

Location

- 1900 Atrisco Dr NW, Albuquerque, NM 87120



School Leadership

- Jesús Moncada, Principal
- Governing Board Members:
 - Dr. Barbara Medina, President
 - Ben Maes, Treasurer
 - Beth Esquivel, Secretary
 - Roxana Marcela de La Torre Amado

Mission

Christine Duncan Charter School will promote individual, social and high academic achievement with differentiated instruction in a dual language setting. We value environmental stewardship, active community participation, family centered learning and cultural diversity.

La Christine Duncan's Heritage Academy promoverá el aprendizaje social y un alto rendimiento académico individual en un ambiente bilingüe con instrucción diferenciada. Nosotros valoramos el medio ambiente y la participación activa de la comunidad, el aprendizaje de la familia y la diversidad cultural.

Vision

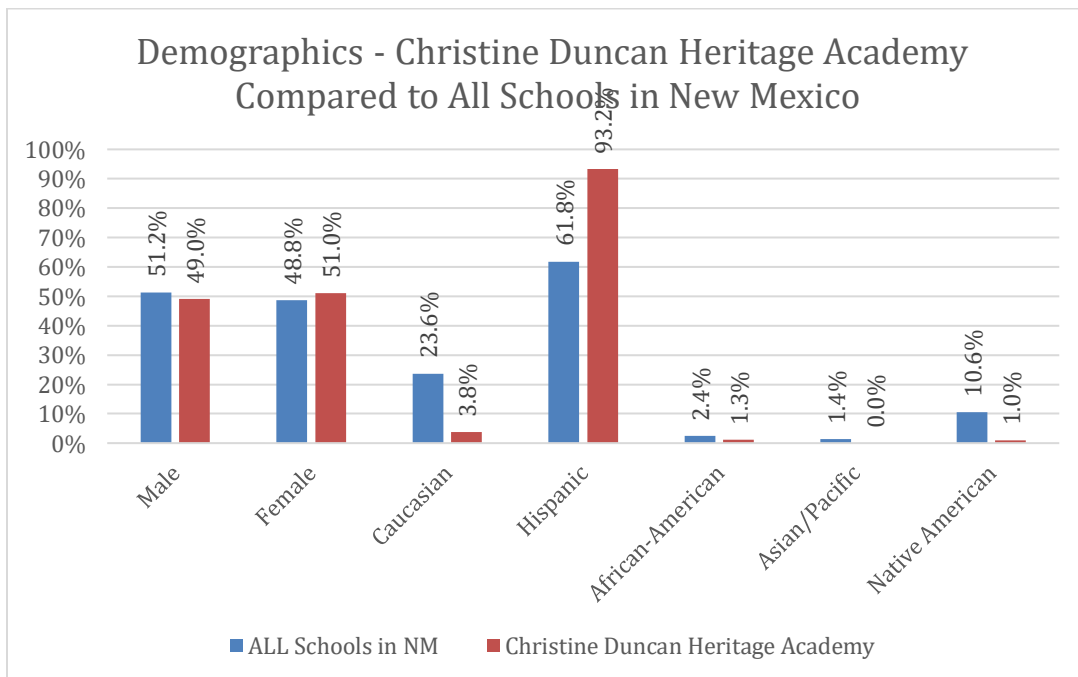
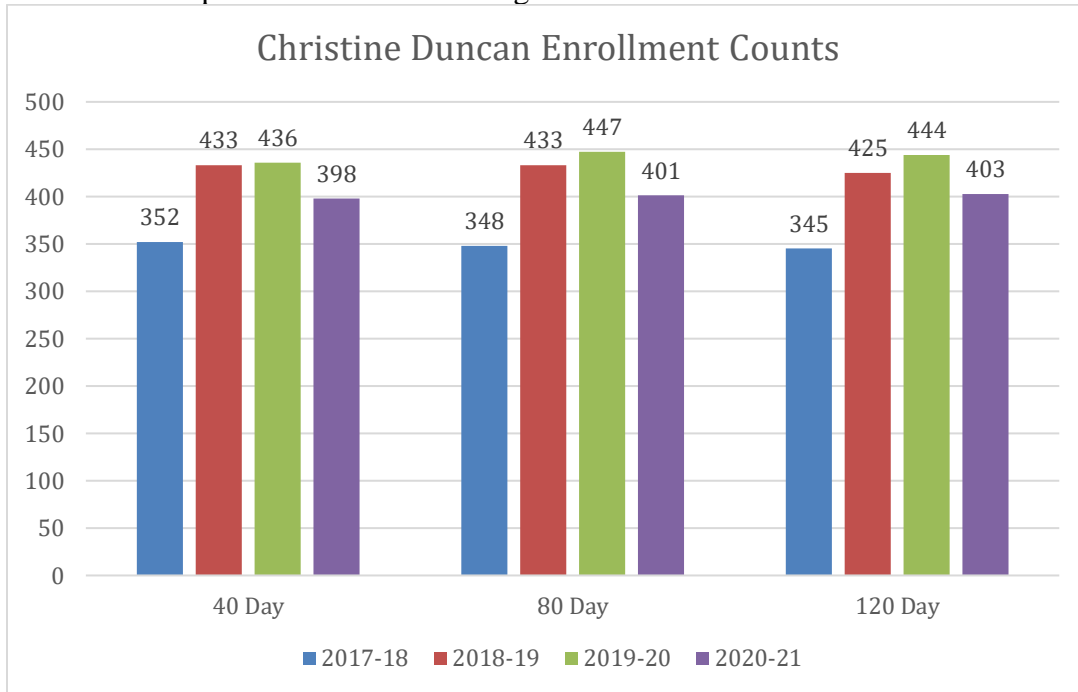
*Making a difference with every child!
¡Haciendo la diferencia en cada niño!*

