's most critical responsibilities, renewal-year visits must be thorough, well-organized, and conducted with clear rubrics. They should:</p> <ul style="list-style-type: none"> <li>• Examine long-term trends in academic, financial, and organizational performance</li> <li>• Collect holistic evidence to inform renewal recommendations</li> <li>• Include meetings with governing board members, school leadership, teachers, and—in some cases—families and students</li> <li>• Observe classroom instruction</li> <li>• Review documents such as Individual Education Program's and service logs, Section 504 plans, English learner student records, and Individual Learning Plans, student cumulative records, employee files, school policies such as discipline or safety.</li> <li>• Verify fidelity to the approved charter model</li> <li>• Assess sustainability and capacity for the next charter term</li> </ul> |
| <b>Collaborative Learning Visits (Optional, Relationship-Based)</b> | <p>Some authorizers offer optional visits where schools request feedback on specific aspects of their model or program. These visits are not evaluative in nature. They reinforce trust</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |

| Types of Site Visits |                                                                                                                                                                                                                                                                                                                                                        |
|----------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                      | <p>and underscore that the authorizer's primary aim is to support high-quality outcomes for students, not just enforce compliance. They are:</p> <ul style="list-style-type: none"><li>• Voluntary</li><li>• Forward-looking</li><li>• Focused on continuous improvement</li><li>• Transparent about the line between support and evaluation</li></ul> |

## Core Components of Every Site Visit

Regardless of type, all site visits should include the same four core components, which are detailed below.

### Pre-Visit Communication and Review

Before the site visit, a written overview outlining the purpose, scope, schedule, and any requested documents should be provided to the charter school with sufficient advance notice to allow adequate time to prepare.

**Purpose:** The pre-visit communication should include the purpose, scope, and a tentative schedule for the day.

**Plan for dates:** When scheduling, be sure to consider important dates such as holidays, testing, professional development, and the leadership team's availability.

**Point of contact:** The pre-visit communication is an ideal opportunity to request a point of contact for the site visit and a list of the individuals that will be included in the site visit.

**Pre-visit documents and review:** A list of documents to submit prior to the visit and how to submit them should be included in the pre-visit communication. A deadline to submit the documents will allow time for the authorizer to review. The following are examples of items that might be requested.

- Master schedules
- Organizational charts
- Professional development schedules
- Staff directory or employee list

## School Site Visits

- Teacher certification list
- Intervention schedules
- Enrollment data

Once all documents are submitted, authorizers should review the pre-visit documents. This will help familiarize the authorizing staff with the organizational structure and programs before the site visit.

**Required site visit documents:** Any documents that will be reviewed during the site visit should be provided in the pre-visit communication. The following are examples of documents that might be reviewed during the site visit.

- Map of the school for classroom observations
- Curriculum documents
- Lesson plans
- Assessment documents or logs
- Samples of student work
- Evaluations
- Policies and procedures

## Onsite Evidence Collection

During the site visit, it is important to collect evidence of what is going on in the school environment. The following are examples of evidence that might be collected during the site visit:

- Classroom observations calibrated to the school's model and the performance framework
- Walkthroughs of learning environments, common spaces, and arrival/dismissal processes
- Review of documentation relevant to the visit type (e.g., governance minutes, SPED files, safety logs)
- Interviews or focus groups with relevant stakeholders
- Observation of instructional systems, data use, and student supports

## Post-Visit Debrief

Schedule time at the end of the site's visit to briefly summarize initial impressions, observations, and next steps. This debrief should not assign ratings or state any conclusions.

### Written Site Visit Report

A transparent, objective summary aligned to the performance framework indicators should be delivered in a timely manner and shared with both the school leader and governing board.

The authorizer might want to develop a rubric to use after the site visits are conducted. Using a rubric offers a structured and objective way to score by outlining clear criteria for evaluation. It removes uncertainty for the reviewer, ensures consistent standards are applied to every person or item, and leads to feedback that is specific and actionable.

If the report reflects that intervention is necessary, the authorizer may also want to keep the district's board and leadership informed.

### Providing Feedback

Feedback should describe what is observed, not prescribe how the school must change it. Schools should be encouraged to develop their own strategies that are aligned with their charter agreement when they address identified concerns from the authorizer. However, in some cases, feedback may be more prescriptive, particularly when there are concerns related to student safety or potential harm, requiring clear and immediate guidance for corrective action. Authorizers might want to pre-plan for situations that require more prescriptive feedback.

