



Remote Monitoring and Oversight Plan 2021

New York State Education Department

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NYSED Charter School Office

Remote Monitoring and Oversight Plan

Liaisons' Alternative Monitoring Plan

2021 Remote Mid-Term and Check-In Site Visits

This remote monitoring and oversight plan is **ONLY** for **BoR-authorized** charter schools.

- Important memos can be found at <http://www.p12.nysed.gov/psc/aboutcharterschools/lawsandregs/law.html>.
- NYSED Digital Learning Resources: <http://www.nysed.gov/edtech/digital-learning-resources>
- NYSED Teaching in Remote/Hybrid Learning Environments Resources: <http://www.nysed.gov/rethink>
- Sharing Educational Effective Practices: <http://www.nysed.gov/curriculum-instruction/staying-connected-your-stories>

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This purpose of this document is to ensure transparency in authorizing practices during the 2020-2021 school year. The effects of the COVID-19 pandemic are still disrupting the implementation of educational plans throughout the state and country. All schools in New York State (NYS) were required to submit reopening plans to both the NYS Department of Health and the New York State Education Department (NYSED). Schools are now tasked with implementing these plans towards the aim of providing children across New York with a strong educational program in the face of adversity and uncertainty. The power of education to transform the lives of students and promote strong life outcomes remains undiminished. The monitoring and oversight activities enumerated in this document, as well as the templates and tools provided in the appendices, are designed to best outline NYSED's robust monitoring and oversight activities, as well as support schools towards the aforementioned goals even though schools may be implementing their educational program remotely, in-person, or through a hybrid of the two. NYSED's monitoring and oversight policies and procedures are also transparently posted on the NYSED Charter School Office (CSO) website at <http://www.p12.nysed.gov/psc/>. Should you or your school community have any questions, feel free to reach out to [your school's NYSED CSO liaison](#).

Week of 1/04-1/10

- **1/07/2021:** CSO Executive Director sent an email to the CharterSchools listserv regarding upcoming January, March, and May CSO Town Halls along with their tentative agendas. Please send any questions you would like addressed prior to the Town Hall to CharterSchools@nysed.gov. The link to participate in a Town Hall is: <https://zoom.us/j/99931827474?pwd=VkV5VjVjMDU3SmYwMXlEQnZkZFhuQT09>.

Week of 1/11-1/17

- **1/11/2021:** CSO Executive Director sent an email with a press release to the CharterSchools listserv regarding the Board of Regents electing Dr. Lester W. Young, Jr. s Chancellor.
- **1/11/2021:** NYSED P-12 emailed CharterSchools listserv regarding *Updated Guidance for School Administrators Regarding Limited Temporary Enforcement of Student Immunization Requirement from the New York State Department of Health*.
- **1/12/2021:** Rose M. LeRoy, Director of Educational Data and Research, NYSED emailed the CharterSchool listserv that today district and school leaders have access to embargoed Annual Graduation Data for their institution.
- **1/14/2021:** Rose M. LeRoy, Director of Educational Data and Research, NYSED emailed the CharterSchool listserv that today Total Cohort Graduation Rate Data were publicly available via the New York State Education Department's [Public Data Site](#). These data are available by selecting High School Graduation Rate in the School Data tab and the School Report Card in the School Data tab.

- **1/14/2021:** The CSO sent, from the CharterSchools mailbox to the CharterSchool listserv, information about the NYSED release of the 2016 Cohort HS Graduation Rates. For more specific data points and for school- and district-level graduation data, visit the Department's [public data site](#). A [PowerPoint presentation](#) with additional data is also available.
- **1/14/2021:** SD-CS-CFO@LISTSERV.NYSED.GOV > on behalf of CONAPPTA emailed the SD-CS-CFO@LISTSERV.NYSED.GOV announced a new monthly Office Hours Series to begin on Thursday, February 4, 2021. The full schedule of sessions and links to access these sessions is posted under the Training Opportunities tab: <http://www.nysed.gov/essa/schools/consolidated-application>. *If you have questions, please email conappta@nysed.gov.*

Week of 1/18-1/24

- **1/19/2021:** Rose M. LeRoy, Director of Educational Data and Research, NYSED emailed the CharterSchool listserv that the secure embargoed 2019-20 Group 2 State Report Card Release will be available later today *to authorized school and district personnel* via secure release on its public data site.
- **1/21/2021:** Response to COVID-19 Subgrant opportunity was announced for all applicable charter school education corporations. Allocations for eligible education corporations under this subgrant are based on final 2019-2020 BEDS total enrollment multiplied by \$150 per student, with a maximum allocation of \$49,950 per education corporation. Further details on subgrant requirements and the application can be found through the NYSED Charter School Office Portal at https://nysed-cso.smapply.io/prog/2021_csp_response_to_covid-19_grants/. The deadline to apply for funding under this subgrant is February 15, 2021. Please direct questions to CharterSchools@nysed.gov with "CSP Response to COVID-19 Grants" in the subject line.
- **1/21/2021:** Rose M. LeRoy, Director of Educational Data and Research, NYSED emailed the CharterSchool listserv that the public 2019-2020 Group 2 State Report Card Release will be available later today via its [public data site](#).
- **1/21/2021:** The CSO sent, from the CharterSchools mailbox to the CharterSchool listserv, information regarding NYSED's Rethink Grant and a request for education input on Professional Learning Opportunities through a brief reflection/survey at https://stonybrookuniversity.co1.qualtrics.com/jfe/form/SV_73aEYXqQIDr7n7f.

Week of 1/25-1/31

- **1/25/2021:** CSO Town Hall for BoR-authorized charter schools is being held from 3:00 PM to 4:30 PM today. The link to participate is: <https://zoom.us/j/99931827474?pwd=Vkv5VjVjMDU3SmYwMXlEQnZkZFhuQT09>.
- **1/25/2021:** The CSO sent, from the CharterSchools mailbox to the CharterSchool listserv, information about the *PROPOSED FEDERAL WAIVERS FOR STATE ASSESSMENTS AND*

ACCOUNTABILITY REQUIREMENTS. Comments on the draft waivers may be emailed to ESSAComments@nysed.gov with “ESSA Comments from (sender/organization name)” in the subject line. Comments will be accepted through February 5, 2021. In addition, stakeholders are encouraged to fill out a brief survey regarding the 2020-21 school year student assessment and school accountability processes. In February, NYSED will present a summary of the public comments received on the two draft waiver requests to the Board of Regents. If the waivers are approved by the USDE, the Department will propose to the Board of Regents that it adopt such amendments to Commissioner’s Regulations to implement the waivers.

Week of 2/01-2/07

- **2/04/2021:** CSO Executive Director sent an email to the CharterSchools listserv with a *REMINDER: 2021 CSP Response to COVID-19 Grants – Applications Due 2/15/2021*. The application link is https://nysed-cso.smapply.io/prog/2021_csp_response_to_covid-19_grants/. Any additional questions can be directed to CharterSchools@nysed.gov with “CSP Response to COVID-19 Grants” in the subject line.
- **2/04/2021:** The CSO sent, from the CharterSchools mailbox to the CharterSchool listserv, information about the *EDUCATION DEPARTMENT NOW ACCEPTING APPLICATIONS FOR 2021 SUMMER FOOD SERVICE PROGRAM SITES*: Open to Schools, Government Agencies, Nonprofit Groups, Faith-Based Organizations, Indian Tribal Territories, Migrant Programs and Camps. Potential new sponsors may [request a sponsor application](#) and obtain additional information on NYSED’s [SFSP website](#) or by contacting the New York State Education Department, Child Nutrition Program Administration, 89 Washington Avenue, Room 375 EBA, Albany, NY 12234, (518) 486-1086. Email is also available at cnsfsp@nysed.gov.

