



# New York State Education Department

## ***Renewal Site Visit Report 2017-2018***

**Great Oaks Charter School**

**Visit Date: October 17, 2017  
Date of Report: August 6, 2018**

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## SCHOOL DESCRIPTION

### Charter School Summary<sup>1</sup>

<b>Name of Charter School</b>	Great Oaks Charter School
<b>Board Chair</b>	Susan Mustokoff Akselrad
<b>District of Location</b>	NYC CSD #1
<b>Opening Date</b>	08/26/2013
<b>Charter Terms</b>	Initial Charter Term: 07/1/2013 to 06/30/2018
<b>Authorized Grades/Maximum Authorized Enrollment</b>	Grades 6-10/433
<b>Management Company</b>	Great Oaks Foundation
<b>Educational Partners</b>	N/A
<b>Facilities</b>	38 Delancey Street, New York, NY 10002
<b>Mission Statement</b>	Great Oaks Charter School will prepare our students to succeed in college by obtaining a four-year degree. We will accomplish this by combining high academic and behavioral expectations for our students with an extraordinary level of individual attention to each student's needs through tutoring.
<b>Key Design Elements</b>	<ul style="list-style-type: none"> <li>• School culture of high academic and behavioral expectations</li> <li>• Focus on building relationships with students and their families</li> <li>• Highly individualized academic program through daily tutoring delivered through the Tutor Corps</li> <li>• Small school environment</li> <li>• College-preparatory instruction</li> <li>• More time on task – longer school day/school year and Saturday programming</li> <li>• Data-driven instructional practices</li> <li>• Focus on English language learners</li> </ul>
<b>Requested Revisions</b>	No material revisions requested.

### Renewal Outcomes

The following renewal outcomes are possible:

- **Full-Term Renewal:** A school's charter may be renewed for the maximum term of five years. For a school to be eligible for a full-term renewal, during the current charter term the school must have compiled a strong and compelling record of meeting or exceeding Benchmark 1, and at the time of the renewal analysis, have met substantially all other performance benchmarks in the Framework.

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<sup>1</sup> The information in this section was provided by the NYS Education Department Charter School Office.

- Short-Term Renewal:** A school’s charter may be renewed for a shorter term, typically of three years. As discussed above, the Regents will place an even greater emphasis on student performance for schools applying for their second or subsequent renewal, which is consistent with the greater time that a school has been in operation and the corresponding increase in the quantity and quality of student achievement data that the school has generated. In order for a school to be eligible for short-term renewal, a school must either:
  - (a) have compiled a mixed or limited record of meeting Benchmark 1, but at the time of the renewal analysis, have met substantially all of the other performance benchmarks in the Framework which will likely result in the school’s being able to meet Benchmark 1 with the additional time that short-term renewal permits, **or**
  - (b) have compiled an overall record of meeting Benchmark 1, but falls far below meeting one or more of the other performance benchmarks in the Framework.
- Non-Renewal:** A school’s charter will not be renewed if the school does not apply for renewal or the school fails to meet the criteria for either full-term or short-term renewal. In the case of non-renewal, a school’s charter will be terminated upon its expiration and the school will be required to comply with the Charter School Office’s Closing Procedures to ensure an orderly closure by the end of the school year.

**Please Note:** The Regents may include additional terms, conditions, and/or requirements in a school’s Full-Term or Short-Term Renewal charter to address specific situations or areas of concern. For example, a school may meet the standards for full-term renewal or short-term renewal with regard to its educational success, but may be required to address organizational deficiencies that need to be corrected but do not prevent the Regents from making the required legal findings for renewal. A school may also meet the standards for full-term renewal or short-term renewal of only a portion of its educational program (e.g., for the elementary school program, but not the middle school program). Such additional terms and/or requirements may include, but are not limited to, restrictions on the number of students and grades to be served by the school, additional student performance metrics, heightened reporting requirements, or specific corrective action.

### School Characteristics

#### Approved Enrollment for the Current Charter Term

	Year 1 2013 to 2014	Year 2 2014 to 2015	Year 3 2015 to 2016	Year 4 2016 to 2017	Year 5 2017 to 2018
<b>Grade Configuration</b>	Grade 6	Grades 6-7	Grades 6-8	Grades 6-8	Grades 6-8
<b>Total Approved Enrollment</b>	99	198	297	297	297

### Proposed Enrollment for the Renewal Charter Term

	<b>Year 1 2018 to 2019</b>	<b>Year 2 2019 to 2020</b>	<b>Year 3 2020 to 2021</b>	<b>Year 4 2021 to 2022</b>
<b>Grade Configuration</b>	Grades 6 - 9	Grades 6 - 10	Grades 6 - 11	Grades 6 - 12
<b>Total Approved Enrollment</b>	365	433	492	550

## METHODOLOGY

A one-day renewal site visit was conducted at Great Oaks Charter School on October 17, 2017. The CSO team conducted interviews with the board of trustees, school leadership team, and parents. In cooperation with school leadership, the NYSED Charter School Office (CSO) administered an anonymous online survey to teachers.

The team conducted 13 classroom observations in Grades 6 to 8. The observations were approximately 20 minutes in length and conducted jointly with the Executive Director and the Principal.

The documents and data reviewed by the team before, during, and after the site visit included the following:

- **Renewal Application**
- **Academic data**
- **Renewal Site Visit Workbook**
- **Current organizational chart**
- **A master school schedule**
- **Map of school with room numbers and teacher names**
- **Board materials (roster and minutes)**
- **Board self-evaluation processes and documents**
- **Student/family handbook**
- **Staff handbook and personnel policies**
- **A list of major assessments**
- **Teacher and administrator evaluation processes**
- **Interventions offered at the school**
- **School-conducted surveys of teachers and NYC DOE surveys**
- **Professional development plans and schedules**
- **Efforts towards achieving enrollment and retention targets**
- **School submitted Annual Reports**

## BENCHMARK ANALYSIS

The Performance Framework, which is part of the oversight plan included in the Charter Agreement for each school, outlines 10 Performance Framework benchmarks in three key areas of charter school performance:

- Educational Success
- Organizational Soundness
- Faithfulness to Charter and Law

Observational findings from the review of the renewal application, supporting data, and the site visit will be presented in alignment with the [Performance Framework](#) Benchmarks and Indicators according to the rating scale below, although not all indicators will necessarily be assessed on every site visit. A brief summary of the school's strengths will precede the benchmark analysis. Each benchmark will be rated; however, the report narrative will highlight those indicators not fully met by the school.

Level	Description
<b>Exceeds</b>	The school meets the performance benchmark; potential exemplar in this area.
<b>Meets</b>	The school generally meets the performance benchmark; few concerns are noted.
<b>Approaches</b>	The school does not meet the performance benchmark; a number of concerns are noted.
<b>Falls Far Below</b>	The school falls far below the performance benchmark; significant concerns are noted.

For the site visit conducted on October 17, 2017 at Great Oaks Charter School, see the following Performance Framework benchmark scores and discussion.

