### This guidance document provides an overview of the onsite process and supports Sponsoring Organizations (SO) in preparing a for an onsite visit.

### **Review Team**

The members of the review team are listed below. Please see their individual review team [logistics sheets](http://www.doe.mass.edu/edprep/toolkit/1819/logisiticsform.pdf) for more detailed information about each reviewer’s specific needs.

| Name | Title | Role on Visit | Hotel | Parking |
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### **Overview**

The onsite visit typically spans three days. The first day of the onsite visit consists of the welcome meeting, focus groups and interviews, as well as review team work time. The second day consists of focus groups, interviews, and review team work time. The third day is primarily a work day for the review team followed by an exit meeting to conclude the onsite visit. See the [example agenda](#_Example_Agenda:_Day) for a full sense of a typical visit. It is important to note that all schedules are tailored to the specific needs of the organization and review team. Guidance provided below is also adjusted to each individual review. All organizations should consult with their ESE specialist prior to beginning detailed planning efforts related to the onsite visit. Organization-specific guidance is released to an organization approximately two months prior to the onsite visit.

The information that follows will provide a sense of the different components of an onsite visit. Please consult with ESE for specific questions pertaining to your upcoming review. Below you will find an outline of guidance for:

* [The Welcome & Exit Meetings](#_Welcome_&_Exit)
* [Interviews & Focus Groups](#_Interviews_and_Focus_1) with:
  + [Organizational Faculty and Staff](#_Organization_Level_Interviewees)
  + PK-12 Partners
  + [Candidates and Completers](#_Candidate/Completer_Focus_Groups)
  + [Satellite Location Stakeholder Groups](#_Satellite_Location_Focus)
* Other sources of evidence reviewed onsite:
  + [Candidate Artifacts](#_Review_of_Candidate_1)
  + [Course Observations](#_Course_Observations)
* Important logistical information pertaining to:
  + [Food/Travel/Accommodation Costs](#_Food/Travel/Accommodations:)
  + [Reviewer Workroom Setup](#_Review_Team_Workroom:_1)
  + [Tips for a Successful Visit](#_Tips_for_a)

### **Welcome & Exit Meetings**

These meetings commence and conclude the visit. The Sponsoring Organization leads the welcome meeting; the ESE State Specialist leads the exit meeting. During the 45 minute welcome meeting, the Sponsoring Organization will have the opportunity to greet the review team and provide a brief orientation about educator preparation at the organization. This is your opportunity to provide the review team with information you feel is necessary to understand the work of your organization in preparing educators. During the Welcome Meeting, topics covered should include, but are not limited to, the following:

* + SO Mission Statement, organizational type/structure, basic program information
  + Anything that is new or has changed at the SO since submitted offsite documentation, or any additional examples beyond what was included in the submission
  + Information about the SO’s PK-12 Partnerships, such as what Partnerships look like for the SO and any data on improved outcomes for PK-12 students as a result of the Partnerships
  + Information about the SO’s approach to diversity and working to recruit and admit candidates that result in the increased racial and ethnic diversity of completers in the workforce

We request that any visuals/presentations shared during the welcome meeting should be shared in soft copy to the review team. Representation from the SO at the welcome meeting is up to the SO but must include at least the review designee. Any members of leadership that wish to speak to the review team should join the welcome meeting.

At the exit meeting, the State Specialist will conclude the visit by providing a brief overview of the work completed by the review team and outline the next steps in the review process. The State Specialist will **not** share preliminary findings, commendations, or approval recommendations during this meeting. The review team continues conducting evidence analysis and rating calibrations after the onsite visit so it is premature to indicate the outcomes of the review at this point.

### **Interviews and Focus Groups**

These sessions are 60 minutes each and compose the bulk of the time spent onsite. They include both open-ended response questions and the use of live polling technology. Reviewers use a pre-set script during each interview to ensure consistency across interviews and organizations.