Week of 2/08-2/14

- **2/08/2021:** CSO Executive Director sent an email to the CharterSchools listserv regarding Commissioner Rosa Appointed First Latina Woman to Serve as Permanent Commissioner.
- **2/09/2021;** NYSED P-12 emailed CharterSchools listserv a memorandum regarding education funding under the Federal Coronavirus Response and Relief Supplemental Appropriations Act.
- **2/10/2021;** NYSED P-12 emailed CharterSchools listserv regarding NYSED-OCFS guidance document, associated [November 2020 webinar](#) and [presentation slides](#) provide recommendations on how educators and child welfare professionals can collaborate to address student attendance concerns in remote, in-person, or hybrid instructional settings that may potentially rise to the level of educational neglect.
- **2/10/2021;** CSO Executive Director sent an email to the BoR-Authorized Charter Schools regarding the CSO 2021 Teacher, Parent, and Student Surveys. The deadline to send the surveys out to all parents/guardians, teachers, and high-school students is Monday, February 15, 2021 and the deadline for each group of stakeholders to complete their surveys is Monday, March 15, 2021. Any questions can be sent to

CSOdata@nysed.gov with the subject line reading: Survey Question. Once the surveys have closed and been analyzed, an aggregate report of the responses for your school will be shared. These surveys are part of NYSED's commitment to community-based authorizing and the principles of equity and access for all students across New York State. Community-based authorizing is based on the principle that community stakeholder voice, and response to community need, is an integral component of charter school decision making at all levels. We hope to see evidence of community voice, as well as a commitment to the principles of diversity, equity, and inclusion, as part of the work happening throughout the portfolio of Board of Regents-authorized charter schools.

- **2/11/2021;** CSO Executive Director sent an email to the CharterSchools listserv regarding *Extended Deadline: 2021 CSP Response to COVID-19 Grants – Applications Now Due 3/01/2021*. The application link is https://nysed-cso.smapply.io/prog/2021_csp_response_to_covid-19_grants/. Any additional questions can be directed to CharterSchools@nysed.gov with "CSP Response to COVID-19 Grants" in the subject line.

Week of 2/15-2/21

- **Ongoing This Week:** Schools should continue to ensure that CSO 2021 Teacher, Parent, and Student Surveys sent out on 2/10/2021 are distributed and completed by the applicable stakeholder group. Surveys are due by Monday, March 15, 2021.
- **2/15/2021:** The deadline for BoR-authorized charter schools to send CSO 2021 Teacher, Parent, and Student Surveys out to all parents/guardians, teachers, and high-school students is today, Monday, February 15, 2021.
- **2/16/2021;** NYSED P-12 emailed CharterSchools listserv emailed a news release from NYSED Commissioner Rosa and Attorney General James. They issued [guidance to assist local education agencies](#) in their obligations to students experiencing homelessness to help ensure that these children are connected to education and other supports. For additional information about McKinney-Vento, the rights of students in temporary housing, and strategies that schools can implement to meet students' needs, please visit the State Education Department's [McKinney-Vento website](#) or the [NYS-TEACHS website](#).
- **2/17/2021:** NYSED P-12 emailed CharterSchools listserv an updated (amended) memo regarding in-person learning, COVID-19 testing and sports participation.
- **2/18/2021:** CSO Executive Director sent an email to the CharterSchools listserv regarding the *Teaching in Remote/Hybrid Learning Environments Update (TRLE)*. More information about the TRLE program is posted [online](#). There is still time to participate in [the reflection](#) and share your thoughts on the tools and skills most needed to facilitate remote/hybrid instruct and so we encourage you to complete and/or share the reflection with educators. The reflection remains open for teachers through March 15th. The link to complete the reflection is https://stonybrookuniversity.co1.qualtrics.com/jfe/form/SV_73aEYXqQIDr7n7f. A separate reflection for school administrators will be distributed in early March. You can keep up to date as these tools and resources are rolled out to the field by visiting the TRLE website at www.nysed.gov/trle.

- **2/18/2021:** The 2021 New School RFP will be finalized and posted at <http://www.p12.nysed.gov/psc/startcharter/StartCharter2021.html>. This RFP outlines NYSED's commitment to community-based authorizing and the principles of equity and access for all students across New York State. Community-based authorizing is based on the principle that community stakeholder voice, and response to community need, is an integral component of charter school decision making at all levels. We hope to see evidence of community voice, as well as a commitment to the principles of diversity, equity, and inclusion, throughout the applications received through this RFP as well as in the portfolio of the existing Board of Regents-authorized charter schools.

Week of 2/22-2/28

- **Ongoing This Week:** Schools should continue to ensure that CSO 2021 Teacher, Parent, and Student Surveys sent out on 2/10/2021 are distributed and completed by the applicable stakeholder group. Surveys are due by Monday, March 15, 2021.
- **2/23/2021:** CSO Executive Director sent an email to the CharterSchools listserv regarding a reminder, the 2021 CSP Response to COVID-19 Grant Application is due in less than a week, on March 1, 2021. To date, only 128 education corporations have yet to complete their applications (remember, you need to hit "submit" at the end of the application). There is still time to complete your application for these funds at https://nysed-cso.smapply.io/prog/2021_csp_response_to_covid-19_grants/. More information can be found below and any additional questions can be directed to CharterSchools@nysed.gov with "CSP Response to COVID-19 Grants" in the subject line.
- **2/25/2021:** CSO Executive Director sent an email to the BoR-Authorized Charter Schools regarding the CSO 2021 Teacher, Parent, and Student Surveys. The deadline to send the surveys out to all parents/guardians, teachers, and high-school students is Monday, February 15, 2021 and the deadline for each group of stakeholders to complete their surveys is Monday, March 15, 2021 (See additional details in 2/20/2021 entry.) Any questions can be sent to CSOdata@nysed.gov with the subject line reading: Survey Question. Once the surveys have closed and been analyzed, an aggregate report of the responses for your school will be shared.

Week of 3/01-3/07

- **Ongoing This Week:** Schools should continue to ensure that CSO 2021 Teacher, Parent, and Student Surveys sent out on 2/10/2021 are distributed and completed by the applicable stakeholder group. Surveys are due by Monday, March 15, 2021.
- **3/01/2021:** Response to COVID-19 Subgrant applications are due for all applicable charter school education corporations. Allocations for eligible education corporations under this subgrant are based on final 2019-2020 BEDS total enrollment multiplied by \$150 per student, with a maximum allocation of \$49,950 per education corporation. Further details on subgrant requirements and the application can be found through the NYSED Charter

School Office Portal at https://nysed-cso.smapply.io/prog/2021_csp_response_to_covid-19_grants/. Please direct questions to CharterSchools@nysed.gov with "CSP Response to COVID-19 Grants" in the subject line.

- **3/02/2021:** NYSED P-12 emailed CharterSchools listserv a memo regarding the Regents Exams required by USDE to be offered in June / August 2021.