**New York State Education Department  
Charter School Performance Framework Rating**

Performance Benchmark		Level
<b>Educational Success</b>	<b>Benchmark 1: Student Performance:</b> The school has met or exceeded achievement indicators for academic trends toward proficiency, proficiency and high school graduation. At all grade levels and all assessments, scoring proficiently means achieving a performance level of 3 or higher (high school Regents and Common Core Regents exam score of 65 or higher).	<b>Approaches</b>
	<b>Benchmark 2: Teaching and Learning:</b> School leaders have systems in place designed to cultivate shared accountability and high expectations and that lead to students’ well-being, improved academic outcomes, and educational success. The school has rigorous and coherent curriculum and assessments that are aligned to the New York State Learning Standards (NYSLS) for all students. Teachers engage in strategic practices and decision-making in order to address the gap between what students know and need to learn so that all students experience consistent high levels of engagement, thinking and achievement.	<b>Meets</b>
	<b>Benchmark 3: Culture, Climate, and Family Engagement:</b> The school has systems in place to support students’ social and emotional health and to provide for a safe and respectful learning environment. Families, community members and school staff work together to share in the responsibility for student academic progress and social-emotional growth and well-being. Families and students are satisfied with the school’s academics and the overall leadership and management of the school.	<b>Meets</b>
<b>Organizational Soundness</b>	<b>Benchmark 4: Financial Condition:</b> The school is in sound and stable financial condition as evidenced by performance on key financial indicators.	<b>Meets</b>
	<b>Benchmark 5: Financial Management:</b> The school operates in a fiscally sound manner with realistic budgets pursuant to a long-range financial plan, appropriate internal controls and procedures, and in accordance with state law and generally accepted accounting practices.	<b>Meets</b>
	<b>Benchmark 6: Board Oversight and Governance:</b> The board of trustees provides competent stewardship and oversight of the school while maintaining policies, establishing performance goals, and implementing systems to ensure academic success, organizational viability, board effectiveness and faithfulness to the terms of its charter.	<b>Meets</b>
	<b>Benchmark 7: Organizational Capacity:</b> The school has established a well-functioning organizational structure, clearly delineated roles for staff, management, and board members. The school has systems and protocols that allow for the successful implementation, evaluation, and improvement of its academic program and operations.	<b>Meets</b>
<b>Faithfulness to Charter &amp; Law</b>	<b>Benchmark 8: Mission and Key Design Elements:</b> The school is faithful to its mission and has implemented the key design elements included in its charter.	<b>Meets</b>
	<b>Benchmark 9: Enrollment, Recruitment, and Retention:</b> The school is meeting or making annual progress toward meeting the enrollment plan outlined in its charter and its enrollment and retention targets for students with disabilities, English language learners, and students who are eligible applicants for the free and reduced priced lunch program; or has demonstrated that it has made extensive good faith efforts to attract, recruit, and retain such students.	<b>Meets</b>
	<b>Benchmark 10: Legal Compliance:</b> The school complies with applicable laws, regulations, and the provisions of its charter.	<b>Meets</b>

### ***Summary of Findings***

The CSO renewal site visit team found that Great Oak Charter School's ("Great Oaks") performance generally meets almost all of the Benchmarks of the Performance Framework for the current charter term. While the school's overall academic performance falls below the community school district (CSD) of location and state averages, across subjects in the at-risk subgroups, Great Oaks academic performance for English language learners is above the state proficiency in both ELA and math. Students with disabilities and economically disadvantaged students are also exceeding the state proficiency in math.

Curriculum content is reported by school leadership to be strategic and aligned to the NYSLS. According to school leaders, systems are in place to define and reinforce a school culture based on high expectations and college readiness. The board provides oversight and is the financial steward of the school. The school has stabilized its leadership structure over the course of its charter term. The school maintains a welcoming environment and multiple venues for family communication and engagement. Teachers are recruited, professionally developed, and evaluated. The school meets enrollment and retention targets and exhibits good faith efforts to attract, recruit, and retain English Language Learners and educationally disadvantaged students, enrolling comparable percentages to its district of location. The school has an established management agreement with the Great Oaks Foundation, which is evaluated on an annual basis. The school appears compliant with most laws, regulations, and provisions of its charter.

Please see additional summative evidence for each Benchmark of the Performance Framework below.

## **Benchmark 1: Student Performance**

*The school has met or exceeded achievement indicators for academic trends toward proficiency, proficiency and high school graduation. At all grade levels and all assessments, scoring proficiently means achieving a performance level of 3 or higher (high school Regents and Common Core Regents exam score of 65 or higher).*

### **Finding: Approaches**

#### **Summative Evidence for Benchmark 1:**

##### Indicator 1: All Schools

###### *1.a.i. Accountability - ESEA Accountability Designation:*

Great Oaks ESEA Accountability Designation was in Good Standing for the 2014-2015, 2015-2016, 2016-2017 school years.

###### *1.b.i. Similar Schools Comparison – Comparative Proficiency:*

Great Oaks reported on the comparison to its Similar Schools, as determined by the NYSED Charter Schools Office (CSO). In the renewal application, the school reported that in 2016-2017, Great Oaks had higher proficiency in math than its Similar Schools group of 72 schools, with 30% of students' proficient compared to 22% proficient for the Similar Schools group. Great Oaks was comparable to its Similar Schools group in ELA with 28% proficiency compared to 30% proficiency. In 2015-2016, Great Oaks outperformed its Similar Schools group of 74 schools by 8 percentage points in ELA and 17 percentage points in math.

##### Indicator 2: Middle School Outcomes

###### *2.a.i. Trending Toward Proficiency – Aggregate Standards-Based Trend Toward Proficiency:*

According to New York State Education Department (NYSED) data, Great Oaks percent of students maintaining a proficient testing level or trending toward proficiency from one year's test administration to the next in ELA increased by 35 percentage points from 25% in the 2014-2015 school year to 60% in the 2015-2016 school year. However, the percent of students proficient in ELA declined by 9 percentage points, from 60% in the 2015-2016 school year to 51% in the 2016-2017 school year. In math, Great Oaks percent of students maintaining a proficient testing level or trending toward proficiency has declined year over year. In the 2014-2015 school year, 52% of students maintained proficiency or increased one or more levels from year 1 to year 2 in math. In the 2015-2016 school year that percentage fell to 38%, and to 35% in the 2016-2017 school year.

###### *2.a.ii. Trending Toward Proficiency - Subgroup Standards-Based Trend Toward Proficiency:*

According to NYSED data, after a decline from 2014-2015 to the 2015-2016 school year, all three of Great Oaks subgroups trended positively towards proficiency in math from 2015-2016 to the 2016-2017 school year, with the students with disabilities subgroup experiencing the largest growth from 17% trending towards proficiency in 2015-2016 to 29% in 2016-2017. In ELA, all three subgroups went from trending positively in ELA from 2014-2015 to the 2015-2016 school year, to then declining from 2015-2016 to the 2016-2017 school year. However, the slight decline that occurred was only a couple of

percentage points, keeping all three subgroups as having an overall positive trend from the 2014-2015 school year to the 2016-2017 school year, with the students with disabilities subgroup experiencing the largest growth from 0% trending towards proficiency in 2014-2015 to 40% in 2016-2017.