SOs are responsible for securing participation in the focus groups. To support a successful visit, it is important that the SO maximizes the number of participants in each focus group. Although it is up to the SO to determine how to secure participants, ESE has heard from organizations that the following strategies have contributed to their success in driving focus group participant attendance:

* Send out save the dates early
* Have faculty do personal outreach
* Have completers do outreach to their peers
* Offer refreshments and parking
* Schedule the focus groups before, during, or after a class block or prior to another campus event
* Note: In response to feedback, we are now conducting focus groups later into the evening on Day One to accommodate to completers’ and Supervising Practitioners’ schedules, such that they can attend after work commitments. We encourage you to use the opportunity to schedule focus groups at times when your stakeholders indicate they are most likely able to attend.

### **Organization-Level Interviewees and Focus Groups**

We recognize some personnel may be involved in more than one of the groups listed below. In these cases, please inform the Ed Prep Specialist coordinating your review so they can make the appropriate adjustments.

| Category | Specific Group | Notes |
| --- | --- | --- |
| Field Placement Staff | Placement Staff/Coordinator(s) | In this interview, we would like to speak to all staff members who manage field placements at the organization. |
| Program Supervisors | As many as possible (minimum of six, maximum of 25) |
| Faculty Groups | Full-time | As many as possible (minimum of six, maximum of 25) |
| Adjunct/Part-time | As many as possible (minimum of six, maximum of 25) |
| Arts & Sciences | As many as possible (minimum of six, maximum of 25) |
| PK-12 Partners | Partners  (principals, supt., district personnel) | As many as possible (minimum of six, maximum of 25):  Partners should be representative of schools/districts with high placement and employment rates. |
| Supervising Practitioners | As many as possible (minimum of six, maximum of 25):  Please keep in mind, the larger the sample in the group, the more representative it will be of the SO’s work with Supervising Practitioners. |
| Satellite Programs | See [Satellite Focus Groups](#_Satellite_Locations_1) below for additional details | |

### **Candidate/Completer Focus Groups**

In addition to the interviews and focus groups listed above that are focused on Organization-level domains, ESE will conduct focus groups that collect information from all programs under review. It is essential that each program group is represented onsite during the focus groups so ESE can better understand the experience for candidates from each program or program grouping at the SO. To facilitate this, we will set minimum thresholds for the number of candidates/completers we need to hear from for each program or program group. It is essential that the SO meets the minimum number of participants per program/program grouping outlined in the table below. The evidence generated from each program/program group will be considered evidence of impact and will help inform determinations made during the review.

| Program/Program Group | Minimum Number of Participants |
| --- | --- |
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Some programs/program groups may be grouped further for purposes of scheduling the focus groups. For instance, it is possible to run a focus group with both Elementary and Early Childhood candidates assuming the combined number of participants does not exceed 25. Specialists will work with individual organizations to propose focus groups that maximize flexibility and are appropriate to the programs’ design and structure.

| Proposed Focus Groups | Length |
| --- | --- |
|  | 60 mins. |
|  | 60 mins. |

As stated previously, SOs are responsible for securing participation in the focus groups. To support a successful visit, it is important that the SO maximizes the number of participants in each focus group. We encourage the SO to actively recruit *candidates who have experienced the majority of their program of study and who have entered their practicum*. Furthermore, it is best practice for the SO to recruit and ESE to hear from *recent completers* (completed within the past three years) given they have completed the full program and will have insight from their experience overall.

In addition to targeted outreach, SOs must advertise the opportunity to participate in the focus groups to all currently enrolled candidates and recent completers (within the last three years). The following language may be used in the recruitment of candidates and completers for participation in focus groups. Each SO may develop its own solicitation announcement, but must include the highlighted language below. SOs must provide proof to ESE that all currently enrolled candidates and recent completers (within the last three years) have been invited to the focus groups.

| *Example Announcement Language*  *[NAME OF SPONSORING ORG]’s preparation programs are currently undergoing review by the Department of Elementary and Secondary Education. All preparation providers must undergo periodic review by the state in order to maintain the ability to endorse candidates for licensure in Massachusetts. On [INSERT DATE of VISIT], a review team will be visiting [NAME OF SO] to conduct observations and focus groups. All current candidates and recent completers are invited to participate in these focus groups in order for reviewers to learn about your preparation experience.*  *If you are interested in participating in a focus group, please contact [SO decides how folks should indicate interest] by [deadline for participating].*  *The Department of Elementary and Secondary (DESE) Ed Prep Team works to guarantee that preparation in Massachusetts results in effective educators ready to support the success of all students. For more information about the review of preparation providers in the Commonwealth please visit the* [*Educator Prep Web site*](http://www.doe.mass.edu/edprep/)*.* |
| --- |