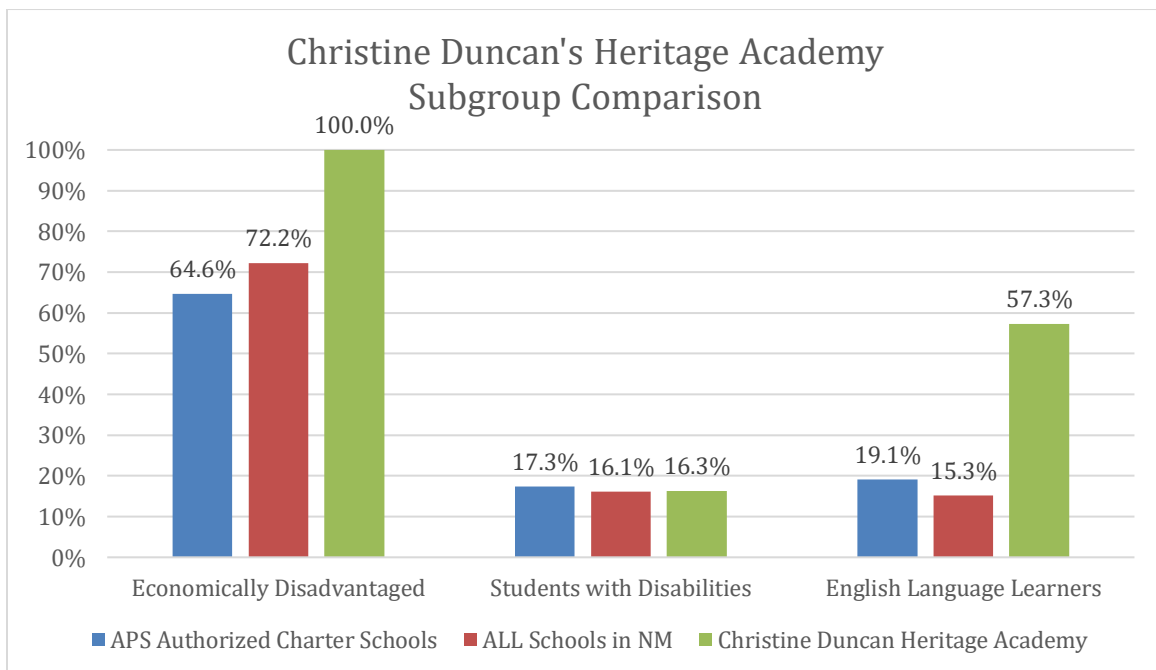
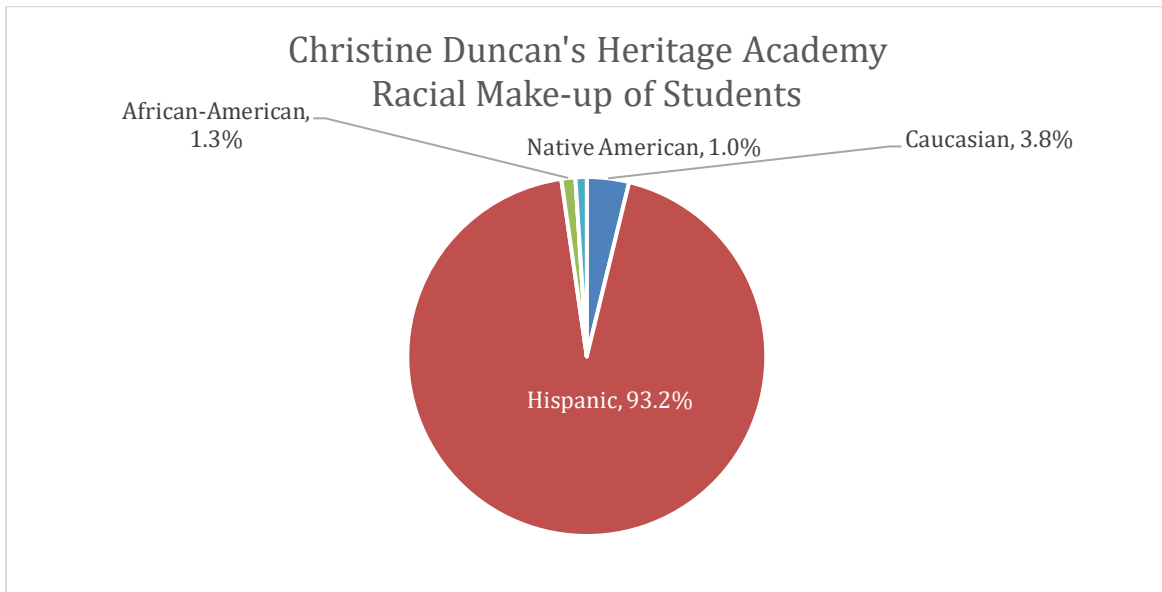
History