Week of 3/08-3/14

- **3/09/2021:** NYSED P-12 emailed CharterSchools listserv regarding the Survey of Assessment Strategies. The New York State Education Department (NYSED) is seeking information from districts and charter schools about their local approaches to student assessment. The "Survey of Assessment Strategies" may be accessed in the SED Monitoring and Vendor Performance System. NYSED asks that you complete this survey as soon as possible but no later than close of business on Monday, March 15, 2021 so that data from your district/charter school can help inform our ongoing conversations with the USDE. If you have any questions, please contact us at emscassessinfo@nysed.gov
- **3/10/2021:** SD-CS-CFO@LISTSERV.NYSED.GOV on behalf of NYSEDP12 to SD-CS-CFO@LISTSERV.NYSED.GOV sent a memo regarding the use of biometric identifying technology such as facial recognition systems in New York State schools.
- **3/11/2021:** CSO Executive Director sent a reminder email to the CharterSchools listserv and the BoTBoR listserv regarding the March 16th NYSED authorizer Town Hall. The link is <https://zoom.us/j/99931827474?pwd=Vkv5VjVjMDU3SmYwMXIEQnZKZFhuQT09>.
- **3/12/2021:** NYSED P-12 emailed CharterSchools listserv a memo and related documents regarding SUNY's 'Big Dreams, Small Step' initiative to help high school students hardest hit by the pandemic apply to college this year.
- **Ongoing This Week:** Schools should continue to ensure that CSO 2021 Teacher, Parent, and Student Surveys sent out on 2/10/2021 are distributed and completed by the applicable stakeholder group. Surveys are due by Monday, March 15, 2021.

Week of 3/15-3/21

- **3/15/2021:** The CSO 2021 Teacher, Parent, and Student Surveys sent out on 2/10/2021 are due (see email sent to all BoR-authorized schools on 2/10/2021).
- **3/15/2021;** Complete the Survey of Assessment Strategies by close of business today. See details provided in the 3/09/2021 entry.
- **3/15/2021:** New York State Board of Regents Meeting, Albany, New York (webcast): <https://www.regents.nysed.gov/>.
- **3/16/2021:** NYSED P-12 emailed CharterSchools listserv and a memo regarding the administration of the Spring 2021 Grades 3-8 English Language Arts and Mathematics Tests. The information is also available on the [Department's web site](#). If you have questions, please contact the Office of State Assessment by e-mail at emscassessinfo@nysed.gov or by calling (518) 474-8220.

- **3/16/2021:** NYSED P-12 emailed CharterSchools listserv and a memo regarding the administration of the Spring 2021 New York State English as a Second Language Achievement Test (NYSESLAT). This memorandum contains information on the delivery and administration of this test, including important delivery dates.
- **3/16/2021:** CSO Town Hall for BoR-authorized charter schools is being held from 3:00 PM to 4:30 PM today. The link to participate is: <https://zoom.us/j/99931827474?pwd=Vkv5VjVjMDU3SmYwMXlEQnZKZFhuQT09>.
- **3/16/2021:** NYSED P-12 emailed CharterSchools listserv essential information concerning requesting and storing exam materials for the June 2021 Regents Examinations. The information is also available on the Department's website at <http://www.p12.nysed.gov/assessment/hsgen>. Questions regarding the school's exam request may be directed to examrequest@nysed.gov.
- **3/16/2021:** CSO Executive Director emailed the BoTBoR listserv regarding the PowerPoint presentation from today's Town Hall. The next Town Hall is scheduled for May 17 at 3:00 PM.
- **3/19/2021:** NYSED P-12 emailed CharterSchools listserv a memo and FAQ regarding Exemptions from Diploma Requirements and Cancellation of the August 2021 Regents Exams.

Week of 3/22-3/28

- **Beginning this week**, and continuing through June 2021, the NYSED CSO liaisons will conduct remote check-in site visits. Reference Appendix E of this document: *2021 Remote Check-In SV Checklist for Liaisons* regarding school preparation for these remote SVs and what to expect during them.
- **3/25/2021:** The CSO, in conjunction with the NYC Charter School Center, presents a Zoom conversation from 3:00 PM to 4:30 PM to the BoR-authorized charter school leaders and BoT chairs, that are eligible to submit a renewal application in the summer of 2021.

Week of 3/29-4/04

- **Ongoing** through June 2021, the NYSED CSO liaisons will conduct remote check-in site visits. Reference Appendix E of this document: *2021 Remote Check-In SV Checklist for Liaisons* regarding school preparation for these remote SVs and what to expect during them.
- **3/31/2021:** NYSED P-12 emailed CharterSchools listserv a memo providing guidance on the impact of the revised Regents Examination schedule on hourly instructional requirements and 180 session day requirements.
- **3/31/2021:** From its online portal, CSO staff emailed BoR-authorized charter schools that will be receiving spring of 2021 mid-term site visits, a reminder to begin to upload the required documents. As indicated in the email, regardless of the date of your site visit, we request that you begin to upload the required documents, as outlined in the *Schools*

Uploading Documents to the CSO Portal section (page 7) of the Mid-term Site Visit Protocol, now through the deadline of April 9th.

- **4/01/2021:** NYSED P-12 emailed CharterSchools listserv a statement from the Board of Regents' Chancellor Young and Commissioner Rosa regarding the recent acts of violence in New York State and across the nation. They indicated that as state's education officials, the Chancellor and Commissioner strongly urge all educators to help students understand the harm caused by racism and bigotry.
- **4/02/2021:** CSO Executive Director emailed the BoTBoR listserv regarding the NYSED CSO soliciting public comment on its Local Assessment Plan Memo. Details and more information on the local assessment plan policy can be found in the draft memo [here](#). All comments are due back to NYSED no later than Monday, April 12, 2021 after which comments will be considered, a final memo will be published, and Board of Regents-authorized schools will be notified. Comments should be sent to NYSED via email at CharterSchools@nysed.gov with the subject line "Local Assessment Plan Comments."

Week of 4/05-4/11

- **Ongoing** through June 2021, the NYSED CSO liaisons will conduct remote check-in site visits. Reference Appendix E of this document: *2021 Remote Check-In SV Checklist for Liaisons* regarding school preparation for these remote SVs and what to expect during them.
- **4/05/2021:** NYSED P-12 emailed CharterSchools listserv a memo regarding information about Federal American Rescue Plan Act (ARPA) funding.
- **4/09/2021:** Due date for BoR-authorized charter schools receiving spring of 2021 mid-term site visits to upload the required documents, as outlined in the *Schools Uploading Documents to the CSO Portal* section (page 7) of the Mid-term Site Visit Protocol.

Week of 4/12-4/18

- **Ongoing** through June 2021, the NYSED CSO liaisons will conduct remote check-in site visits. Reference Appendix E of this document: *2021 Remote Check-In SV Checklist for Liaisons* regarding school preparation for these remote SVs and what to expect during them.
- **Beginning this week**, and continuing through June 2021, the NYSED CSO SV team will conduct its 16 remote mid-term site visits. Reference Appendix D of this document: *2021 Remote MT SV Checklist for Liaisons* regarding school preparation for these remote SVs and what to expect during them.
- **4/12/2021:** Rose M. LeRoy, Director of Educational Data and Research, NYSED emailed the CharterSchool listserv that the 2020 Enrollment Report and the 2020 English Language Learner (ELL) Data Report is publicly available on <https://data.nysed.gov/>. If you have questions about data contained in the Student Information Repository System (SIRS) or data verification, please contact your Regional Information Center or Big 5 city school

district data coordinator or the Office of Information and Reporting Services by using the help link on the bottom of our public data site at: <https://data.nysed.gov/>. New York City Charter Schools should visit <https://charterschools.mojohelpdesk.com> and submit a ticket.