*2.b.i. Proficiency - Aggregate School Level Proficiency for All Students: See Table 1 below.*

Great Oaks served grades 6 and 7 in the 2014-2015 school year, and grew to its full middle school grade span of grades 6 through 8 in the 2015-2016 school year. Great Oaks was originally located in Community School District (CSD) 2 in the 2013-2014 and 2014-2015 school years, but due to space constraints, moved to a facility located in CSD 1 before the 2015-2016 school year. Therefore in the tables below, the CSD of comparison for the 2014-2015 school year is CSD 2, while the CSD of comparison for 2015-2016 and 2016-2017 school years is CSD 1.

According to the New York City Department of Education (NYC DOE) 2016-2017 School Quality Snapshot, 95% of Great Oaks former 8<sup>th</sup> graders earned enough high school credit in 9<sup>th</sup> grade to be on track for graduation, outperforming both the city with 90% and the district of location with 89%.

Table 1: Middle School Assessment Proficiency Outcomes for All Students: School, District & NYS Level Aggregates

All Students	ELA					Math				
	GO-NYC	NYC CSD of Location	Variance to NYC CSD of Location	NYS	Variance to NYS	GO-NYC	NYC CSD of Location	Variance to NYC CSD of Location	NYS	Variance to NYS
2014-2015	<b>17%</b>	59%	<b>-42</b>	31%	<b>-14</b>	<b>46%</b>	62%	<b>-16</b>	33%	<b>+13</b>
2015-2016	<b>29%</b>	41%	<b>-12</b>	37%	<b>-8</b>	<b>30%</b>	36%	<b>-6</b>	34%	<b>-4</b>
2016-2017	<b>28%</b>	46%	<b>-18</b>	40%	<b>-12</b>	<b>30%</b>	38%	<b>-8</b>	34%	<b>-4</b>

\* 2014-2015 was in CSD 2; 2015-2016 and 2016-2017 were in CSD 1

\*\* State and District data are grade specific. Grades 6-7 for 2014-2015 and Grades 6-8 for 2015-2016 and 2016-2017.

2.b.ii. Proficiency – Subgroup School Level Proficiency: See Tables 2-4 below.

Table 2: Middle School Assessment Proficiency Outcomes by Subgroup – Students with Disabilities: *School, District & NYS Level Aggregates*

Students with Disabilities	ELA					Math				
	GO-NYC	NYC CSD	Variance to NYC CSD	NYS	Variance to NYS	GO-NYC	NYC CSD	Variance to NYC CSD	NYS	Variance to NYS
2014-2015	<b>2%</b>	22%	<b>-20</b>	5%	<b>-3</b>	<b>14%</b>	24%	<b>-10</b>	7%	7
2015-2016	<b>9%</b>	8%	1	7%	<b>-2</b>	<b>11%</b>	8%	3	8%	3
2016-2017	<b>11%</b>	12%	<b>-1</b>	9%	2	<b>11%</b>	8%	3	8%	3

\* 2014-2015 was in CSD 2; 2015-2016 and 2016-2017 were in CSD 1

\*\* State and District data are grade specific. Grades 6-7 for 2014-2015 and Grades 6-8 for 2015-2016 and 2016-2017.

Table 3: Middle School Assessment Proficiency Outcomes by Subgroup – English Language Learners: *School, District & NYS Level Aggregates*

English Language Learners	ELA					Math				
	GO-NYC	NYC CSD	Variance to NYC CSD	NYS	Variance to NYS	GO-NYC	NYC CSD	Variance to NYC CSD	NYS	Variance to NYS
2014-2015	<b>1%</b>	11%	<b>-10</b>	2%	<b>-1</b>	<b>53%</b>	43%	<b>+10</b>	9%	<b>+44</b>
2015-2016	<b>11%</b>	8%	<b>+3</b>	2%	<b>+9</b>	<b>17%</b>	29%	<b>-12</b>	13%	<b>+4</b>
2016-2017	<b>16%</b>	6%	<b>+10</b>	9%	<b>+7</b>	<b>17%</b>	14%	<b>+3</b>	12%	<b>+5</b>

\* 2014-2015 was in CSD 2; 2015-2016 and 2016-2017 were in CSD 1

\*\* State and District data are grade specific. Grades 6-7 for 2014-2015 and Grades 6-8 for 2015-2016 and 2016-2017.

Table 4: Middle School Assessment Proficiency Outcomes by Subgroup – Economically Disadvantaged Students: *School, District & NYS Level Aggregates*

Economically Disadvantaged	ELA					Math				
	GO-NYC	NYC CSD	Variance to NYC CSD	NYS	Variance to NYS	GO-NYC	NYC CSD	Variance to NYC CSD	NYS	Variance to NYS
2014-2015	<b>14%</b>	26%	<b>-5</b>	20%	<b>-6</b>	<b>48%</b>	29%	<b>+19</b>	25%	<b>+23</b>
2015-2016	<b>30%</b>	32%	<b>-2</b>	26%	<b>+4</b>	<b>32%</b>	28%	<b>+4</b>	24%	<b>+8</b>
2016-2017	<b>28%</b>	34%	<b>-6</b>	30%	<b>-2</b>	<b>33%</b>	27%	<b>+6</b>	24%	<b>+9</b>

\* 2014-2015 was in CSD 2; 2015-2016 and 2016-2017 were in CSD 1

\*\* State and District data are grade specific. Grades 6-7 for 2014-2015 and Grades 6-8 for 2015-2016 and 2016-2017.

2.b.iii. Proficiency – Grade Level Proficiency: See Table 5 and 6 below.

Table 5: Grade Level Proficiency for All Students: 2014-2015

2014-2015	ELA					Math				
	GO-NYC	NYC CSD #2	Variance to NYC CSD #2	NYS	Variance to NYS	GO-NYC	NYC CSD #2	Variance to NYC CSD #2	NYS	Variance to NYS
Grade 6	<b>14%</b>	57%	<b>-43</b>	31%	<b>-17</b>	<b>37%</b>	67%	<b>-30</b>	39%	<b>-2</b>
Grade 7	<b>22%</b>	58%	<b>-36</b>	29%	<b>-7</b>	<b>56%</b>	65%	<b>-9</b>	35%	<b>+21</b>

\*\* State and District data are grade specific.

Table 6: Grade Level Proficiency for All Students: 2015-2016

2015-2016	ELA					Math				
	GO-NYC	NYC CSD #1	Variance to NYC CSD #1	NYS	Variance to NYS	GO-NYC	NYC CSD #1	Variance to NYC CSD #1	NYS	Variance to NYS
Grade 6	<b>12%</b>	41%	-29	33%	-22	<b>17%</b>	46%	-29	40%	-23
Grade 7	<b>20%</b>	42%	-22	35%	-15	<b>36%</b>	36%	0	36%	0
Grade 8	<b>50%</b>	41%	+9	41%	+9	<b>31%</b>	23%	+8	24%	+7

\*\* State and District data are grade specific.

Table 7: Grade Level Proficiency for All Students: 2016-2017

2016-2017	ELA					Math				
	GO-NYC	NYC CSD #1	Variance to NYC CSD #1	NYS	Variance to NYS	GO-NYC	NYC CSD #1	Variance to NYC CSD #1	NYS	Variance to NYS
Grade 6	<b>13%</b>	40%	-27	32%	-19	<b>34%</b>	47%	-13	40%	-6
Grade 7	<b>22%</b>	50%	-28	42%	-20	<b>24%</b>	42%	-18	38%	-14
Grade 8	<b>44%</b>	48%	-4	45%	-1	<b>31%</b>	20%	+11	22%	+9

\*\* State and District data are grade specific.