- Originally Chartered by APS in 2005
- Renewed by APS in 2016

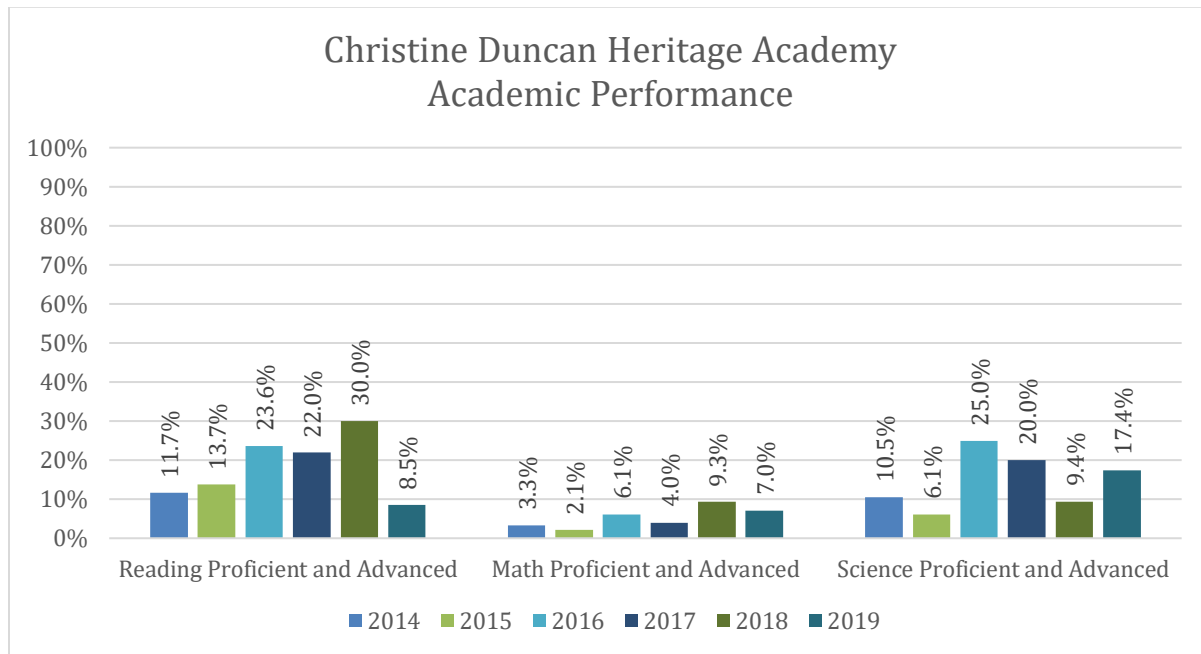
Demographics

- Enrollment cap is 500. For FY22 Budget will be built off of 393 students.





Academic Performance





School Year 2018-19 <i>Baseline Data</i>	School Year 2019-20 <i>No Assessment Data due to COVID-19</i>	School Year 2020-21	School Year 2021-22	Performance Measures	School Year 2022-23	School Year 2023-24	School Year 2024-25	School Year 2025-26
8.5%		<i>Strategic Planning School Refocus/Turnaround</i>			<i>Implementation of Strategic Plan and School Turnaround</i>			
7.0%				Reading	13%	18%	23%	28%
17.4%				Mathematics	10%	15%	20%	25%
				Science	22%	27%	32%	37%

Academic Performance	
	Mission Specific Goals 1) Provide goal statements for your current two mission specific goals. <i>a) If you don't have or know your two mission specific goals, go to step 3.</i> 2) Provide any data from the last calendar year if available. 3) Provide any new mission specific goals or revisions to your current goals.
	2020-21 Evidence of Knowledge Gained 1) How did you measure knowledge gained during the 2020-21? 2) Provide data from the 2020-21? 3) What strategic changes have you made from the data analysis? 4) During the start of the 2021-22 School Year, what did you measure student's levels of academic performance? 5) Are there any major changes to your use of assessments and how you will analyze and respond to the data?
	Staff and Student Support 1) How did you support staff and students during the start of this school year? 2) Describe any strategic initiatives you did for staff, including professional development to help them prepare for the year.
<i>For Spring Site Visit</i>	Re-Entry Plan (Spring) ⇒ <i>Section will be reviewed in the Spring.</i> ⇒ <i>Expectations will be updated and shared by February 2021</i>
	Strategic Planning (90-Day Plan in New Mexico DASH – Fall) 1) Provide highlights of your 90-day plans 2) How has the focus, on changing adult behavior for improvement in academic achievement, impacted your school? 3) How is this related to your strategic plan and mission?
<i>For Spring Site Visit</i>	Strategic Planning (90-Day Plan in New Mexico DASH – Spring) 1) Provide highlights of your 90-day plans 2) How has the focus, on changing adult behavior for improvement in academic achievement, impacted your school? 3) How is this related to your strategic plan and mission?
Educational Plan	
<i>For Spring Site Visit</i>	Mission of the School

	1) Describe how you have been able to maintain your mission during virtual/hybrid education.
<i>For Spring Site Visit</i>	Teaching Aligned to Mission <ul style="list-style-type: none"> Possible virtual classroom observation in the Spring
	Education Law Compliance <ol style="list-style-type: none"> Describe how you are supporting students in improving attendance. Describe any improvements you have made to your attendance policy.
	Social/Emotional Support of Students <ol style="list-style-type: none"> Describe how you have supported students social/emotional needs.
<i>For Spring Site Visit</i>	Discipline Policies and Practices <ol style="list-style-type: none"> Describe or Provide a copy of the data that you used to analyze discipline. Describe any changes you have made to your discipline policy or practice as a result of analyzing that data.
<i>For Spring Site Visit</i>	Controversial Issues <ol style="list-style-type: none"> Provide a copy of your instruction of controversial issues policy
<i>For Spring Site Visit</i>	English Learners <ol style="list-style-type: none"> Describe how you have supported English Learners. Updated Protocol for the Spring
Governing Council - For the following items please provide the information in the Google Document, located on the Google Drive titled "Governing Council Information."	
	Bylaws/Policies
	Controversial Issues
	Membership/Regular Meetings
	Training
	Oversight of School Management
Employees	
<i>For Spring Site Visit</i>	Licensure <ul style="list-style-type: none"> Will be measured through STARS Report
<i>For Spring Site Visit</i>	Employee Rights <ul style="list-style-type: none"> Provide a link to your employee handbook.
<i>For Spring Site Visit</i>	Background Checks <ul style="list-style-type: none"> Provide your Background Check Policy
	Professional Development Plan <ul style="list-style-type: none"> Describe your professional development plan for teachers, staff, and school leaders.
Operations	
	Lottery Processes <p>Provide links/documents of any marketing material used for recruiting, any marketing videos used for recruiting, lottery application, and school enrollment.</p>
<i>For Spring Site Visit</i>	Facilities <ul style="list-style-type: none"> Provide an update on your facility. (ex. Renovating an area, upgrades, improvements, or expansion)
<i>For Spring Site Visit</i>	Safe School Plan <ul style="list-style-type: none"> Will be measured as schools turn in their site safety plan on December 4.