### **Satellite Location Focus Groups**

ESE reserves the right to visit any/all satellite locations for a separate focus group or observation. This visit may be conducted outside of the established onsite dates. The table below indicates proposed focus groups and dates at your organizations’ satellite campus(es). In addition to the focus groups held on the main campus, the proposed focus groups below must also have representation of candidates/completers from each program/program grouping offered on that campus.

Satellite Candidate/Completer Focus Groups

| Satellite Location | Program/Program Grouping | Proposed Date/Time | Minimum Number of Participants |
| --- | --- | --- | --- |
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Satellite Organizational Stakeholder Focus Groups

| Satellite Location | Stakeholder Groups | Proposed Date/Time | Minimum Number of Participants |
| --- | --- | --- | --- |
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### **Review of Candidate Artifacts**

[Candidate artifacts](http://www.doe.mass.edu/edprep/advisories/Retention.pdf), or candidate records retained for the purposes of formal program review, are one source of evidence reviewed onsite. As a part of the formal review process, ESE reviews the information contained in a random sampling of candidate artifacts. Under previous review guidelines, ESE would review candidate files for many of these artifacts (see categories below). We have recognized, however, that the best source of evidence for several criteria may not be contained in the candidate files. Therefore, we ask each SO to pull together a set of artifacts in the categories below - some of which may be in candidate files, some which will not. ESE may access the artifacts electronically or in hard copy. If the files are made available during the onsite visit, a representative for the Sponsoring Organization should be prepared to orient ESE to the candidate artifacts. If the candidate artifacts can be made available electronically (e.g., CAP online platform), ESE may review the artifacts in advance. This will help streamline the onsite visit; please let your Specialist know whether or not the files are available electronically.

Please organize each category of artifact separately. For example, reviewers would see one set of documentation in the advising category and review the content verification documentation separately. The documents should be further organized by individual candidate.

ESE has generated a [random sample of candidates](#_ESE_Review_Random_1) which is provided at the end of this document. The following table indicates the categories of artifacts that ESE will review in the candidate files.

| Artifact Category | Description | Sample | # Required |
| --- | --- | --- | --- |
| Advising | Evidence of the advising candidates received throughout the program (e.g., advising files, hand written logs, e-mail records.) All artifacts should be organized in one place for each candidate in the sample. | ESE | 15 |
| Performance Assessment | Completed performance assessment (e.g., the Candidate Assessment of Performance, Performance Assessment for Leaders , or other end of program assessment). For CAP, please include the following required CAP forms:   * CAP form, * CAP observation form for all required observations, * student feedback instruments, * formative assessment form, * and the summative assessment form. | ESE | 15 |
| Practicum Hours | Evidence of the hours (including hours of full responsibility) candidates completed during practicum. This can be captured in the CAP cover forms or other performance assessment cover sheets. | ESE | 15 |
| Practicum Observations | Evidence that demonstrates the type of feedback provided to candidates based on at least 3 observations conducted by Program Supervisor/Supervising Practitioner. This artifact can be captured via the CAP observation form for all required observations. | ESE | 15 |

In addition to the artifacts above, provided for the list of randomly generate candidates, the SO should also include the artifacts below. The SO determines the sample for the categories of artifacts included in the table below.

| t Category | Description | Sample | # Required |
| --- | --- | --- | --- |
| Content Verification for Post-Baccs | If your organization verifies content knowledge at the point of admission (for applicable post-baccalaureate programs), include documentation showing execution of organization’s process for ensuring candidates have the content knowledge for their appropriate license (the organization’s process for content verification should be clearly outlined in the Candidate Worksheet, prompt 2c). | SO | 15 |
| Waivers | Documentation showing execution of the waiver policy (the waiver policy should be included as a part of the Candidate Domain submission). | SO | 15 |
| Candidates at risk | Documentation of process for identifying, supporting, and (possibly) counseling out candidates who are not meeting standards (the organization’s process for working with candidates-at-risk should be clearly outlined in the Candidate Worksheet, prompt 4a). | SO | 15 |

ESE reserves the right during the visit to ask for additional artifacts – either in type or for specific candidates. For additional guidance, please see the [Candidates Record Retention Advisory](http://www.doe.mass.edu/edprep/advisories/Retention.pdf).