During the 2016-17 school year, the school administered the Regents Common Core Algebra I exam to 28 students. At-risk students being served in GOCS far outperformed or matched the state average in terms of Regents exam pass rates. Additional data is included in Table 3. GOCS's focus on English-language learner instruction had significant benefits for this at-risk group.

Table 8: Regents Common Core Algebra I Proficiency SY 2016-2017

Number of students tested	Student Subgroup	Percentage of students proficient	NYS Proficiency	Variance
28	All students	68%	74%	-6
3	Students with disabilities	67%	45%	+22
2	English Language Learners	100%	46%	+54
21	Economically disadvantaged	67%	67%	0

## Benchmark 2: Teaching and Learning

*School leaders have systems in place designed to cultivate shared accountability and high expectations and that lead to students' well-being, improved academic outcomes, and educational success. The school has rigorous and coherent curriculum and assessments that are aligned to the New York State Learning Standards (NYSLs) for all students. Teachers engage in strategic practices and decision-making in order to address the gap between what students know and need to learn so that all students experience consistent high levels of engagement, thinking and achievement.*

### Finding: Meets

<u>Element</u>	<u>Indicators</u>
1. <i>Curriculum</i>	<ul style="list-style-type: none"> <li>a. The school has a documented curriculum that is aligned to the NYSLs.</li> <li>b. Teachers use unit and lesson plans that introduce complex materials, stimulate higher order thinking, and build deep conceptual understanding and knowledge around specific content.</li> <li>c. The curriculum is aligned horizontally across classrooms at the same grade level and vertically between grades.</li> <li>d. The curriculum is differentiated to provide opportunities for all students to master grade-level skills and concepts.</li> </ul>
2. <i>Instruction</i>	<ul style="list-style-type: none"> <li>a. The school staff has a common understanding of high-quality instruction, and observed instructional practices align to this understanding.</li> <li>b. Instructional delivery fosters engagement with all students.</li> </ul>
3. <i>Assessment and Program Evaluation</i>	<ul style="list-style-type: none"> <li>a. The school uses a balanced system of formative, diagnostic and summative assessments.</li> <li>b. The school uses qualitative and quantitative data to inform instruction and improve student outcomes.</li> <li>c. The school uses qualitative and quantitative data to evaluate the quality and effectiveness of the academic program, and modifies the program accordingly.</li> </ul>
4. <i>Supports for Diverse Learners</i>	<ul style="list-style-type: none"> <li>a. The school provides supports to meet the academic needs for all students, including but not limited to: students with disabilities, English language learners, and economically disadvantaged students.</li> <li>b. The school has systems to monitor the progress of individual students and facilitate communication between interventionists and classroom teachers regarding the needs of individual students.</li> </ul>

### Summative Evidence for Benchmark 2:

#### Curriculum

During the site visit, the school leadership reported that starting in the 2016-2017 school year Great Oaks began using Eureka Math for the math curriculum and Expeditionary Learning for ELA curriculum, both of which are aligned to the New York State standards. For science and social studies, teachers create unit and lesson plans, aligned to the New York City Department of Education scope and sequences. The school reported that they align curriculum horizontally and vertically during content team meetings, through giving feedback on unit and lesson plans and identifying trends across grades.

Instructional leaders review lesson plans and give feedback to content teachers and with support from special education teachers modify to ensure differentiation in the lessons. Lesson plans were made available to CSO during classroom observations that included stated objectives, do-now prompts, independent practice, checks for understanding, and timed breakdowns of the segments of the lesson. The school reported that unit planning feedback happens quarterly.

### Instruction

The instructional leadership team has been working with teachers and tutors to bring a more focused connection to classroom instruction and tutoring sessions. The school reports that it uses instructional strategies that engage all students in rigorous instruction with an inquiry focus and gradual release model. The school reported that they are working towards a decreased amount of teacher-led instruction and an increased amount of student talk. One of the ways the school is moving towards a higher ratio of student talk is through a pilot in the 6<sup>th</sup> grade with 100 minute blocks in ELA and math for more time on task and placing tutors in the classroom to work with smaller homogeneous skill-based groups that the teacher then rotates through the groups. The CSO site visit team observed these elements in all of the 6<sup>th</sup> grade classroom observations.

Classrooms observed by the CSO team were mostly well managed and organized, and generally students seemed aware of classroom routines and procedures. A variety of different instructional models and groupings were used, including independent activities, one-to-one tutoring, small group sessions, station teaching, and explicit whole group instruction. CSO team members observed differentiation in some, but not all classrooms. Students were generally engaged and on-task during the CSO team's classroom observations.

The tutors provide an hour of ELA and an hour of math instruction for each student during the school day. In the 6<sup>th</sup> grade, as part of a pilot, have tutors are in classroom for math and ELA, supporting teachers as they rotate through homogeneous skill-based groups. The school reported that the Director of Tutor Corps in collaboration with the Principal and Executive Director create the lessons for tutorial.

### Assessment and Program Evaluation

The school reported that they have a quarterly internal assessment cycle, which is aligned to the grade-level scope and sequence. At the beginning of the school year, students take diagnostic assessments to inform the needs of the individual student that will be supported through the school's tutorial model. The school also administers formative assessments in each of the core content areas, through daily exit tickets in math, science, and social studies, and twice weekly through short essays in ELA. In addition, the school's summative assessments include weekly quizzes in math and science, critical and analytical essays in ELA, and research projects in social studies.

Great Oaks uses Mastery Connect for its assessment data tracking and reporting, which allows instructional leaders and teachers to determine which standards need to be retaught. Teachers review student assessment data on a weekly basis in their coaching meetings, to identify trends in standards mastery. The school leadership team reported that they hold school-wide data days three times a year for reviewing and planning student assessment data. The school has begun to encourage student ownership of their academic progress through a student data wall, where students can see their progress on goals in Khan Academy and Fountas & Pinnell or Lexile and receive merits for successfully meeting them.

During the ten days of summer professional development, teachers learn how to use Mastery Connect and the data that is tracked through the system. They also get professional development on how to use data to determine what standards need to be revisited. During the school year, they hold three data days where school leadership and teachers spend time review student assessment data and making instructional decisions based on the data. As a grade team, teachers check in every week to review student performance through assessment results, homework and test grades, and exit tickets. They then decide on what to focus their reteach based on if less than 75% of the class has demonstrated mastery for specific standards. Content teams, in both math and reading, meet determine trends and any instructional or curriculum changes that need to happen grade-wide.

Great Oaks empowers their students to own their student academic progress through a student data wall that was observed on the site visit, which tracks individual students' progress on Khan Academy for math, and Fountas & Pinnell or Lexile levels for ELA, correlating to benchmark scores. To invest students in their own data, the student works with their advisor to set their own monthly progress goals and incentivized through the merit system to meet them.