Christine Duncan's Heritage Academy
2021-22 FALL & SPRING Site Visit Report

<i>For Spring Site Visit</i>	Transparency <ul style="list-style-type: none"> • Provide a link to the sunshine portal on your website. • Provide a link to the 2019-20 performance framework on your website.
<i>For Spring Site Visit</i>	Education Technology Plan <ul style="list-style-type: none"> • Describe your education technology plan to support student learning.

	Meets
	Working to Meet
	Does Not Meet



Christine Duncan's Heritage Academy
2021-22 FALL & SPRING Site Visit Report

Finance

Charter School Name: Christine Duncan
Date of Site Visit: September 29, 2021

	Meets
	Working to meet
	Does not meet

Financial Performance

This portion will contain data calculated by Charter School Business Manager after FY20-21 audit has been approved by the State Auditor's office.

1. Current Ratios - Measures the school's ability to pay its debt as they come due. Ratio should be greater than 1:1 and not less than or equal to 0.9
2. Liquidity - Measures the school's ability to pay its obligations over the next 12 months. School should have at least 1 month and not less than .5 months
3. Total Margin - Measures the deficit or surplus a school yields out of its total revenues. Three year should be positive and most recent year is positive
4. Special Education Maintenance Of Effort (MOE) - School YTD expenditures must be equal to or greater than previous year or meet one of the three allowable exceptions

Financial Compliance

	Audit Findings <ul style="list-style-type: none"> • Upload current approved Correction Action Plan <ul style="list-style-type: none"> ○ FY 2019-20 CAP ○ Is number of audit finding 2 or less – No, three findings ○ Have repeat audit findings been cleared from previous year- Yes ○ Are there any significant deficiencies or material weakness audit findings – Yes one significant deficiency
	Internal Control Policies and Procedures <ul style="list-style-type: none"> • Upload updated Internal Control Policies and Procedures
	Chief Procurement Officer Compliance <ul style="list-style-type: none"> • Upload current CPO certificate. <ul style="list-style-type: none"> ○ Jesus Moncada, license has expired, no extension had been granted by the state as of the date of the site visit – Received certificate November 19, 2021 ○ Is CPO registered with NM General Services Department – Yes with expired CPO information • Upload PO list (to date) for FY 21-22 <ul style="list-style-type: none"> ○ Reviewed PO22-00009 Literacy Resources LLC, PO22-00032 STS Education, PO22-00038 Quill Corporation

	<ul style="list-style-type: none"> ○ Are PO's being signed by CPO - Yes ○ Are internal control policies and procedures being followed - Yes
	Business Official License <ul style="list-style-type: none"> • Angie Lerner, license expires June 30, 2024
	Audit and Finance Committee <ul style="list-style-type: none"> • Audit committee – two members of GC, BMaes, one parent, MGreiving, one volunteer with financial expertise, EEsquivel • Finance committee – at least two members of the GC only one BMaes as of Sept 15, 2021
	Financial Reports posted on Website- <ul style="list-style-type: none"> • Charter School Business Manager to review independently: <ul style="list-style-type: none"> ○ Link to Sunshine portal present – Yes under Governing Council ○ Governing Council minutes from most recent GC meeting posted – Last posted August 2021 ○ Financial Reports presented to GC posted on website – Yes ○ BARS have been approved by GC and noted in minutes – Yes ○ Disbursements have been approved by GC and noted in minutes - Yes

Financial Audit

	Bank Reconciliation <ul style="list-style-type: none"> • Upload most recent approved bank reconciliation and balance sheet <ul style="list-style-type: none"> ○ Verify Bank Reconciliation and Balance Sheet – Reviewed August 2021 ○ Are outstanding items on bank reconciliation stale dated per school policy or one year? Checks are valid for one year, no stale dated checks noted. ○ Are bank reconciliations being reviewed and approved by independent person? Charter Leader and Finance Committee review.
	Federal Funds - File name: [School Name] – Federal Fund Report (LTD) <ul style="list-style-type: none"> • Upload detailed list of expenditures for funds 24301, 24308, and 24330 <ul style="list-style-type: none"> ○ Have RfR's for each fund been submitted - Yes ○ What is % expended life to date CARES 97%, CRRSA 2%, ARP funds not available as of date of site visit ○ What has been purchased with funding – List provided ○
	Cash Balances - File Name: [School Name] – Cash Balance <ul style="list-style-type: none"> • Upload document detailing the following: <ul style="list-style-type: none"> ○ Total Revenue ○ Historical Trend ○ Intended use – Saving for buying a building ○ Resolution from Governing Council – will be discussing it
	Payroll Reports



	<ul style="list-style-type: none">• Upload reports submitted for same month as bank reconciliation for verification of date of submission and amounts<ul style="list-style-type: none">○ CRS-1 report due 25th of the following month – Paid 8/24/21○ Educational Retirement Board (ERB) due 15th of each month – Paid 8/12/21○ Retiree Health Care (RHC) due 10th of each month – Paid 8/12/21○ New Mexico Public School Insurance Authority (NMPSIA) due 10th of each month – Paid 8/4/21
	Cash Receipts <ul style="list-style-type: none">• Upload Cash receipt journal from accounting system (to date of upload)<ul style="list-style-type: none">○ Reviewed deposits for 7/29/21, 8/9/21, and 8/18/21○ Upload cash receipt, bank deposit receipt, and corresponding bank statement○ Are deposits being made within 24 hours of receipt - Yes
	Vendor Listing <ul style="list-style-type: none">• Upload current vendor listing, to include address and YTD amounts paid to vendor for FY 20-21<ul style="list-style-type: none">○ Provide vendor name(s) and account listing of invoices paid for janitorial services including Covid cleaning/disinfecting services for FY 20-21. Paid Amaro Carpet Cleaning and Run to Clean \$23,398.44. Also have two custodians that were also paid during that time frame. Teachers were remote, admin was there occasionally. Students returned April 2021