### **Course Observations**

The review team may select courses to observe. In support of this, please provide a schedule of educator preparation program coursework offered during the dates of your onsite visit. ESE will accept any format (word, excel, pdf, etc.) of the schedule, but it must include the following information:

* Course Name
* Course Code (if applicable)
* Instructor
* Location
* Ed Prep Candidates (e.g. Math 5-8, Elementary, All, etc.) we are most likely to find in this course

### **Other Logistics**

To support a productive onsite visit and ensure that the review team is able to effectively do their work, the following are additional guidelines around food and travel accommodations, reviewer workspace, and technology set up.

### **Food/Travel/Accommodations**

* + Food/Beverages: Please plan to provide **all meals** during the duration of the onsite visit
    - See individual Review Team Logistics Sheets for allergy information.
      * Breakfast (including coffee) should be provided in workroom at the start of each day.
        + On the first and second day, please make coffee and snacks available in the workroom at the start of the workday.
        + On the third day, please plan to provide breakfast for the review team as the work day starts earlier.
      * Water should be available for the review team all day.
      * Lunch and dinner should be provided to the review team in the workroom each day. SOs may order boxed dinners for the review team.
  + Travel
    - Please plan to coordinate and cover the cost of parking needs for the review team. We recognize this is challenging in several locations and appreciate your efforts to secure accessible parking for the duration of the onsite visit.
    - It is not the expectation that SOs reimburse mileage for reviewers to and from the onsite visit.
  + Accommodations
    - Reviewers staying in hotels will do so beginning the day of the first onsite visit date and check out the morning of the last onsite visit date. If reviewers are required to travel 1.5+ hours, he or she may need to check in to the hotel the night before the first onsite day.
      * See individual Review Team Logistics Sheets for accommodation needs.
    - We understand onsite visits can be costly for SOs; they are also costly for ESE. To support the sustainability of ongoing review work, we ask that SOs remain within the following limits:
      * If the SO is in Greater Boston, hotel costs for the onsite visit should be less than $300 per person per night.
      * If the SO is outside of Boston, hotel costs for the onsite visit should be less than $200 per person per night.
    - ESE will pay for the cost of accommodations for any ESE staff participating in the review, but asks that you still make the reservation.

### **Review Team Workroom**

* + Room Setup
    - Due to the size of the review team, ESE prefers a workroom that is set up in a conference room style. This space should be available to the review team during the duration of the onsite visit for review team meetings, work blocks, and debriefing. The welcome meeting and exit meeting may also be scheduled in this workroom.
    - Review teams have ranged from seven to ten individuals. Workroom setups we have found to be most conducive for the review team include:
      * Projection capabilities (e.g., projector, smart board, screen to project, blank wall to project)
      * A conference table in the center of the room with sufficient space for reviewers to spread out during work time
        + Alternatively, a table large enough for the review team in one part of the room, with additional tables in other parts of the room for reviewers to spread out during individual work time
      * Access to the same work room all day throughout the entire visit, including space where the review team can lock up technology at night
    - On the last day of the visit, the review team would benefit from an additional small room near the workroom where the team can conduct one-on-one meetings.
  + Wireless Access
    - Please establish stable wireless connections for the review team. Guest access that requires continued registration/log-on is insufficient.
    - An IT specialist should be on-hand to ensure that the review team is able to access and maintain a reliable connection to the internet throughout the duration of the visit. Please coordinate with your organization to ensure an IT specialist is available at the start of each day as well as throughout the visit.
      * If possible, send wireless login and password prior to arrival onsite.
      * If members of the IT team need to access individual reviewers’ computers in order to provide stable internet access, please coordinate with your Specialist in advance of the visit.
  + Technology
    - Please ensure outlets are accessible and provide extension cords for laptop plug-in.
    - Please have a printer in the workroom. The review team will need access to the printer throughout the duration of the visit.
    - Please ensure each focus group room is equipped with projection technology that can be used by the review team. If it is not possible for your SO to have a projector in each focus group room, please let the Specialist know.