### Supports for Diverse Learners

The school reported that the Director of Inclusive Learning leads the student special services team that is comprised of three special education certified learning specialists, one certified English as a new language (ENL) teacher, a school social worker, a speech and language therapist, and a paraprofessional. Beginning in the 2017-2018 school year, the school piloted a 6<sup>th</sup> grade academy that employs a co-teaching model with flexible grouping. Tutors also support the small-group instruction in the classroom. The groups are homogeneous by skill level and changed every few weeks, based on student results on assessments. In the 7<sup>th</sup> and 8<sup>th</sup> grades, classes either follow an Integrated Co-Teaching (ICT) model or a learning specialist supports a general education teacher with pull out Special Education Teacher Support Services (SETSS).

The school reported that ELL students either have one period of ENL instruction through push-in services by the ENL teacher or through small group instruction during tutorial. Two observed classes providing ELL services included the ENL teacher working with 2-3 students, using both push in and pull out formats.

The school leadership focus group discussed how they have begun implementing Universal Design for Learning to encourage students to have agency over their learning. As an example, the school leadership talked about how student can ask for different products, such as white boards, computers, pencil or paper, to utilize as their tools for independent work. The board focus group discussed the pilot implementation of a model based on Kunskapsskollan (KED), called Dream Chasers that has students set and monitor their own academic and character goals. The model supports both students who are not yet proficient in standards, as well as students who are advanced. In addition, the school also added a Saturday School for students to improve proficiency and offer enrichment programming.

**Benchmark 3: Culture, Climate and Family Engagement**

*The school has systems in place to support students’ social and emotional health and to provide for a safe and respectful learning environment. Families, community members and school staff work together to share in the responsibility for student academic progress and social-emotional growth and well-being. Families and students are satisfied with the school’s academics and the overall leadership and management of the school.*

**Finding: Meets**

<u>Element</u>	<u>Indicators</u>
1. <i>Behavior Management and Safety</i>	<ul style="list-style-type: none"> <li>a. The school has a clear approach to behavioral management, including a written discipline policy.</li> <li>b. The school appears safe and all school constituents are able to articulate how the school community maintains a safe environment.</li> <li>c. The school has systems in place to ensure that the environment is free from harassment and discrimination.</li> <li>d. Classroom environments are conducive to learning and generally free from disruption.</li> </ul>
2. <i>Family Engagement and Communication</i>	<ul style="list-style-type: none"> <li>a. Teachers communicate with parents to discuss students’ strengths and needs.</li> <li>b. The school assesses family and student satisfaction using strategies such as surveys, feedback sessions, community forums, or participation logs, and considers results when making schoolwide decisions.</li> <li>c. The school has a systematic process for responding to parent or community concerns.</li> <li>d. The school shares school-level academic data with the broader school community to promote transparency and accountability among parents, students and school constituents.</li> </ul>
3. <i>Social-Emotional Supports</i>	<ul style="list-style-type: none"> <li>a. School leaders collect and use data to track the socio-emotional needs of students.</li> <li>b. School leaders collect and use data regarding the impact of programs designed to support students’ social and emotional health.</li> </ul>

**Summative Evidence for Benchmark 3:**

Behavior Management and Safety

The school has a consistent approach to behavioral management, which is focused on a positive student-centered culture. The school’s discipline system includes deductions and merits, with a school – wide classroom escalating cycle of a warning, reminder to whole class, close proximity, and then a deduction. Students are positively reinforced with merits and Oak Bucks, which can then be spent at the merit store. Examples of rewards that can be bought with Oak Bucks include a dress down day or an hour off of detention time. The school reports that in alignment with the school’s mission, the goal of their behavioral management system is to foster an environment that is focused on learning. The school’s Family Handbook includes its discipline policies and general school expectations.

The school started to move towards restorative practice in the 2016-2017 school year and is also shared in the school’s Family Handbook. The school leadership team reported that the dean of students introduced to all staff over the summer of 2017, taking a phased approach to implementing the

restorative approaches. School leadership stated in the focus group that their goal is to keep students in the classroom, and that they have begun to see a decline in suspension rates. The school has three deans, two deans of students and one culture coach, who emphasize relationship building and are accessible at all times for dean referrals.

The school appears to have a safe environment that is free of harassment and discrimination. During the CSO site visit, the review team noted minimal or no disruptions by students in classrooms or hallways.

### Family Engagement and Communication

School leadership reported that they have several systems and processes in place to foster family engagement and communication. Teachers and tutors are expected to make weekly phone calls to parents and guardians to discuss the students' academic progress. The school also holds report card pick up nights, where families are invited to come to the school to meet with teachers and staff. Since the school has a large population of non-English speaking students, the school reported that it ensures all written communication is translated into native languages of the families and that bilingual staff are present for family events to provide on-site translation if needed. During the school leadership team focus group, the principal spoke about a new monthly initiative called Pastries with the Principal, which is an open forum for parents to come meet with the principal. Another new initiative starting in the 2017-2018 school year is a family engagement committee comprised of staff who will be responsible for creating events that meet the needs and feedback from the parent community. The school posts all announcements on the school's website and utilizes a text message system to notify families of updates and reminders.

The CSO site review team met with a parent focus group, whose participants discussed the communication they receive from the school. Some examples of forms of communication included a text group with teachers, emails, and weekly updates from tutors. They also mentioned that if their child is absent, the teacher emails them with the work that their child missed. The parents all noted that they were familiar with the school's online system, Power School, which shares their child's grades, homework assignments, and class participation.

The school uses the NYC DOE parent survey to assess parent satisfaction. In the 2016-2017 survey, although 47% of parents from the school completed the survey, 95% of the parents/guardians who completed it agreed that school staff regularly communicates with them about how they can help their children learn. The school reported that they give surveys to parents during family events to assess how families feel the school supports their and their students' needs. The school has a Concerns Handling Procedure that describes the process for any complaints or issues, which entails a first step of frontline resolution and if not resolved, escalating to a second investigation step that involves the board as a final stage for complaints. During the parent focus group, all parents expressed that they felt comfortable bringing any concerns they had to teachers and administration.

### Social-Emotional Supports

The school leadership team reported that the school utilizes the Second Step curriculum for a social-emotional class in the 6<sup>th</sup> and 7<sup>th</sup> grades. The curriculum is research-based and works to develop students' social-emotional skills, such as empathy and cooperation.

The school utilizes its student information system, ESchools Plus, to track and report on student behavior data. Staff that supports student behavioral management and social-emotional learning includes the two deans of students, a culture coach, and a full-time social worker. For students that exhibit challenges with social or emotional management, the school reports that it has an Extended Behavior Support Cycle that is monitored weekly and involves a tiered system of supports to help students meet behavior goals.

## Benchmark 4: Financial Condition

*The school is in sound and stable financial condition as evidenced by performance on key financial indicators.*

### Finding: Meets

#### Important Notes:

- The key financial indicators used to evaluate this benchmark will be presented within a separate fiscal dashboard instrument that will provide context for the school's performance on each of the metrics, outline the specific targets for each metric, and also provide additional subsidiary detail on each calculation.
- Unless otherwise indicated, financial data is derived from the school's annual independently audited financial statements.