Albuquerque Public Schools
Office of Innovation and School Choice

Christine Duncan's Heritage Academy
Fall Site Visits 2021-22

Special Education Review

0-59% - Does not Meet

60-79% - Working to Meet

80-100% - Meets

1. Processes and Accountability	Total points= 18.8 / 18.8 = 100%
2. IEP Compliance	Total points= 41.0 / 47.0 = 87%
3. Transition Compliance	Total points= 16.0 / 18.0 = 89%
4. Evaluation Compliance	Total points= 17.5 / 21.0 = 83%

Follow-up to previous site visit from Spring 2021		
Site visit - <u>5/11/21</u>	Recommendations	Evidence of Improvement During Current visit
Christine Duncan's Heritage Academy has no pending previously identified concerns.		

*** Highlighted** items have not been completed. Follow-up will be conducted in the **Spring 2022**.

Current site visit - Fall 2021

Reviewer: **Patricia Espinoza** Date: **11/18/21**
 Grades: **PK- 8th** Total Enrollment: **348** SWD: **64** GI: **1**
 Sp. Ed. Providers: **4-SE Teachers & 1 Sp. Ed. Director, 1-SW, 3-SEE.A.s**
 Contracted: **OT, SLP, Diagnostician**

1. Processes and Accountability

**See links to state and federal regulations for additional guidance.*

20 points

1.a. The school has Special Education Policies and procedures that address implementation of IDEA and New Mexico Special Education Rules - Each New Mexico public agency, within the scope of its authority, shall develop and implement appropriate policies, procedures, programs and services to ensure that all children with disabilities who reside within the agency's educational jurisdiction, ... are identified and evaluation and have access to a free appropriate public education (FAPE) in compliance with all applicable requirements of state and federal laws and regulations. If the public charter school is an LEA, that charter school is responsible for ensuring that the requirements are met 6.31.2.9(A), 6.31.2.11(I)(3)

The school has a policy that states their provision of a free appropriate public education for all students with disabilities – 2 points

Total points= **2 / 2**

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1.b. The school has a written process that documents how they complete annual IEPs – 2 points <div style="text-align: right;">Total points= 2 / 2</div>
1.c. The school has a written process that documents how they complete Tri-annual Re-evaluations. – 2 points <div style="text-align: right;">Total points= 2 / 2</div>
1.d. The school has an updated roster for Students with disabilities. Including: name, state ID, grade, Eligibility(ies), last IEP date and last Evaluation date – 3 points <div style="text-align: right;">Total points= 3 / 3</div>
1.e. The School has Discipline plan that outlines implementation of school wide discipline policy for Students with Disabilities. Discipline policy includes specific provisions for students with disabilities and plan for the school to utilize IEP in discipline of students with disabilities – 3 points <div style="text-align: right;">Total points= 3 / 3</div>
1.f. School has a plan for the provision of an Alternative Education Setting (AES) and a written manifestation process. A removal of a child with a disability from the child's current educational placement is a change of placement if: The removal is for more than 10 school days in a row; or The child has been subjected to a series of removals that constitute a pattern (34 CFR §300.536) – 3 points <div style="text-align: right;">Total points= 3 / 3</div>
1.g. The school has a written document explaining their continuum of services. The school shall ensure that a continuum of alternative placements is available to meet the needs of children with disabilities for special education and related services. 34 C.F.R. 300.115(a) – 3 points <div style="text-align: right;">Total points= 3 / 3</div>
1.h. Special Education Coordinator Training Attendance – APS sponsored – Each item - .25 points Sep. 2021 <u>YES</u> Nov. 2021 <u>YES</u> Jan. 2022 <u> </u> Mar. 2022 <u> </u> <div style="text-align: right;">Total points= 0.5 / 0.5</div>
1.i. Special education caseloads are balanced and with a licensed special education teacher per STARS report. Caseload waivers are appropriate for school size – Each reporting period - .33 points 40th <u>YES</u> 80th <u> </u> 120th <u> </u> <div style="text-align: right;">Total points= 0.3 / 0.3</div>
1. Processes and Accountability <div style="text-align: right;">Total 18.8 / 18.8</div>

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2. IEP Compliance

The following parts of the IEP reviewed are in compliance.

**See links to state and federal regulations for additional guidance.*

32 - 50 possible points*

**Points will be adjusted to reflect all areas reviewed.*

2.a. The IEPs reviewed are current per STARS report. An IEP Team meeting must be held to review the child's IEP periodically, but not less than annually, to determine whether the annual goals for the child are being achieved. (34 C.F.R. § 300.324(b)(1)(i)). - **Each reporting period - 2 points**

40th YES

80th

120th

Total points= 2 / 2

No overdue IEPs for the 40th day

2.b. PLPs-Present levels of performance- Includes scores, data and narratives. Must include all related services. The IEP shall include a statement of the child's present levels of academic achievement and functional performance. 34 CFR 300.320(a)(1) -

Must meet all requirements per IEP - Each IEP - 2 points

Total points= 6 / 6

IEP #3 - Present levels missing current evaluation summary, the information included is outdated. (1.5 points)

2.c. Goals- Must be measurable. Must include all related services. An IEP shall include both academic and functional goals. The IEP shall include a statement of measurable annual goals, including academic and functional goals. 34 C.F.R. § 300.320(a)(3) and 71 Fed. Reg. 46662 (August 14, 2006) -

Must meet all requirements per IEP - Each IEP - 2 points

Total points= 5 / 6

IEP #3 - Missing Academic goal (1 point)