- **4/12/2021:** The CSO sent, from the CharterSchools mailbox to the CharterSchool listserv, information regarding the New York State Board of Regents launching an initiative to advance diversity, equity, and inclusion in New York schools. As the first step in the initiative, the Board released a draft framework and call to action for all schools in New York State to develop policies that advance diversity, equity and inclusion as a priority in their schools. The full text of the Board's [Framework for Diversity, Equity and Inclusion in New York Schools](#) is available on the Department's website.
- **4/12/2021:** New York State Board of Regents Meeting, Albany, New York (webcast): <https://www.regents.nysed.gov/>.
- **4/12/2021:** Public comment regarding the proposed NYSED Local Assessment Plan, emailed to all Board of Regents-authorized charter schools are due today. The draft Local Assessment Plan Memo can be found on the NYSED website at http://www.p12.nysed.gov/psc/documents/BoRAuthorizedCharterSchoolLocalAssessmentReportingMemo_DRAFT.pdf.
- **4/13/2021:** NYSED P-12 emailed CharterSchools listserv a memo regarding Providing Over-Age Students the Opportunity to Return to School in the 2021-22 School Year Due to the COVID-19 Pandemic.
- **4/14/2021:** NYSED P-12 emailed CharterSchools listserv a memo and timeline regarding the Implementation Extension of the NYS Next Generation Learning Standards in English Language Arts and Mathematics and NYS P-12 Science Learning Standards.
- **4/14/2021:** NYSED P-12 emailed CharterSchools listserv guidance on supporting student mental health over the remaining months of the school year.

Week of 4/19-4/25

- **Ongoing** through June 2021, the NYSED CSO liaisons will conduct remote check-in site visits. Reference Appendix E of this document: *2021 Remote Check-In SV Checklist for Liaisons* regarding school preparation for these remote SVs and what to expect during them.
- **Ongoing** through June 2021, the NYSED CSO SV team will conduct its 16 remote mid-term site visits. Reference Appendix D of this document: *2021 Remote MT SV Checklist for Liaisons* regarding school preparation for these remote SVs and what to expect during them.
- **4/19/2021:** NYSED P-12 emailed CharterSchools listserv a memo regarding the submission of revised school reopening plans.
- **4/19/2020:** In its April newsletter, the NYSED's CSO posted the following link to the final Local Assessment Plan memo: http://www.p12.nysed.gov/psc/aboutcharterschools/lawsandregs/documents/BoRAuthorizedCharterSchoolLocalAssessmentReportingMemoApril2020_FINAL.pdf
- **4/22/2021:** Rose M. LeRoy, Director of Educational Data and Research, NYSED emailed the CharterSchool listserv that secure embargoed Group 3 2019-20 NYS Report Card

Release is available to authorized school and district personnel via secure release on our <https://data.nysed.gov/>. The public release is scheduled for Monday, April 26, 2021. School and district data are embargoed until the public release. Data under embargo may not be discussed at public meetings or otherwise released to the public.

- **4/23/2021:** NYSED P-12 emailed CharterSchools listserv a memo requesting public comment on the inclusion of Regents Examination exemptions when calculating Performance Indices (PI) as required by the New York State approved Every Student Succeeds Act (ESSA) accountability plan.

Week of 4/26-5/02

- **Ongoing** through June 2021, the NYSED CSO liaisons will conduct remote check-in site visits. Reference Appendix E of this document: *2021 Remote Check-In SV Checklist for Liaisons* regarding school preparation for these remote SVs and what to expect during them.
- **Ongoing** through June 2021, the NYSED CSO SV team will conduct its 16 remote mid-term site visits. Reference Appendix D of this document: *2021 Remote MT SV Checklist for Liaisons* regarding school preparation for these remote SVs and what to expect during them.
- **4/26/2021:** Rose M. LeRoy, Director of Educational Data and Research, NYSED emailed the CharterSchool listserv that the 2019 NYS Report Card Group 3 Public Release of CRDC and Expenditure Per Pupil Data are available today on its [public data site](#). If you have questions about data contained in the Student Information Repository System (SIRS) or data verification, please contact your Regional Information Center or Big 5 city school district data coordinator. If you have *specific questions regarding the reporting of Inexperienced Teachers and Principals or Teachers Teaching Out of Certification*, please contact the Office of Information and Reporting Services by the help link at the bottom of this [public data site](#). *All NYC Charter Schools that participate in NYS testing*, If you have any further questions, please visit the [NYCDOE charter school help desk](#) and submit a ticket.
- **4/26/2021:** NYSED P-12 emailed CharterSchools listserv details about the availability of expanded professional learning opportunities for New York's educators to effectively implement remote and hybrid learning. A calendar of TRLE learning opportunities can be found on the [Department's TRLE website](#). More information on professional development courses offered by NYSCATE can be found on [the Department's website](#) or on the [NYSCATE website](#).
- **4/28/2021:** From its CharterSchools mailbox, the CSO emailed to the CharterSchool listserv information regarding this effort: *U.S. Department of Education Launches Best Practices Clearinghouse to Highlight Innovative Practices for Reopening Schools and Campuses*.

Week of 5/03-5/09

- **Ongoing** through June 2021, the NYSED CSO liaisons will conduct remote check-in site visits. Reference Appendix E of this document: *2021 Remote Check-In SV Checklist for Liaisons* regarding school preparation for these remote SVs and what to expect during them.
- **Ongoing** through June 2021, the NYSED CSO SV team will conduct its 16 remote mid-term site visits. Reference Appendix D of this document: *2021 Remote MT SV Checklist for Liaisons* regarding school preparation for these remote SVs and what to expect during them.
- **5/03/2021:** Letter of Intent to Apply for new charter school RFP for applicant groups seeking charters through the Board of Regents: <http://www.p12.nysed.gov/psc/startcharter/StartCharter2021.html>.
- **5/04/2021:** NYSED P-12 emailed CharterSchools listserv a memo and Excel documents regarding local educational agency (LEA) allocations of Coronavirus Response and Relief Supplemental Appropriations Act, 2021 (CRRSA Act) and the American Rescue Plan (ARP) Act funding. Funding amounts for each school district are in those attached excel documents.
- **5/05/2021:** NYSED P-12 emailed CharterSchools listserv the 2021 New York State Education Department Summer School Handbook. The Handbook has been updated this year to include requirements for in-person and remote programs. It also includes an introduction and recommendations and resources regarding promising practices for summer learning programs.

Week of 5/10-5/16

- **Ongoing** through June 2021, the NYSED CSO liaisons will conduct remote check-in site visits. Reference Appendix E of this document: *2021 Remote Check-In SV Checklist for Liaisons* regarding school preparation for these remote SVs and what to expect during them.
- **Ongoing** through June 2021, the NYSED CSO SV team will conduct its 16 remote mid-term site visits. Reference Appendix D of this document: *2021 Remote MT SV Checklist for Liaisons* regarding school preparation for these remote SVs and what to expect during them.
- **5/10/2021:** New York State Board of Regents Meeting, Albany, New York (webcast): <https://www.regents.nysed.gov/>.
- **5/10/2021:** From its CharterSchools mailbox, the CSO emailed to the CharterSchool listserv a memo announcing the opening of the application process for LEA CRRSA (CARES 2) funding.
- **5/10/2021:** From its CharterSchools mailbox, the CSO emailed to the CharterSchool listserv that the Board of Regents today acted on measures to advance diversity, equity and inclusion in schools across the New York State and promote civic education opportunities, as announced by State Education Commissioner Betty A. Rosa. The Board, building on its [Framework on Diversity, Equity and Inclusion in New York's Schools](#),

released its [Diversity, Equity and Inclusion Policy Statement](#) which will promote and support efforts at the State and local level to strengthen Diversity, Equity and Inclusion (DEI) policies and practices. Additionally, the Department acted to create the New York State Seal of Civic Readiness and proposed the Civic Readiness Pathway to graduation.

- **5/12/2021:** NYSED P-12 emailed CharterSchools listserv a memo that the Department is extending through the 2021-22 school year the pilot to enable school districts to pivot to remote instruction on what would otherwise be a day of school closure due to weather and non-weather emergencies in the 2021-22 school year.
- **5/12/2021:** From its CharterSchools mailbox, the CSO emailed to the CharterSchool listserv a memo providing information on the application process for LEA allocations of ARP-ESSER funding.
- **5/12/2021:** NYSED P-12 emailed CharterSchools listserv a memo about a new resource from the U.S. Departments of Education and Justice: [Confronting COVID-19-Related Harassment in Schools](#) - a fact sheet for students and families. This resource is one part of their work to counter racism and ensure equity and equal opportunity for all.