<b>1. Near-Term Indicators:</b>	
1a.	Current Ratio
1b.	Unrestricted Days Cash
1c.	Enrollment Variance
1d.	Composite Score
<b>2. Sustainability Indicators:</b>	
2a.	Total Margin
2b.	Debt to Asset Ratio
2c.	Debt Service Coverage Ratio

### Summative Evidence for Benchmark 4:

#### Financial Condition

Great Oaks Charter School appears to be in very good financial condition as evidenced by performance on key indicators derived from the school's independently audited financial statements.

The Charter School Office reviews the financial performance and management of charter schools using quantitative and qualitative methods. Near-term indicators, such as the current ratio and unrestricted days cash, are measures of liquidity and of the charter school's capacity to maintain operations. Long-term indicators, such as total margin and debt-to asset ratio, are measures of the charter school's capacity to remain viable and to meet financial obligations.

#### Overall Financial Outlook

A *composite score* is an overall measure of financial health calculated by the Department's Office of Audit Services. This score is based on a weighting of primary reserves, equity, and net income. A charter school with a score between 1.5 and 3.0 is considered to be in strong financial health. Great Oaks Charter School's composite score for 2015-2016 is 2.4. The table below shows the school's composite scores from 2013-2014 to 2015-2016.

**Great Oaks Charter School's Composite Scores  
2013-2014 to 2015-2016**

<i>Year</i>	<i>Composite Score</i>
2015-2016	2.4
2014-2015	2.6
2013-2014	1.9

Source: NYSED Office of Audit Services

Near-Term Indicators

Near-term indicators of financial health are used to understand the current financial performance and viability of the school. The Charter School Office uses three measures:

The *current ratio* is a financial ratio that measures whether or not a charter school has enough resources to pay its debts over the next 12 months. The ratio is mainly used to give an idea of the school's ability to pay back its short-term liabilities (debt and payables) with its short-term assets (cash, inventory, receivables). The higher the current ratio, the more capable the school is of paying its obligations, with a ratio under 1.0 indicating concern. For 2015-2016, Great Oaks had a current ratio of 2.1.

*Unrestricted cash* measures, in days, whether the charter school can meet operating expenses without receiving new income. Charter schools typically strive to maintain at least 90 days of cash on hand. For fiscal year 2015-2016, Great Oaks operated with 43 days of unrestricted cash.

*Enrollment stability* measures whether or not a charter school is meeting its enrollment projections, thereby generating sufficient revenue to fund ongoing operations. Actual enrollment that is over 85 percent is considered reasonable. Great Oaks's enrollment stability for 2015-2016 was at 71 percent.

Long-Term Indicators

A charter school's *debt to asset ratio* measures the extent to which the school relies on borrowed funds to finance its operations. It is calculated as total liabilities divided by total assets. A ratio of 0.9 or less meets a standard of low risk. For 2015-2016, Great Oaks's debt to asset ratio was 0.5.

*Total margin* measures the deficit or surplus a charter school yields out of its total revenues; in other words, whether or not the school is living within its available resources. Total margin is calculated as net income divided by total revenue. A total margin that is positive indicates low risk. For 2015-2016, Great Oaks's total margin was 4 percent.

## **Benchmark 5: Financial Management**

*The school operates in a fiscally sound manner with realistic budgets pursuant to a long-range financial plan, appropriate internal controls and procedures, and in accordance with state law and generally accepted accounting practices.*

### **Finding: Approaches**

Renewal is based on evidence that the following indicators are generally present:

1. The school has an accurate and functional accounting system that includes monthly budgets.
2. The school sets budget objectives and regularly analyzes its budget in relation to those objectives.
3. The school has allocated budget surpluses in a manner that is fiscally sound and directly attends to the social and academic needs of the students attending the school.
4. The school has and follows a written set of fiscal policies.
5. The school has complied with state and federal financial reporting requirements.
6. The school has and is maintaining appropriate internal controls and procedures.
7. The school follows generally accepted accounting principles as evidenced by independent financial audits with an unqualified audit opinion, a limited number of findings that are quickly corrected, and the absence of a going concern disclosure.

### **Summative Evidence for Benchmark 5:**

The Charter School Office reviewed Great Oaks Charter School's 2015-16 audited financial statements to determine whether the independent auditor observed sufficient internal controls over financial reporting. The auditor did not identify any deficiencies in internal controls that could be considered material weaknesses.

However, the auditor made the following observations and recommendations:

- Journal entries are not reviewed by anyone other than the preparer; journal entries should be reviewed and approved by a second individual to ensure accuracy.
- In some instances, documentation of a credit card purchase was not accompanied by a receipt and monthly statements were not on file; all receipts should be submitted and all receipts and statements should be on file.
- Two awards from the Great Oaks Foundation have no formal agreement between the two entities; the grants should be formalized via grant agreements.

## Benchmark 6: Board Oversight and Governance

*The board of trustees provides competent stewardship and oversight of the school while maintaining policies, establishing performance goals, and implementing systems to ensure academic success, organizational viability, board effectiveness and faithfulness to the terms of its charter.*

### Finding: Meets

<u>Element</u>	<u>Indicators</u>
1. <i>Board Oversight and Governance</i>	<ol style="list-style-type: none"><li>The board recruits and selects board members with skills and expertise that meet the needs of the school.</li><li>The board engages in strategic and continuous improvement planning by setting priorities and goals that are aligned with the school's mission and educational philosophy.</li><li>The board demonstrates active oversight of the charter school management, fiscal operations and progress toward meeting academic and other school goals.</li><li>The board regularly updates school policies.</li><li>The board utilizes a performance-based evaluation process for evaluating school leadership, itself and providers.</li><li>The board demonstrates full awareness of its legal obligations to the school and stakeholders.</li></ol>

### Summative Evidence for Benchmark 6:

Great Oaks has had a consistent and stable Board of Trustees, currently comprised of eight board members. The board members have a diverse set of skills and expertise, meeting the needs of the school. Board turnover was primarily attributed to board members who moved out of state and personal circumstances. The board has in place recruitment practices and an application process for prospective board members.

The board's primary challenge for improvement planning has been finding facility to allow for the school's projected growth. The board has made the decision to postpone the original charter expansion to the high school grades, until it has secured a facility that would accommodate the increase in enrollment. However, the board sees this as an opportunity to focus on solidifying the quality of instruction and teaching in the middle school grades.

Since the midterm CSO visit, the board has stabilized the school leadership, by bringing on a new Executive Director in the 2016-2017 school year. The Executive Director provides the board with a dashboard as part of his reporting to the board. The dashboard includes information on academic data, school culture, suspension, attendance, tardiness, enrollment, and a monthly overview of school events. During the board focus group, the board members present reported that with the hire of the current Executive Director, the school has experienced a change in a positive direction with a stronger consensus on curriculum, an improved connection made between teachers and the Tutor Corp, and more effective deployment of the tutors.

The board focus group also discussed that they evaluate the Executive Direction annually with a rubric created by the Great Oaks Foundation, which includes academic performance metrics, including both

absolute proficiency as measured on state assessments and student growth year-over-year, enrollment, and teacher retention. The board also mentioned that the board's academic committee provides the Executive Director with more informal feedback throughout the school year, and has an ongoing dialogue about curriculum and any instructional concerns or highlights.