2.d. PTGs-Goals must include measurable progress towards goals. The IEP shall include a description of how the child's progress toward meeting the annual goals will be measured; and when periodic reports on the progress the child is making toward meeting the annual goals (such as through the use of quarterly or other periodic reports, concurrent with the issuance of report cards) will be provided to the parent. (34 C.F.R. § 300.320(a)(2)(ii))

Must meet all requirements per IEP - Each IEP - 2 points

Total points= 5 / 6

IEP #3 - Missing some PTGs. (1 point)

2.e. Service Schedule- Accurately reflects beginning date, frequency, duration and location of services, including related services. The IEP shall include a statement of the special education and related services to be provided to the child, or on behalf of the child. (34 C.F.R. § 300.39(b)(3))

Must meet all requirements per IEP - Each IEP - 2 points

Total points= 6 / 6

2.f. LRE- data based and reflects how the student is placed within the continuum of service. The Least Restrictive Environment section of the IEP provides the necessary documentation that the IEP Team determined placement in the least restrictive environment according to the IDEA requirements and this procedural directive. (20 U.S.C. § 1412(a)(5)(A); also, 34 C.F.R. § 300.114(a)(2))

Must meet all requirements per IEP - Each IEP - 1 point

Total points= 2 / 3

All 3 IEPs - Impact statements need to be updated, some information is incorrect. (.5 points each)

2.g. PWN- Prior Written Notice - Records all proposals by school and parents- documents what was discussed including the continuum of services. Special education and related services are included in a child's FAPE; and therefore, a proposal to revise a child's IEP, which typically involves a change to the type, amount, or location of the special education and related services being provided to a child, would trigger requirements to provide prior written notice. (34 CFR § 300.503)

Must meet all requirements per IEP - Each IEP - 2 points

Total points= 5 / 6

IEP #2 & #3 - Some proposals missing information or incorrect proposal. (IEP #1 - 1.5 points, IEP #2 - 1. point)

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2.h. IEP Team Participants-The IEP Team Meeting Participants signature page of the IEP shall reflect the members of the IEP Team who were present and participated in the IEP Team meeting, and shall further provide the necessary documentation that the IEP Team meeting was duly constituted. The names of the IEP Team meeting participants shall be typed as well as their participation reflected by their signature. (34 C.F.R. § 300.321(a))

Must meet all requirements per IEP – Each IEP – 1 point

Total points= 3 / 3

2.i. Parent Involvement: Schools shall afford parents of a child with a disability an opportunity to participate in meetings with respect to the identification, evaluation, and educational placement of the child and the provision of FAPE to the child. (34 C.F.R. § 300.501(b)(1))

Must meet all requirements per IEP – Each IEP – 1 point

Total points= 3 / 3

2.j. Parent notification: The steps Schools shall take to ensure parent participation in EDT and/or IEP Team meetings shall include notifying parents of the meeting early enough to ensure that they will have an opportunity to attend and scheduling the meeting at a mutually agreed on time and place. (34 C.F.R. § 300.322(a))

Must meet all requirements per IEP – Each IEP – 1 points

Total points= 3 / 3

IEP #2 - Missing Parent invitation to the amendment.

The following items will be reviewed only for IEPs that include data indicating these items should be addressed by the IEP team.

Total points will be adjusted accordingly.

2.k. Testing Accommodations – A statement of accommodations necessary to measure the academic achievement and functional performance of the child on state and districtwide assessment. 34 CFR 300.320(a)(6)(i)

Must meet all requirements per IEP – Each IEP – 1 point

Total points= 3 / 3

2.l. FBA/BIP if appropriate- The IEP team must, in the case of a child whose behavior impedes the child's learning or that of others, consider the use of positive behavioral interventions and supports, and other strategies, to address that behavior. Including conducting Functional Behavior Assessments (FBAs) and integration of Behavioral Intervention Plans (BIPs) into the IEPs. 34 CFR 300.324(a)(2)(i), (6.31.2.11(F) (1) NMAC)

Alternate Assessment – If the IEP team determines that a child must take an alternate assessment, the IEP must contain a statement of why the child cannot participate in the regular assessment and why the particular alternate assessment selected is appropriate for the child. 34 CFR 300.320(a)(6)(ii). Alternate Assessment must be included in the IEP.

ESY - The school has ESY eligibility data recorded for every student receiving Extended School Year services.

ESY services may be provided only if a child's IEP Team determines, on an individual basis, that the services are necessary for the provision of FAPE to the child. (34 C.F.R. § 300.106(a)(1-2))

Each item per IEP – 1 point

Total points= 0 / 0

2. IEP Compliance

Total points= 41 / 47 Points

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3. Transition Compliance

The transition plans for students with disabilities (age 14+) are in compliance with Indicator 13.

**See links to state and federal regulations for additional guidance.*

10 - 30 possible points*

**Points will be adjusted to reflect all areas reviewed.*

3.a. Measurable post-secondary goals: The IEP must include appropriate measurable post-secondary goals based upon age-appropriate transition assessments related to Training, Education, Employment, and **where appropriate**, independent living skills. (34 C.F.R. § 300.320(b) (1); 6.31.2.11(G) (3) (a) NMAC

Must meet all requirements per IEP – Each IEP – 1 point

Total points= 2 / 2

3.b. Post-secondary goals updated annually – IEP must be current and contain Measurable post-secondary goals. Goals should be reviewed/updated annually.

Must meet all requirements per IEP – Each IEP – 1 point

Total points= 2 / 2

3.c. Transition assessment – The IEP must include evidence that the measurable post-secondary goals were based on age-appropriate transition assessment(s). Age-appropriate transition assessments from multiple sources providing information on strengths, needs, preferences, and interests.

Must meet all requirements per IEP – Each IEP – 1 point

Total points= 2 / 2

3.d. Course of study – The IEP must include a course of study that will reasonably enable the student to meet his or her post-secondary goals. Included in the course of study: A multi-year description, current school year through anticipated exit year, credits to be earned for all years, and specific electives identified by course name.