Week of 5/17-5/23

- **Ongoing** through June 2021, the NYSED CSO liaisons will conduct remote check-in site visits. Reference Appendix E of this document: *2021 Remote Check-In SV Checklist for Liaisons* regarding school preparation for these remote SVs and what to expect during them.
- **Ongoing** through June 2021, the NYSED CSO SV team will conduct its 16 remote mid-term site visits. Reference Appendix D of this document: *2021 Remote MT SV Checklist for Liaisons* regarding school preparation for these remote SVs and what to expect during them.
- **5/17/2021:** CSO Town Hall for BoR-authorized charter schools is being held from 3:00 PM to 4:30 PM today. The link to participate is: <https://zoom.us/j/99931827474?pwd=Vkv5VjVjMDU3SmYwMXlEQnZkZFhuQT09>.

Week of 5/24-5/30

- **Ongoing** through June 2021, the NYSED CSO liaisons will conduct remote check-in site visits. Reference Appendix E of this document: *2021 Remote Check-In SV Checklist for Liaisons* regarding school preparation for these remote SVs and what to expect during them.
- **Ongoing** through June 2021, the NYSED CSO SV team will conduct its 16 remote mid-term site visits. Reference Appendix D of this document: *2021 Remote MT SV Checklist for Liaisons* regarding school preparation for these remote SVs and what to expect during them.

Week of 5/31-6/06

- **Ongoing** through June 2021, the NYSED CSO liaisons will conduct remote check-in site visits. Reference Appendix E of this document: *2021 Remote Check-In SV Checklist for Liaisons* regarding school preparation for these remote SVs and what to expect during them.
- **Ongoing** through June 2021, the NYSED CSO SV team will conduct its 16 remote mid-term site visits. Reference Appendix D of this document: *2021 Remote MT SV Checklist for Liaisons* regarding school preparation for these remote SVs and what to expect during them.

Week of 6/07-6/13

- **Ongoing** through June 2021, the NYSED CSO liaisons will conduct remote check-in site visits. Reference Appendix E of this document: *2021 Remote Check-In SV Checklist for Liaisons* regarding school preparation for these remote SVs and what to expect during them.
- **Ongoing** through June 2021, the NYSED CSO SV team will conduct its 16 remote mid-term site visits. Reference Appendix D of this document: *2021 Remote MT SV Checklist for Liaisons* regarding school preparation for these remote SVs and what to expect during them.
- **6/07/2021:** New York State Board of Regents Meeting, Albany, New York (webcast): <https://www.regents.nysed.gov/>

Week of 6/14-6/20

- **Ongoing** through June 2021, the NYSED CSO liaisons will conduct remote check-in site visits. Reference Appendix E of this document: *2021 Remote Check-In SV Checklist for Liaisons* regarding school preparation for these remote SVs and what to expect during them.
- **Ongoing** through June 2021, the NYSED CSO SV team will conduct its 16 remote mid-term site visits. Reference Appendix D of this document: *2021 Remote MT SV Checklist for Liaisons* regarding school preparation for these remote SVs and what to expect during them.

Week of 6/21-6/27

Scheduling Remote Site Visits

Use:

- **Face-to-face** contact with schools is required. Ask your schools if they can set up a video conference using the platform of their choice. If there is no other alternative, schedule a phone call, or other conferencing call such as Google Hangouts, or Microsoft Teams;
- Include appropriate staff for each type of remote site visit (BoT chair/school leader minimally for check-ins);
- Include time for discussion with the school leader who will be accompanying a CSO team member on the remote classroom observation. As per Appendix C (Classroom Observation Worksheet), you will speak with the school leader before and after the observation.
- If you were going to participate in a BoT meeting, you can join their video conferences; and
- Access remote classroom learning in lieu of onsite observations.
 - Ask if you can be a silent participant in one of the school's remote learning sessions, or request that schools provide you with links to any pre-recorded instructional content they are using during this time.
 - Just as we do for on-site classroom observations, use **Appendix C** (Classroom Observation Worksheet) as a lens by which you should provide feedback to the school. In consultation with NYSED CSO Counsel, there are no privacy issues with having access to these observations. As liaisons do during onsite classroom observations, they should ask the school leader to have a member of the leadership team accompany them **during** these observations to understand the context of the lesson and to respond to the pre- and post- observation questions placed on **Appendix C**.

Remote Site Visits

Please see **Appendices D and E**.

- Tailor conversations based on the schools' needs.
- The liaison reviews the most recent CSO SV report/memo and identifies the most pressing areas to be discussed.
- Reference all steps outlined in the *Liaison Remote Check-In SV Checklist* or the *Liaison Remote Mid-Term SV Checklist*.

- Although it is not an accountability measure, liaisons can ask schools to provide local internal assessment data that they are using to assess student progress during the implementation of the school's 2020-2021 school year.

Appendix A: Sample Guiding Questions for Conversations with Schools

Supporting Schools & Their Families

1. How are you and your families doing given the current crisis?
2. How did you ensure that students had access to the internet or computers?
3. Have you had any families that have not been able to participate in the alternative instruction being offered at your school?
4. What has been the response from parents? From students? From teachers?
5. How have you been handling your lottery and enrollment issues?

Board of Trustees and Other Staff

1. How does your school maintain 1-on-1 communication with staff and students?
2. How is your school handling the mental health of your staff?
3. How do you include other, non-instruction staff, such as your finance, operations, and support teams? What is their role?
4. How have you been keeping in contact with the school's Board of Trustees during the crisis?
5. How is school management staying in contact with the school's board of trustees during the COVID-19 crisis?
6. Describe the school's board governance during the COVID-19 crisis?

Student Assessment

1. How is your school measuring the social-emotional wellbeing of students?
2. What internal assessments is your school using now to measure academic progress while implementing your educational reopening plan?
3. How do you ensure academic rigor during the crisis?
4. How are you evaluating student work during the implementation of your school's reopening plan?
5. What expectations do you have for achievement rates by spring? For next academic year?
6. Beyond state assessments, what in what other ways is your school measuring academic achievement and growth?
7. What will the school's March – June 2020 report cards look like?
8. What do the school's plans to administer end-of-year assessments look like?

Special Populations (SwD, ELL, ED)

1. How do you differentiate instruction, and provide supports, for SwDs and ELL students in your school's reopening plan?
2. How is your school supporting students living in temporary housing, homeless shelters, court-involved youth, or over-age/under-credited students (specially as these students may have challenges access remote instruction)?
3. How have you collaborated with your district and CSE?

4. How is your school ensuring that IEPs and 504s are being implemented?
5. What internal assessments will your school use when students return in order to determine student progress towards academic standards?