### **Tips for a Successful Visit**

* + To the extent possible, ESE prefers that reviewers remain in the same space for a series of interviews/focus groups.
    - Given the use of polling technology, having to pack up and move this equipment (while possible) will require additional transition time.
    - If a focus group room is not being used for a focus group, but will be used later in the day, the Sponsoring Organization should plan to keep doors to focus group meeting rooms locked while technology is set up. A representative from the Sponsoring Organization should plan to unlock doors prior to the next focus group.
    - If possible, it is most conducive when ESE can arrive early to locate and set up each focus group room before the review team work day begins.
  + If your campus is particularly challenging to navigate, please provide support to reviewers as they transition from one location to another.
  + The Ed Prep contact should anticipate being ‘on-call’ (via cell phone) for the duration of the visit to handle questions that come up, prepare additional data/evidence that the review team may request, and help with logistics.

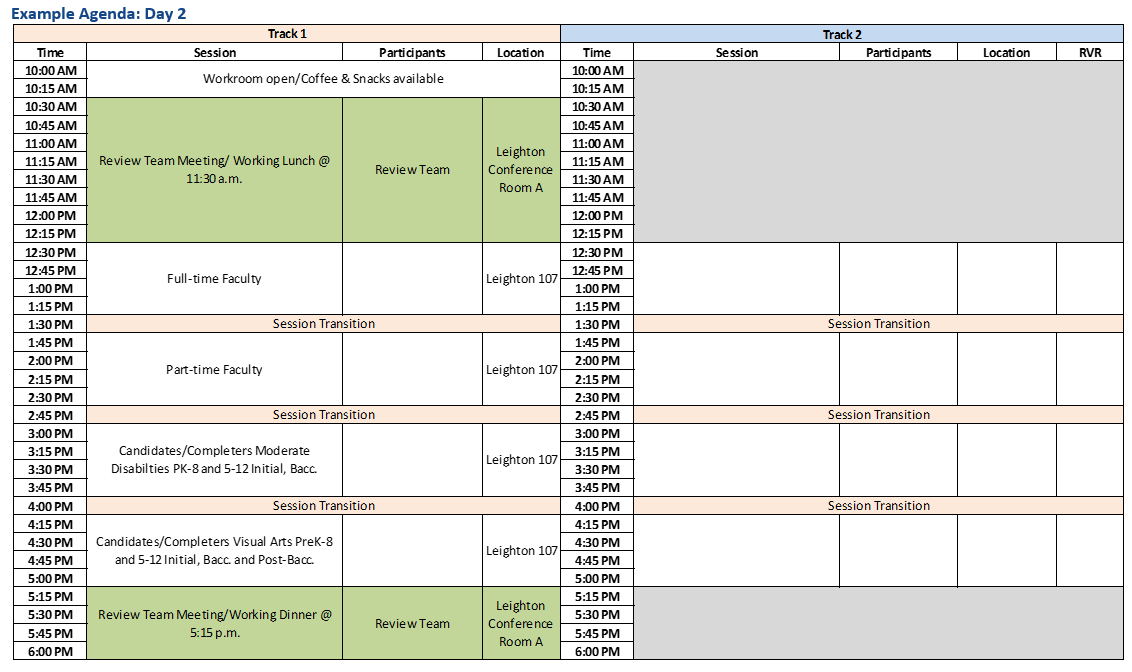
Checklist **of items to return to ESE by \_\_\_\_\_**

* Completed Formal Review Onsite Visit Schedule
* Campus/Building Maps
* Directions & Parking Information
* Course Schedule for days onsite
* Copies of Focus Group Solicitations/All-Call
* Interview and focus group participant lists for all except Candidates and Completers

### **ESE Review Random Sample**

| MEPID | Last Name, First Initial | Program | Completion Year |
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### Example Agenda: Day 1



### Example Agenda: Day 3