Must meet all requirements per IEP – Each IEP – 1 point

Total points= 2 / 2

3.e. Coordinated Transition activities – The IEP must include coordinated transition activities that will reasonably enable the student to meet his/her postsecondary goals related to: Instruction, Related service(s), Community experience(s), Development of employment and post-school objectives, Acquisition of daily living skills (if appropriate) and Functional evaluation (if appropriate)

Must meet all requirements per IEP – Each IEP – 1 point

Total points= 2 / 2

3.f. Annual goals related to post school goals – The IEP must include annual IEP goal(s) related to the student's transition services needs.

Must meet all requirements per IEP – Each IEP – 1 point

Total points= 1 / 2

IEP #2 - One Academic and Functional goals are missing the connection to post-secondary goals. (0 points)

3.g. Student invited to IEP Team meeting – The student's file must include documented evidence that the student was invited to participate in his/her IEP meeting prior to the date the meeting was held.

Must meet all requirements per IEP – Each IEP – 1 point

Total points= 1 / 2

IEP #2 - Missing student invitation for the amendment. (0 points)

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3.h. Participating agency – If appropriate, the IEP must include evidence that a representative of any participating agency was invited to the IEP meeting with the prior consent of the parent or student who has reached the age of majority.

Must meet all requirements per IEP – Each IEP – 1 point

Total points= 2 / 2

3.i. All students by the age of 14 have been informed of Rights That Will Transfer at Age of Majority. Beginning no later than the first IEP to be in effect when the child turns fourteen (14), or younger, if determined appropriate by the IEP team, and updated annually thereafter; the IEP shall include a statement that the child has been informed of the child's rights under the IDEA that will transfer to the child on reaching the age of majority. (34 C.F.R. § 300.320(c); 6.31.2.11(G) (3) (c) NMAC).

Must meet all requirements per IEP – Each IEP – 1 point

Total points= 2 / 2

3.j. Special Education IEPs submitted on time for SPP 13 upload – 2 points

SPP 13 IEP file upload due date: ____

File upload date completed: ____

Total points= 0 / 0

N/A - will complete in the Spring 2022

3.k. Special Education IEPs submitted for SPP13 upload are compliant – 2 points each file

Number of compliant IEPs ____ out of ____

Total points= 0 / 0

N/A - will complete in the Spring 2022

3.1. All districts are required to administer and report **Post-School Outcomes Survey**, even if they had no high school students that exited in the reporting year. The Public Education Department, Special Education Bureau conducts an annual State-Wide Follow-up Study, as a mandated requirement of the State Performance Plan, to provide post school follow-up information to OSEP to address **SPP Indicator 14**.

PSO surveys completed and uploaded by September 30, 2021 – 1 point

Total points= 0 / 0

N/A - This requirement is only for High Schools

3. Transition Compliance

Total points= 16 / 18 Points

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4. Evaluation Compliance

The following parts of the Evaluation reviewed are in compliance

**See links to state and federal regulations for additional guidance.*

20 - 30 possible points*

**Points will be adjusted to reflect all areas reviewed..*

4.a. The school is in compliance with Indicator 11 per STARS report (60-day timeline: signed consent/date evaluation is complete) to comply with this regulation, the school shall conduct a full and individual initial evaluation, in accordance with §300.305 and §300.306, before the initial provision of special education and related services to a child with a disability. (34 C.F.R. § 300.301(a)) - **Each reporting period - 1 point**

40th YES

80th

120th

Total points= 1 / 1

Met 60 day timeline for 40th day

4.b. The Re-evaluations are current per STARS report. Schools shall reevaluate a child with a disability at least once every three (3) years, unless the parent and the district agree that a reevaluation is unnecessary. (34 C.F.R. § 300.303(b)(2)) - **Each reporting period - 2 points**

40th YES

80th

120th

Total points= 2 / 2

No Overdue Evaluations for 40th day

4.c. REED - Review of existing evaluation data. As part of an initial evaluation (if appropriate) and as part of any reevaluation under this part, the IEP Team and other qualified professionals, as appropriate, must - Review existing evaluation data on the child, including - Evaluations and information provided by the parents of the child; Current classroom-based, local, or State assessments, and classroom-based observations; and Observations by teachers and related services providers; 34 CFR 300.305 (a)(1)(i,ii,iii)

REED document - 5 points

Total points= 4 / 5

IEP #3 - REED is incomplete, missing a review of previous evaluations. Missing reason indicating what additional data is needed and why.

4.d. PWN - Prior Written Notice of intent to Evaluate/Reevaluate - Notice . The public agency must provide notice to the parents of a child with a disability, in accordance with § 300.503, that describes any evaluation procedures the agency proposes to conduct. 34 CFR 300.304(a)

Evaluation's PWN - 2 points

Total points= 2 / 2

IEP #3 - PWN notifying parents of the intent to Reevaluate is missing information on what additional data is needed. (1.5 points)

4.e. Consent for Initial Evaluation/Reevaluation with testing - Parental consent for initial evaluation. (1)(i) The public agency proposing to conduct an initial evaluation to determine if a child qualifies as a child with a disability under § 300.8 must, after providing notice consistent with §§ 300.503 and 300.504, obtain informed consent, consistent with § 300.9, from the parent of the child before conducting the evaluation. **Parental consent for reevaluations.** Must obtain informed parental consent, in accordance with § 300.300(a)(1), prior to conducting any reevaluation of a child with a disability. 34 CFR 300.300(a) & (c)(1)(i)