Changes in Instructional Modalities

1. How is your school ensuring that procedures set forth in the reopening plan are being followed?
2. What conversations has the schools' management and board had regarding the school's potential return to your brick and mortar building?
3. What are your expectations for students to return to school?
4. How will you monitor re-enrollment rates?
5. How will you ensure the social-emotional well-being of students upon their return?
6. What academic interventions will you put into place upon students return?
7. Do you plan to change your curriculum in any way?
8. Do you plan on any calendar changes to address any potential loss of learning while school was out of session?
9. How do you plan to celebrate the matriculation of your students in terminal grades if you are, or are not, back before the end of the academic year?
10. What would you put into place now to prepare for a similar disruption of learning in the future?
11. How can you monitor the spread of COVID-19?
12. How do we instill parent confidence?
13. How do we reinforce student safety?
14. When, and how, will extra-curricular activities reopen?
15. Do protocols for special student populations change?
16. What steps need to be taken to ensure mental health?
17. Would any alternative academic calendars work?
18. Do you have any plans for summer school? If so, please describe.
19. How will you work with parents to instill confidence in the return to the school building?
20. How do protocols need to change for special populations?
21. What organizations can your school partner with as you return to your school buildings?
22. How will you align the school's budget to help support any additional or supplemental activities that result from the questions above?
23. Can you give us a broad overview of what your school is doing regarding a reopening plan?
24. How did you create the plan? Did you use any exemplars or resources?
25. What steps did you take before the current crisis to ensure the strong implementation of the reopening plan?
26. What were the logistics of starting the plan?
27. What equipment or supplies did you need to distribute to your staff and students?
28. What curriculum/platform is your school using to provide remote instruction?
 - How did the school choose this curriculum/platform?
 - Is it working for your schools? How do you know?
 - How are you adapting your school's curriculum to deliver it remotely?

29. What have been some lessons learned regarding the implementation of your school's plan?
30. What would you have done differently?
31. How could you continue the practices learned during this crisis once it is over?
32. In case your school commences in-person instruction and the school is suddenly directed to cease such instruction and commence fully remote instruction does your school have an instructional and communication plan in place for students, teachers, and community members?
33. What professional development is your school providing to instructional students around remote instruction pedagogy?

Community Authorizing

1. How does your school define community?
2. How is community voice including in the running of your school at all levels including for your board of trustees?
3. How does your school collaborate with Community Based Organizations?
4. What is your board's relationship with the community you serve?
5. How does your school's board of trustees represent and exemplify the ideals of diversity, equity, and inclusion?
6. How does your school's staff represent and exemplify the ideals of diversity, equity, and inclusion?
7. How does your school's culture support the ideals of diversity, equity, and inclusion?

Appendix B: Recommendations for Collecting Data During Distance Learning¹

Schools across the state have prioritized the needs of students during this time by meeting both their basic needs and pivoting to the implementation of reopening plans as quickly as possible. Now that distance learning has been implemented, the NYSED Charter School Office encourages school leaders to think about how to assess student progress with the intent of helping to drive instructional decision making during the implementation of reopening plans as well as preparing for the return to brick and mortar instruction.

Collecting meaningful data can assist schools in:

1. Developing academic interventions for students in need;
2. Improve the efficacy of reopening plans, especially if any component of it needs to continue into the 2020 -2021 school year;
3. Preparation for accountability measures that may be enacted when the pandemic is over. Schools should not be surprised if asked from a variety of stakeholders to quantify student learning or engagement during the pandemic; and
4. Being able to articulate the outcomes and challenges of this quarter with data will be important in renewal processes for several years, especially in lieu of 2020 state testing.

Below are guiding questions and examples of data that could be beneficial to collect. This is not a checklist but is intended to support school planning. It is important that school leaders make effective decisions for their context, program, and needs.

¹ Thank you to the California Charter Schools Association for sharing the resources they created which is the genesis of the materials presented in this appendix.

Student Engagement and Participation

Guiding questions	Sample approach
<ul style="list-style-type: none"> • If asked to do so, would you be able to report attendance data for this quarter? How are you defining it and tracking it? • How are you defining engagement? What percent of students are fully, somewhat, or not engaged? 	<ul style="list-style-type: none"> • Collecting data on how often students are logging in for class meetings, office hours, and/or programs (e.g. many online programs have analytics that can aid in this tracking) • Collecting attendance at the start of the class or via chat boxes on live interfaces • Tracking participation in meetings (answers, questions asked, polls answered, academic comments in chat boxes) • Collecting data on the amount of completed work as attendance

Student Work Completion and Comprehension

Guiding questions	Sample approach
<ul style="list-style-type: none"> • How are you tracking whether students are completing assignments? Are you looking at all the assigned work or just some? • Are you collecting and tracking all assigned work or is the work meant as practice and you are collecting performance data? • Are you tracking time spent on online programs or just written assignments? 	<ul style="list-style-type: none"> • Scoring and tracking all student work on a 1-4 scale for completion • Scoring and tracking 1-2 assignments per day, teachers choose most important piece of work to score and give feedback on, feedback notes collected in spreadsheet • If assigned work is only for practice, teachers tracking only scores on exit tickets to show mastery (if student isn't mastering, then teachers look at student work) • Checking and tracking time spent on online programs and improved levels (e.g. Achieve 3000 time spent engaged and improved Lexile levels)

Student Growth and Achievement

Guiding questions	Sample approach
<ul style="list-style-type: none"> • Will you still be able to give any of your end of year assessments (e.g. NWEA Map Spring administration)? • Will you give alternate end of year assessments (e.g. an SBAC Interim Assessment Block on a key standard)? • Does your school have, or can they purchase, online assessments systems that provide achievement data, but are simpler than the assessments you normally give? • Are there any 1:1 assessments that could still be given via your school's learning management platform or phone call? • Are there critical learning targets that your school is prioritizing? Certain standards? • Is there a new skill set that you are teaching your students unexpectedly that you may be able to track results for? • Can you show the change in overall grades from your closure date to the end of the year through your SIS? 	<ul style="list-style-type: none"> • Working closely with families to create a testing environment at home and utilize NWEA or similar assessments before the end of the year • Working with support staff or families to assess foundational skills via 1:1 inventory assessments on your school's learning management platform • Conducting a timed writing or performance task on zoom to assess a target standard determined by the school • Even if testing conditions are not perfect, the data gathered may be useful for teachers and parents

Wellness and Family Engagement

Guiding questions	Sample approach
<ul style="list-style-type: none"> • How are you tracking student and family well-being during this crisis? • How often are you communicating with students and families? • How many students and families are receiving essential services like food? • Which students and families are 	<ul style="list-style-type: none"> • Giving frequent student and family surveys that capture their level of access to your Distance Learning offering and/or their experience of it • Tracking all outreach to families and whether contact was made • Using communication logs shared across all staff working with students

<p>being offered and are using additional supports like mental health services?</p>	<p>and families</p>
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Postsecondary Outcomes

Guiding questions	Sample approach
<ul style="list-style-type: none"> How are you tracking the impact of this pandemic on outcomes for students graduating high school? Are students changing their plans for next year? Do you know why? 	<ul style="list-style-type: none"> School counselors logging student post- secondary plans and use survey, polls, and individual phone calls to track changes in these decisions at regular intervals. Ideally, this data is tracked periodically into next school year (e.g. June/July and again in August/September)

Sample Guidelines for Assessments

Guiding questions	Sample approach
<p>Big picture</p> <ul style="list-style-type: none"> How will you quantify the educational impact of COVID-19 on your school community? Can you articulate the extent of progress or slide during the last quarter of school? Are there ways to compare the achievement at your school compared to schools you will be compared to? <p>Fall 2020 diagnostics</p> <ul style="list-style-type: none"> What was the last formal assessment given prior to the pandemic? What does that assessment tell you about where students might be in the fall? 	<ul style="list-style-type: none"> Partner with NYSED regarding surveying schools and parents Giving norm-referenced diagnostic in the first weeks of school, or over the summer, in addition to fall administration Giving 1:1 reading assessments or looking at drops in Lexile or similar score Articulating clear intervention goals for 2020 Quarter/Trimester 1 and track outcomes Getting results as early as possible so you have time to plan and adjust over the summer Utilizing NWEA’s Similar Students Report (by request to NWEA) or

