



## Required Evaluation Visit Pre-Visit Document List

Please find the list of pre-visit documents for the evaluation visit below. These documents will help inform the pre-visit call, as well as the visit conduct. Please note that the first few requests have a specific template available on the Institute's [School Site Visit](#) webpage. The Institute will set up Epicenter for school document submissions by the deadline outlined in the visit email.

### SUNY Templates

- **At-Risk Programs Chart.** Complete and submit the Institute's form detailing the school's program(s)/requirement(s) for general education students struggling academically, students with disabilities, and English language learners. Please provide information on the programmatic elements, staff who work with the students, student identification procedures, staff coordination requirements, program effectiveness, and the professional development activities the school provides to school staff. The template for this document is available on the Institute's website at [this link](#).
- **Curriculum Overview Chart.** Complete and submit the Institute's form detailing the school's core curricular programs for each core subject area (ELA, mathematics, science, and social studies). The template for this document is available on the Institute's website at [this link](#).
- **Teacher Certification and Staff List.** Use the Institute's spreadsheet template available at [this link](#). Please complete each tab with the following information:
  - **Certification.** This section details each current teacher's certification, teaching area, and experience. The Institute recognizes that teacher rosters are subject to change at the beginning of the school year and asks that school leaders highlight these changes during pre-visit discussions with the Institute's visit team leader. Please include at-risk program staff members' information on the "Special Populations" tab and include the school's special education coordinator.
  - **Staff Directory and Employee List.** Provide a complete staff directory that includes each person's room/office number; for teachers, also include grades and subjects taught. In addition to teachers, the directory should list ALL non-instructional staff, including persons in the school who may not be employees, such as special education contractors, volunteers, or cafeteria and security personnel utilized by the school.
- **Visit Data Collection Form.** Complete and submit the Institute's Visit Data Collection Form requesting student enrollment, staff retention, and discipline data. The template for this document is available on the Institute's website at [this link](#).
  - **Virtual Access Information.** For the visit, the Institute will request additional documents for site-based review. Please create a temporary log-in to the school's document sharing platform and include login information on the Visit Data Collection Form. This might include Google Drive, Box, SharePoint, or other platforms.

- **Data Verification Process.** To ensure the Institute is reporting accurate data regarding enrollment and other information from BEDS and other state sourcing, the Institute will share the data visuals for the report with the school for verification via Epicenter. The Institute's Performance and Systems team will communicate with the school the timeline for this task.

### Program Documents

- **Assessment Calendar and Analysis.** Provide a calendar with a comprehensive list of assessments the school has conducted or will conduct for the current school year. Please also provide a ***brief summary*** of the school's results at the time of the submission. In the summary, please include high-level information and any specific steps the school takes in response to student achievement data.
  - **Please include responses to the following questions within this submission:**
    - Ensure each assessment is labeled with its use (i.e., diagnostic, formative, summative).
    - Describe how the organization uses student data to drive instructional decisions.
    - Describe how the school reviews student data to address student equity issues in sub-populations.
- **Board Materials.** Provide the following information:
  - the most recent, complete evaluation for any employee(s) who report(s) directly to the board of trustees (include the evaluation criteria for those employees); and,
  - data dashboards or other means by which the board monitors the school's progress.
- **Evaluation Templates.** Send the templates that the school uses to evaluate teachers and leaders as well as any supporting guidance documentation for the school's evaluation systems. The school should be prepared to share finalized evaluations from the most recent school year with the visit team during the school visit, if requested.
- **Organizational Chart.** Provide a chart that includes all staff members and illustrates the school's current reporting structure. It need not name individual staff members, but it should reflect all positions in the school and include relationships with any management company or charter management organization. Please ensure the organizational chart is an accurate representation of the school's current staffing and reporting structures.
- **Professional Development Calendar.** Provide a copy of the school's professional development calendar for the current school year. Please note if the school canceled any planned sessions.
- **Teacher Schedules/Master Schedule.** Provide schedules that clearly indicate where each teacher will be and what subject and grade they will teach during each scheduled period on the day(s) of the visit. Please highlight common planning time, grade team and/or department meetings as well as other non-instructional time (individual prep, lunch, etc.) or any staggered scheduling. Please include a bell schedule and a whole school lunch/specials schedule to help inform the Institute's observation schedule. To facilitate scheduling, please clarify class names and locations. If a teacher's schedule

contains class names for internal purposes such as “Harvard” or “801B,” please provide an explanatory key.

- The Institute uses this information to guide classroom observations during the visit. The Institute recognizes that teacher schedules are subject to change after the start of the school year and asks that school leaders highlight these changes during pre-visit discussions with the Institute’s visit team leader.

### **Additional Document Requests for the Evaluation Visit**

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During the pre-visit call and follow up communication, the Institute visit team will identify additional documents for the school to share with the team to support the team in evaluating aspects of the school’s programming. These requests will vary from school to school, and the visit lead determines specific requests based on a review of the school’s submitted pre-visit documents.

If the school has documents/artifacts that the visit team *does not request*, the school is always offered the opportunity to share items with the team. Ahead of the visit, please specify items that the school wishes to share with the visit lead.

To share items with the Institute, the Institute’s preference is for electronic access to reduce paper waste and efforts for producing hard copies. If an item exists only in hard copy format, please do not make the effort to scan and share, but have the documents available during the visit. The Institute will review any and all materials shared via the school’s document sharing platform, with temporary access information shared in the **Visit Data Collection Form** (see above for directions).

Sample requests may include:

- **Lesson plans**
- **Assessment documentation**
- **Professional development artifacts**
- **At-Risk program materials**
  - **Individualized Education Programs (“IEPs”)**
  - **Progress monitoring tools**
  - **Additional individualized student programming documentation**
- **Student work samples**