The board reported that they conduct annual board evaluations and then use the summer retreat to reflect and review the survey responses. During the board focus group, the board acknowledged that state assessment results are not available by the time of their summer retreat, but use the internal assessment results to analyze the school's academic performance. They described that the retreat is the time when they discuss what is working, what needs to be improved, and how to continue to create success for the school. The board also utilizes Board on Track and feedback surveys after board meetings to hold themselves accountable. The board mentioned that they also take into account feedback data from teacher surveys.

The board maintains oversight of the charter management organization, the Great Oaks Foundation. Board members reported that they have a strong relationship with the foundation. The board annually evaluates the contracted services provided by the foundation.

The board demonstrates awareness of its legal obligations to the school and stakeholders, and regularly updates school policies, after school leadership reviews and proposes any modifications or updates.

**Benchmark 7: Organizational Capacity**

*The school has established a well-functioning organizational structure, clearly delineated roles for staff, management, and board members. The school has systems and protocols that allow for the successful implementation, evaluation, and improvement of its academic program and operations.*

**Finding: Meets**

<i>Element</i>	<i>Indicators</i>
1. <i>School Leadership</i>	<ul style="list-style-type: none"> <li>a. The school has an effective school leadership team that obtains staff commitment to a clearly defined mission and set of goals, allowing for continual improvement in student learning.</li> <li>b. Roles and responsibilities for leaders, staff, management, and board members are clearly defined. Members of the school community adhere to defined roles and responsibilities.</li> <li>c. The school has clear and well-established communication systems and decision-making processes in place which ensures effective communication across the school.</li> <li>d. The school successfully recruits, hires, and retains key personnel, and makes decisions – when warranted – to remove ineffective staff members.</li> </ul>
2. <i>Professional Climate</i>	<ul style="list-style-type: none"> <li>a. The school is fully staffed with high quality personnel to meet all educational and operational needs, including finance, human resources, and communication.</li> <li>b. The school has established structures for frequent collaboration among teachers.</li> <li>c. The school ensures that staff has requisite skills, expertise, and professional development necessary to meet students’ needs.</li> <li>d. The school has systems to monitor and maintain organizational and instructional quality—which includes a formal process for teacher evaluation geared toward improving instructional practice.</li> <li>e. The school has mechanisms to solicit teacher feedback and gauge teacher satisfaction.</li> </ul>
3. <i>Contractual Relationships</i> □ N/A	<ul style="list-style-type: none"> <li>a. The board of trustees and school leadership establish effective working relationships with the management company or comprehensive service provider.</li> <li>b. Changes in the school’s charter management or comprehensive service provider contract comply with required charter amendment procedures.</li> <li>c. The school monitors the efficacy of contracted service providers or partners.</li> </ul>

**Summative Evidence for Benchmark 7:**

School Leadership

The school has a defined leadership team with clear roles and responsibilities. The executive director is the sole leader who reports directly to the board, with the remainder of the leadership team reporting into the executive director. After some leadership turnover in the middle of the charter term, the current executive director started with Great Oaks at the beginning of the 2016-2017 school year and has brought stability to the leadership team. The leadership team includes the principal, a director of operations, a tutor corp director, two deans of students, a director of inclusive learning, and a culture lead. The school reported that goals for the year are presented at staff orientation at the beginning of

the school year, and then throughout the year are revisited during weekly professional development. The school reported that they track progress towards the school-wide goals in a dashboard that is accessible by all staff and is updated on an ongoing basis. The board focus group mentioned that they have brought in a consultant on human capital and supervisory approaches to support and coach the school leadership team.

The leadership team outlined the process for recruiting and hiring qualified teachers, during the school leadership team focus group, which the school does in coordination with the Great Oaks Foundation. The Foundation has a director of recruitment, who conducts a majority of outreach and begins the application process for teachers. The director of recruitment makes sure the website is up-to-date, represents the school at recruitment fairs, and has relationships with colleges, national nonprofits, and education-focused community organizations. The school leadership team spoke about how word of mouth with current staff has also been an effective recruitment strategy. As part of the four-step process to hire teachers, the executive director discusses candidates with the director of recruitment, and then selects ones to bring in for a full-day interview that includes a school tour, a demo lesson, self-reflection, and mini-coaching. Staff gets to meet with candidates to assess culture fit.

Teacher retention has been a focus for the school leadership team. The school reported that 67% of the teachers returned for the 2017-2018 school year. During the focus group, they discussed how they have adjusted their approach by analyzing teacher survey data and as a leadership team identified areas that needed improvement and set goals around those areas for the leadership team. The leadership team reported that they seek to create a positive adult culture, through space-sharing, collaboration, and relationship-building. During the board focus group, the board members spoke about teacher retention efforts from a budget perspective, including review of salary compensation, incentives for high performing teachers, professional development for new teachers, and incentives for the executive director around staff morale. The board also hosts a thank you event for teachers at the end of the school year.

School leadership reported that they have improved the structures in place for clarity of roles between the tutors and classroom teachers. The tutors come from AmeriCorps and report into the tutor corp manager. The tutors are assigned to specific teams, both in content and grade level. In the 6<sup>th</sup> grade with the new pilot, tutors work with a teacher and serve as instructional assistants under the teacher's leadership. In the 7<sup>th</sup> and 8<sup>th</sup> grades, the tutors work with students during set tutor time blocks. School leadership reported that the Tutor Corp can also be a pipeline for new teachers.

### Professional Climate

Aside from the school-level leadership team, Great Oaks has access to and is supported by high quality academic and operational personnel at the Great Oaks Foundation, as detailed in the management contract. The Chief Academic Officer (CAO) works closely with and reviews the school's Executive Director, utilizing the Great Oaks Foundation's management model and standards. During the site visit, the CAO spoke about how the network has improved its structure and increased its personnel, providing a more centralized support for the schools and consistent standards applied across the network.

The school reported that teachers have opportunities to meet vertically in content teams across grade level, and horizontally as a grade team, during daily common planning times and in structured time during professional development half-days. In addition to common planning times, the school leadership team discussed a new structure of committees for the 2017-2018 school year to foster communication

and collaboration across staff, and as a direct result of feedback from survey data. The committees are for: data, staff culture, professional development, student culture, student-center learning, and family engagement. The committees are comprised of a school leader, tutors, and teachers.

Professional development at Great Oaks includes a 12-day orientation and training prior to the start of the school year, weekly half-days that allow for 2 hours of professional development, and 3 full days focused on data analysis throughout the year. School leadership reported that teacher leaders are invited to run professional development and share best practices. Further, the school utilizes Professional Learning Communities (PLC) that encourages collaboration between teachers and tutors. The school reported that the PLCs take place twice per month during the professional development half-day and are completely staff led and run. The Tutor Corps also receives professional development through the school's partnership with Crossroads of Learning, an online platform that offers research-based, self-paced trainings.

The school reported that its teacher evaluation process includes three conferences between the Principal and the teacher. The first conference happens at the start of the school year and includes a teacher reflection, goal setting, and an initial baseline observation and rubric rating. At the midyear conference, the teacher's focus area and progress towards goals are reviewed. The final conference at the end of the year includes all data and the Principal determines a summative rating. Great Oaks utilizes the Skyrocket Teacher Coaching and Evaluation Rubric. Throughout the year, teachers are informally observed and given feedback and coaching, aligned to their goals. The school leadership team reported that over the last year, they have implemented student data trackers and dashboards to promote data-driven instruction and shift the mindset from anecdotal to a quantitative approach.