<ul style="list-style-type: none">• Can you compare 2020 diagnostics with previous years?• Will the assessment used to diagnose slide also be given Spring 2021 to capture growth in the 2020-2021 school year?	another similar comparative report
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Appendix C: NYSED CSO Remote Site Visit Classroom Observation Evidence Worksheet

School name:	Date:	CSO team observer name:		
Class title/subject area:	Grade:	Was a school rep observing with you?	School rep name:	School rep title:
Type of class: <input type="checkbox"/> Gen ED <input type="checkbox"/> ICT <input type="checkbox"/> SETTS/Resource Room <input type="checkbox"/> Stand-alone ENL <input type="checkbox"/> Pull-out/break-out room <input type="checkbox"/> Dual language <input type="checkbox"/> Other				
# of adults in the classroom:	Role(s): <input type="checkbox"/> Teacher <input type="checkbox"/> Lead teacher <input type="checkbox"/> Co-teacher(s) <input type="checkbox"/> Teaching Asst. <input type="checkbox"/> SPED teacher <input type="checkbox"/> ENL Teacher <input type="checkbox"/> Other (Social Emotional Staff):			
Total number of students:	Duration of observation (minutes):	Technical difficulties experienced or observed?		
Do the minutes/hours of instruction provided in this class align to the class information provided in the charter? <input type="checkbox"/> Yes <input type="checkbox"/> No				
How many minutes/hours of daily instruction are provided in this class? _____				

PRE-OBSERVATION (with school administrator):

Question to school staff member viewing with observer: **What should we expect to see in this classroom in terms of staffing, instruction, content, key design elements, differentiation, student engagement (if a student is not on camera, how is engagement measured), and other norms for students and teachers while they are in this class?**

DURING OBSERVATION:

LEARNING ENVIRONMENT

Metric	2 = observed, 1 = partially observed, 0 = not observed			Notes (If Needed)
A. Lesson organization and preparation evident (i.e. lesson plans available, posted agenda or objectives, prepared materials, or other)	2	1	0	
B. Students demonstrate awareness of class and online rules, procedures, and expectations	2	1	0	
C. Students are remote learning ready (e.g. available for check-in; dressed as expected by the school; on time; and have the tools necessary to engage in classwork)	2	1	0	
D. Online learning appears well-managed by the teacher	2	1	0	

INSTRUCTION

Metric	2 = observed, 1 = partially observed, 0 = not observed	Notes (If Needed)
E. Effectively communicates objective(s) to students	2 1 0	
F. Assessment tools used to check for student understanding	<input type="checkbox"/> questions <input type="checkbox"/> observations <input type="checkbox"/> classwork <input type="checkbox"/> rubrics <input type="checkbox"/> homework <input type="checkbox"/> exit tickets <input type="checkbox"/> polls <input type="checkbox"/> peer review <input type="checkbox"/> individual conferences <input type="checkbox"/> quizzes or tests <input type="checkbox"/> Other:	
G. Differentiates lesson to meet needs of all students	2 1 0	
H. Provides feedback to students	2 1 0	
I. Students are engaged, as defined by the school, and are participating in learning activities	2 1 0	
J. Class time is maximized for learning	2 1 0	

POST OBSERVATION (with school administrator):

Question to school staff member viewing with observer **Was the observed instruction aligned with the school’s instructional model and key design elements? What feedback would you give the teacher based on what was just observed?**

COMMENTS:

Appendix D: 2021 Remote Mid-Term Site Visit Checklist for Liaisons

PURPOSE OF REMOTE MID-TERM SITE VISIT

Pursuant to the [Board of Regents' Oversight Plan](#), described in the school's charter agreement and the [CSO Monitoring Plan](#), for a Board of Regents-authorized charter school, the CSO uses the mid-term site visit as an opportunity to provide the school with an informative and comprehensive report and formative feedback detailing how the school is progressing toward meeting the standards set forth in the [Charter School Performance Framework](#). After the site visit, the CSO will provide the school with an informative and comprehensive report and formative feedback detailing how the school is progressing toward meeting the 2015 or the 2019 Performance Framework benchmarks.

In addition, NYSED, on behalf of the New York State Board of Regents, is a community-based authorizer committed to principles of equity and access for all students across New York State. Community-based authorizing is based on the principle that community stakeholder voice, and response to community need, is an integral component of charter school decision making at all levels. During the mid-term site visit, look for evidence of community voice, as well as a commitment to the principles of diversity, equity, and inclusion, in the school's policies and practices. For example, does the school:

1. Define the community being served (community is more than just the students, staff, and families the school serves)? Community usually includes all the people and groups who are affected by school activities and outcomes, who have influence or power over the school's direction, or have an interest in its successful or unsuccessful outcomes;
2. Ensure that the perspectives, input, and "voice" of that community are authentically solicited and included in school-level decision making, including on the school's board of trustees; and
3. Implement a design, policies, and practices that, both academically and social-emotionally, support the needs of, and are responsive to, the community. This should be a dynamic and ongoing, not static, process.

All information gathered through site visits, whether full site or check-in, will be compiled into a school's record of performance and used to inform renewal decisions at the end of a school's charter term.

BEFORE THE REMOTE MID-TERM SITE VISIT (Using the online portal, where applicable):

1. ___ Reference the BoR MSVL for MT SV designation.
2. ___ With CSO leadership, select a consultant.
3. ___ To complete all applicable tasks, review the MT SV Protocol, beginning with the *Planning and Scheduling the Remote Mid-Term Site Visit*.
 - a. ___ Remind school leadership to begin their applicable tasks on the MT SV Protocol.
 - b. ___ Schedule the SV date with the school leader and all CSO SV team members.
Note: Consider the school's academic achievement, unresolved issues and concerns when determining length of visit, the number of individuals on team, and the focus groups needed. (Schools with a history of strong academic achievement and compliance will generally require a shorter visit with fewer team members.)
 - c. ___ Place the SV date on the BoR MSVL Spring 2021 Mid-Term SV tab.
 - d. ___ Finalize SV schedule and remote classroom observation schedule with school leader.
 - e. ___ Send SV Confirmation Letter and to school leader/BoT chair.
4. ___ Participate in the CSO Consultant Webinar.
**Work with SV team members to adhere to Webinar timeline.*
5. ___ CSO staff uploads documents to the portal as per the MT SV Table of Contents.
6. ___ CSO SV team members begin to review the school's documents, including those uploaded to the portal.
7. ___ Complete sections of the MT SV report template and forward to consultants.
**Reference the BoR MSVL Spring 2021 MT tab for 2015 or 2019 PF alignment.*
8. ___ Conduct SV pre-visit team time with SV team members.
**Discuss the preliminary draft report, focus group questions, classroom observations, focus groups, remote learning details, logistics, etc.).*
**Finalize SV plans.*

DURING THE REMOTE MID-TERM SITE VISIT:

1. ___ Conduct the SV.
2. ___ Consultant collects completed Classroom Observation Worksheets and SV team member notes.
3. ___ Conduct a SV team meeting to discuss BM ratings and draft MT SV report.
4. ___ If applicable, conduct a brief closing meeting with school staff.
5. ___ Remind the consultant to email you the final draft report within two weeks of the SV.

AFTER THE REMOTE MID-TERM SITE VISIT (Using the online portal, where applicable):

1. ___ If necessary, work with CSO leadership to schedule a call with the school leader/BoT chair.
2. ___ Review with the consultant all next steps, as per the Consultant Webinar timeline.

3. ___ Follow CSO internal review/approval process.
4. ___ Email the school leader/BoT chair the final draft report for factual corrections. The school has one week to respond, or it is considered a final report.
5. ___ Review factual corrections and updates and finalizes the report following the CSO internal process. Send the final report to the school leader/BoT chair for evaluative comments. The school has one week to provide evaluative comments.
6. ___ Along with the final report, the liaison emails the 2015 PF or the 2019 PF action plan template to the school leader/BoT chair to complete/return within three weeks.
7. ___ Efile the evaluative comments in the school's MT SV efolder.
8. ___ Check the status of the MT SV report on the 2020-2021 Memo and Report Master Tracker.