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# Appendices

## Appendix A: Sample Site Visit Protocol



### First Annual Site Visit Protocol To be Conducted Annually in September/October

**Purpose:** The authorizer and charter school will collaborate to celebrate the success of the charter school, identify support needs, observe instructional practices, and gather information defined in the Performance Framework, to ensure a high-quality environment for Knox County students.

#### Authorizer Responsibilities:

- Confirm date and time of meeting with charter school
- Confirm KCS representatives who will attend the site visit, if possible
- Review the most current summative assessment data
- Review and reflect upon quality authorizing standards to better support the school

#### Charter School Responsibilities:

- Provide formative assessment data (optional)
- Identify classrooms to be visited
- Provide time for an informal school leader conversation that includes a discussion of:
  - progress toward goals in Charter School Agreement,
  - school strengths and opportunities for growth,
  - identification of areas for increased authorizer support, and
  - any other information the school leader wishes to share.
- Share the following documents:
  - Master Schedule detailing instructional day/minutes
  - Assessment Schedule
  - Employee Handbook (Revisions)
- Conduct a walkthrough of the school that includes:
  - Classroom Visits:
    - General Education - select one for each grade band:

## School Site Visits

- Primary grades (Literacy focus)
  - 3rd or 4th grade (Literacy focus)
  - Middle grades (Math focus)
  - Related Arts
- Demonstration of:
  - Handling student information
  - Compliance with health and safety requirements
- Demonstration of processes for ensuring the rights of all students, including Special Education, ELL, Gifted & Talented, Migrant, and Homeless
  - Sampling of:
    - Documentation for background checks
    - Documentation of compliance with employee rights (FMLA, ADA)
    - Staff credentials such as licenses and diplomas
  - Other areas the school would like to highlight



## **Second Annual Site Visit Protocol To be Conducted Annually in March**

**Purpose:** The authorizer and charter school will collaborate to celebrate the success of the charter school, identify support needs, observe instructional practices, and gather information defined in the Performance Framework, to ensure a high-quality environment for Knox County students.

### **Authorizer Responsibilities:**

- Confirm date and time of meeting with charter school
- Confirm KCS representatives who will attend the site visit, if possible
- Conduct a self-reflection of authorizer support based on feedback provided by the charter school during the first site visit

### **Charter School Responsibilities:**

- Provide formative assessment data (optional)
- Identify classrooms to be visited
- Informal school leader conversation that includes:
  - Updates toward achieving goals in Charter School Agreement
  - School strengths and opportunities for growth
  - Identify areas for increased authorizer support
  - Any other information the school leader wishes to share
- Conduct a walkthrough of the school that includes:
  - Classroom Visits:
    - ELL Class
    - Special Education Classroom
    - Speech and Language Support
    - Special Areas?
  - Demonstration of:
    - Compliance with educational requirements
      - 3rd grade retention law plans & summer camp
    - Meeting financial reporting and compliance
    - Following generally accepted accounting principles

## School Site Visits

- Compliance with governance requirements
- Holding management accountable
- Compliance with reporting requirements
- Compliance with facility requirements
- Compliance with health and safety requirements
- Compliance of all other obligations
- Testing protocols

## Appendix B: NN4DA TN Site Visit Report Template



[ADD LOGO HERE]

[SCHOOL NAME]

Site Visit Report

[DATE OF VISIT]

### Introduction and Purpose

As part of its authorizing responsibilities, [AUTHORIZER NAME] conducts site visits at each of its charter schools annually. During these visits, the site visit team observes classrooms and leads focus groups with a variety of stakeholders, including school leaders, teachers, board members, students, and parents. The information collected during the site visits is used as qualitative evidence and incorporated within the overall monitoring and evaluation of the school each year, as seen in the annual reports.

The site visit team consisted of the following individuals:

NAME, ROLE

NAME, ROLE

### Summary of Findings

Based on the information collected during the site visit, the site visit team identified the following areas of strength and areas for improvement:

- Areas of Strength:
- Areas of Improvement:

### Academics

[Summarize findings and connect to the performance framework]

## **School Site Visits**

### **Organization**

[Summarize findings and connect to the performance framework]

### **Finance**

[Summarize findings and connect to the performance framework]

### **Next Steps**