In addition to the NYC Department of Education School Survey, Great Oaks conducts formal feedback surveys three times a year using the Panorama Education Survey, which is used network-wide across Great Oaks schools and compares the school's data to national results. The school reported that it provides opportunity for informal feedback through leadership team member office hours and within the PLC meetings. The board focus group cited adding support from two instructional coaches from the Great Oaks Foundation for the 2017-2018 school year, as an example of the school leadership team and board taking into account feedback from the surveys.

### Contractual Relationships

The school has an established management agreement with the Great Oaks Foundation. The contracted services include tasks related to Finance and Human Resources, Recruitment, Development, Operations and Facilities, and Academic Support and Training. Over the course of the charter term, the Great Oaks Foundation has expanded its central office, providing increased services and standardized supports. The board focus group reported that they annually negotiate the contract with the foundation and maintain a level of autonomy in their oversight of the school. The school provided criteria they use as part of their evaluation of the foundation's services.

During the site visit, the CAO mentioned recent ways in which the foundation has supported the school, including recruitment and hiring of the current Executive Director and Principal, creating teacher videos to highlight strong teachers in the network, and the Chief Operating Officer of the foundation leading the capital campaign for the school's facility. The CAO also discussed areas the foundation is still looking to grow, including adding special education leadership at the network level.

## Benchmark 8: Mission and Key Design Elements

*The school is faithful to its mission and has implemented the key design elements included in its charter.*

### Finding: Meets

<u>Element</u>	<u>Indicators</u>
1. <i>Mission and Key Design Elements</i>	<ul style="list-style-type: none"><li>a. School stakeholders share a common and consistent understanding of the school’s mission and key design elements outlined in the charter.</li><li>b. The school has fully implemented the key design elements in the approved charter and in any subsequently approved revisions.</li></ul>

### Summative Evidence for Benchmark 8:

The board, school leaders, and staff share a common and consistent understanding of Great Oak’s mission and key design elements. The school reported that teacher, family, and board orientations, all begin with a review of the mission.

The school implements the key design elements outlined in the charter. During the CSO site visit, the school stakeholders discussed high expectations, data-driven instructional practices, and daily tutoring, in each focus group. The most prominent design elements that were observed in practice on the site visit, included: school culture of high academic and behavioral expectations, focus on building relationships with students and their families, highly individualized academic program through daily tutoring delivered through the Tutor Corps, small school environment, more time on task, and a focus on English language learners.

**Benchmark 9: Enrollment, Recruitment, and Retention**

*The school is meeting or making annual progress toward meeting the enrollment plan outlined in its charter and its enrollment and retention targets for students with disabilities, English language learners, and students who are eligible applicants for the free and reduced priced lunch program; or has demonstrated that it has made extensive good faith efforts to attract, recruit, and retain such students.*

**Finding: Meets**

<i>Element</i>	<i>Indicators</i>
1. <i>Targets are met</i>	a. The school maintains sufficient enrollment demand for the school to meet or come close to meeting the enrollment plan outlined in the charter.
2. <i>Targets are not met</i>	<p>a. The school is making regular and significant annual progress toward meeting the targets.</p> <p>b. The school has implemented extensive recruitment strategies and program services to attract and retain students with disabilities, English language learners, and students who are eligible for free and reduced priced lunch. Strategies include, but are not limited to: outreach to parents and families in the surrounding communities, widely publicizing the lottery for such school, efforts to academically support these students, and enrollment policy revisions, such as employing a weighted lottery or enrollment preference, to increase the proportion of enrolled students from the three priority populations.</p> <p>c. The school has implemented a systematic process for evaluating recruitment and outreach strategies and program services for each of the three categories of students, and makes strategic improvements as needed.</p>

*Student Demographics – Great Oaks Charter School Compared to District of Location*

	2015-2016			2016-2017		
	<b>GO-NYC</b>	NYC CSD #1	Variance	<b>GO-NYC</b>	NYC CSD #1	Variance
Students with Disabilities	<b>33%</b>	28%	+5	<b>32%</b>	31%	+1
English Language Learners	<b>9%</b>	9%	0	<b>9%</b>	7%	+2
Economically Disadvantaged	<b>81%</b>	66%	+15	<b>70%</b>	65%	+5

In the 2015-2016 school year, 72% of students were retained in Great Oaks compared with 74% in the district of location. The 2015-2016 school year was the first year Great Oaks was in CSD 1, after being in CSD 2 for its first two years of operation.

### **Summative Evidence for Benchmark 9:**

Great Oaks meets the enrollment plan outlined in its revised charter. The school enrolls a higher percentage of students with disabilities (SWDs), English Language Learners (ELLs) and economically disadvantaged (ED) students, as compared to its district of location, Community School District (CSD) 1.

The school continues to make good faith efforts to recruit, serve, and retain SWD, ELL, and ED subgroup student populations. For example, the school continues to refine its recruitment and outreach strategies for these subgroups, including, but not limited to:

- translating recruitment flyers and postcards in multiple languages, including Mandarin and Spanish
- ensuring bi-lingual staff members are at recruitment events
- posting application information with DOE special education
- Director of Inclusive Learning holding meetings with new families of SWDs
- partnering with local community-based organizations, Grand Street and University Settlements
- giving preference to ELLs in the school's lottery

For the 2015-2016 school year, although Great Oaks had a comparable overall retention rate as compared to its district of location, the school retained a notably higher percentage of ELLs with 71%, than the district of location's retention for ELLs of 63%. Great Oaks also retained similar percentages of students with disabilities (SWD) and economically disadvantaged (ED) students with 72% retention for both special population subgroups, compared with the district of location, which had 72% retention for ED students and 73% for SWD.

**Benchmark 10: Legal Compliance**

*The school complies with applicable laws, regulations, and the provisions of its charter.*

**Finding: Meets**

<i>Element</i>	<i>Indicators</i>
1. <i>Legal Compliance</i>	<p>a. The school has compiled a record of substantial compliance with applicable state and federal laws and the provisions of its charter including, but not limited to: those related to student admissions and enrollment; FOIL and Open Meetings Law; protecting the rights of students and employees; financial management and oversight; governance and reporting; and health and safety requirements.</p> <p>b. The school has undertaken appropriate corrective action when needed, and has implemented necessary safeguards to maintain compliance with all legal requirements.</p> <p>c. The school has sought Board of Regents and/or Charter School Office approval for significant revisions.</p>

**Summative Evidence for Benchmark 10:**

Great Oaks has complied with the legal obligations and applicable state and federal laws, as well as the provisions of its charter.

During the charter term, the school sought CSO and Board of Regents approval for two significant revisions, both related to the school’s facility. Both revisions were made in a timely manner and in consultation with CSO. The first revision entailed the school’s facility move, which meant a change in community school district. The second revision was a delay in the school’s growth plan to the high school grades, due to not being able to secure a larger facility to house the expanded grades. The school has decided to extend the delay of serving students in grade 9 until 2018, and as of the time of the report has submitted this request to CSO.