Appendix E: 2021 Remote Check-In Site Visit Checklist for Liaisons

PURPOSE OF REMOTE CHECK-IN SITE VISIT

Pursuant to the **CSO Monitoring Plan**, remote check-in site visits will provide a means for CSO staff to meet with schools and ensure the school is progressing toward meeting Performance Framework benchmarks. Check-in site visits typically occur in years 1, 2, and 4 of a school's five-year charter term, or at the discretion of CSO for schools in shorter charter terms; and will result in a letter or summary memo to the school. Baseline check-in site visits are conducted during year 1 of the school's operation to focus on challenges and progress made toward implementing the school's charter and its alignment to the Performance Framework benchmarks.

In addition, NYSED, on behalf of the New York State Board of Regents, is a community-based authorizer committed to principles of equity and access for all students across New York State. Community-based authorizing is based on the principle that community stakeholder voice, and response to community need, is an integral component of charter school decision making at all levels. During the check-in visit, look for evidence of community voice, as well as a commitment to the principles of diversity, equity, and inclusion, in the school's policies and practices. For example, does the school:

1. Define the community being served (community is more than just the students, staff, and families the school serves)? Community usually includes all the people and groups who are affected by school activities and outcomes, who have influence or power over the school's direction, or have an interest in its successful or unsuccessful outcomes;
2. Ensure that the perspectives, input, and "voice" of that community are authentically solicited and included in school-level decision making, including on the school's board of trustees; and

3. Implement a design, policies, and practices that, both academically and social-emotionally, support the needs of, and are responsive to, the community. This should be a dynamic and ongoing, not static, process.

All information gathered through site visits, whether full site or check-in, will be compiled into a school's record of performance and used to inform renewal decisions at the end of a school's charter term.

BEFORE THE REMOTE CHECK-IN SITE VISIT (Using the online portal, where applicable):

1. ___Reference the BoR Master SV List to confirm your school's designation as either a regular check-in or baseline check-in (for schools in YR 1 of operation).
2. ___Confirm whether your school is under the 2015 or the 2019 Performance Framework.
3. ___Contact each school to schedule a mutually convenient date and time (approximately mid-Feb - early June) for the remote site visit (or phone call if approved).
4. ___Place the date on the internal CSO BoR Master SV list.
5. ___Send a *SV Confirmation letter* to the BoT chair/school leader, noting logistics and requesting documents.
6. ___Review all data for the school, particularly Attachment 1, Attachment 2, and all parent/teacher/student surveys.
7. ___Following a review of school documents, create an agenda (focus groups? Conversations? Classroom Observations?).
 - a. ___ If possible, the CSO liaison should remotely meet with the school's board of trustees, or at least the board chair to discuss the CSO standards and the applicable Performance Framework. Liaisons may also decide to attend a BoT meeting.
8. ___If a school is receiving a remote baseline check-in SV, the liaison sets up the school for success by focusing on the challenges and progress made toward implementing the school's charter and meeting the applicable Performance Framework benchmarks. While this is a supportive SV, the liaison discusses the the school's compliance with its charter and reminds the school leader/BoT of the CSO accountability standards, particularly for BM 1 and 9. Examples of areas of discussion include: Is the school implementing its key design elements? How is the school evaluating the effectiveness of its strategies and adjusting them accordingly? Is the school fully staffed? Is the school familiar with its Performance Framework benchmarks? Except for extenuating circumstances, schools in their initial charter term are discouraged from submitting material revision requests.
9. ___The liaison efiles all SV documents in the school's *Monitoring: 2021 Check-In SV* efolder.

DURING THE REMOTE CHECK-IN SITE VISIT

Liaisons have the flexibility to differentiate and tailor the SV accordingly. They decide what to benchmarks and topics to discuss, and, if classroom observations and/or focus groups are needed (such as: school's action plan, notices, issues tracker, most recent SV report, surveys, complaints, revision requests, ATT 1 academic/enrollment data, and ATT 2 fiscal data). Examples may include:

- ___BM 1: Do the school leaders believe they are meeting academic performance expectations? Why or why not? If not, what interventions is the school offering to address academic deficiencies?
 - ___Grades 3-8: How are their students performing in ELA and math compared to the district of location? Compared to the state average? What trends are they seeing? What is subgroup performance looking like? What are they doing to improve performance? How are they evaluating the efficacy of their strategies?
 - ___High School: How are they assessing student progress over time? How do they know whether students are on track for graduation?
- ___BM 2: What info do teacher surveys provide? How is the use of data informing instructional strategies?
- ___BM 3: What info do parent/teacher/student surveys provide? Is the school implementing its social-emotional aspects, incorporating mental health areas, implementing its DASA requirement?
- ___BM 4/ BM 5: Are there fiscal issues based on ATT 2 fiscal dashboard? Does the school have any CAPs due to OAS, OSC audits?
- ___BM 6: Are there any outstanding BoT member applications under review? Is the BoT implementing its strategic plan? Does the BoT have any questions about CSO documents, standards, Performance Framework, SEDREF, etc.?
- ___BM 7: Is the organizational chart being implemented the CSO approved one? Is the school fully staffed? Is school staff working with any partners, and measuring the efficacy of those partners?
- ___BM 8: Is there evidence of the school implementing its KDEs? Is the mission the same as the CSO approved version and what is posted on the CSO website?
- ___BM 9: Discuss school enrollment. Is the school meeting its planned total enrollment in accordance with its growth plan? Is it over-enrolled? Is it within the 85% threshold? Is the subgroup enrollment similar to that of the district of location? If not, what are the school's efforts toward increasing subgroup enrollment and retention? Is the school measuring the efficacy of these strategies? Discuss BM 9 data on ATT 1.
- ___BM 10: Discuss questions or concerns you have about the school's legal compliance, such as board compliance with OML, GML, or best practice in resolving parent complaints. Is the school implementing its CAPs based on its Notices of Deficiency, or addressing its Notices of Concern? Are there fingerprint clearance issues? Teacher certification issues? Did the school meet its renewal conditions? Does the school have a pattern of parent complaints? Does the school's program match its KDEs? Does the number of BoT members and makeup align to the school's by-laws? Does the school accurately state the revisions that were approved during the charter term?

___Thank the school leader for the remote site visit and discuss the next steps regarding a memo, and possible call with Barbara/David if significant issues were uncovered during the SV.

AFTER THE REMOTE SITE VISIT (Using the online portal, where applicable):

1. ___Within approximately two to six weeks of the SV, draft a check-in memo to the BoT chair and school leader. The memo is succinct, evidence-based, and summarizes the SV

with a focus on key areas of strengths, concerns, and recommended next steps (Reference [Sample Memos](#));

2. ___After you draft the memo, email it to Barbara for review and approval, consulting David if there are major issues.
3. ___Email and efile the PDF draft memo to the school leader and BoT chair for factual corrections (one week). Reference the sample school outreach email.
4. ___Upon receipt of factual corrections, finalize the memo, efile it, and email the PDF memo back to the school leader and BoT chair for an opportunity to provide evaluative comments (one week). Reference the sample school outreach email.
5. ___Upon receipt of the evaluative comments, efile it with the SV memo.
6. ___If there are concerns about the school, schedule a follow-up call with the school leader, BoT chair, and Barbara/David to address significant concerns.
7. ___Check the status of your SV memo on the 2020-2021 Memo and Report Tracker.