Evaluation's consent - 3 points

Total points= 3 / 3

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4.f. Initial Evaluation/Reevaluation Report - Initial evaluations. Each public agency must conduct a full and individual initial evaluation, in accordance with §§ 300.304 through 300.306, before the initial provision of special education and related services to a child with a disability under this part. **Reevaluations.** A public agency must ensure that a reevaluation of each child with a disability is conducted in accordance with §§ 300.304 through 300.311 - If the public agency determines that the educational or related services needs, including improved academic achievement and functional performance, of the child warrant a reevaluation; or If the child's parent or teacher requests a reevaluation. The public agency provides a copy of the evaluation report and the documentation of determination of eligibility at no cost to the parent. 34 CFR 300.301(a), 34 CFR 300.303(a)(1-2), 34 CFR 300.306(a)(2)

Evaluation's report – 3 points

Total points= 2 / 3

OT report contains incorrect student demographic data.(1 out of 1.5 points) Missing evaluation report/data from social worker. (.5 out of 1.5 points)

4.g. Eligibility Determination Team Meeting (Initial/Reevaluation) - Determination of eligibility. Upon completion of the administration of assessments and other evaluation measures, for each eligibility being considered - A group of qualified professionals and the parent of the child determines whether the child is a child with a disability, as defined in § 300.8, in accordance with paragraph (c) of this section and the educational needs of the child. In the case of a **reevaluation** of a child, whether the child continues to need special education and related services; 34 CFR 300.306(a)(1), 34 CFR 300.305 (a)(2)(iii)(B)

Complete EDT forms per evaluation – 5 points

Total points= 5 / 5

IEP #3 - EDT document is incomplete, missing Social Worker evaluation data. (4.5 points)

4.h. Initial IEPs – provision of services. Each public agency must ensure that - A meeting to develop an IEP for a child is conducted **within 30 days** of a determination that the child needs special education and related services; 34 CFR 300.323(c)(1)

Meets 30 days initial placement timeline - 2 points

Total points= 0 / 0

N/A -File reviewed included a Reevaluation

4.i. Consent for Initial Placement - Parental consent for services. A public agency that is responsible for making FAPE available to a child with a disability must obtain informed consent from the parent of the child before the initial provision of special education and related services to the child. 34 CFR 300.300 (b)(1)

Consent for initial placement - 2 points

Total points= 0 / 0

N/A -File reviewed included a Reevaluation

4. Evaluation Compliance

Total points= 17.5 / 21 Points

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Concerns from current site visit <u>11/18/21</u>	Recommendations	Action Plan (with completion dates)
2.b. IEP Compliance - PLPs— Present Levels of Performance IEP #3 - Present levels missing current evaluation summary, the information included is outdated. (1.5 points)	<p>All IEPs must include a statement of the child's present levels of academic achievement and functional performance. Including scores, data and narrative that clearly describes the area of need. Present levels must also include all related services.</p> <p>Review NMPED IEP Manual, Writing the IEP section - "Tips on Present Levels of Academic Achievement and Functional Performance" for detailed guidance.</p>	<p>Ensure all IEPs include complete and current present levels of performance.</p> <p>Review spring 2022</p>
2.c. IEP Compliance - Annual Goals IEP #3 - Missing Academic goal (1 point)	<p>The IEP must include a statement of measurable annual goals, including academic and functional and related services when appropriate. It is recommended to use present levels as the baseline to build upon when creating goals.</p>	<p>It is recommended to hold an addendum to add missing academic goal by January 21, 2022.</p> <p>Review spring 2022</p>
2.d. IEP Compliance - PTGs— Progress Towards Goals IEP #3 - Missing some PTGs. (1 point)	<p>Periodic reports on the progress the student is making toward meeting the annual goal (such as through the use of quarterly or other periodic reports, concurrent with the issuance of regular education report cards) needs to be provided to the parent. Progress towards goals should include a description and data scores.</p> <p>Refer to "IEP Manual October 2011" Technical Manual from NMPED.</p>	<p>Ensure all IEPs include measurable and descriptive academic and functional progress towards goals. Including Ancillary services.</p> <p>Review spring 2022</p>
2.f. IEP Compliance - LRE— Least Restrictive Environment All 3 IEPs - Impact statements need to be updated, some information is incorrect. (.5 points each)	<p>The LRE should reflect how the student is placed within the continuum of services; indicating the level of services and location to match the Service schedule.</p> <p>The IEP team must also provide a detailed explanation for students who will not be include in the general education setting for more than 80%.</p>	<p>Ensure all IEPs include documentation explaining their integration in the Regular Education setting.</p> <p>Review spring 2022</p>

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<p>2.g. IEP Compliance - PWN – Prior Written Notice IEP #2 & #3 - Some proposals missing information or incorrect proposal. (IEP #1 - 1.5 points, IEP #2 - 1. point)</p>	<p>PWNs <u>must</u> include all items and options the Public Agency and/or Parent/guardian proposed during the IEP meeting. Proposals must include detailed documentation that supports the proposal. This page is a summary of the discussions held during the meeting. It includes information about: (but not limited to)</p> <ul style="list-style-type: none"> -Provision of <u>services</u> and <u>setting</u> -Provision of Related Services & supports -Transition information (Transition services, goals, graduation path, outside agencies, transfer of rights) -State testing and accommodations -Behavioral supports 	<p>Ensure all IEPs include a complete and accurate Prior Written notice of all proposed actions. Proposals must include proper justification based on data that describes the reason(s) for acceptance or rejection.</p> <p><i>Review spring 2022</i></p>
<p>2.j. IEP Compliance - Parent Notification IEP #2 - Missing Parent invitation to the amendment.</p>	<p>To ensure parent participation, the school should notify parents of the meeting early enough to ensure that they will have an opportunity to attend. A copy of the notification should be included in the student's confidential file.</p>	<p>Ensure a parent notification is given to parents with ample time to make arrangements to attend the meeting.</p> <p><i>Review spring 2022</i></p>
<p>3.f. Transition Plans – Annual Goals related to post school goals IEP #2 - One Academic and Functional goals are missing the connection to post-secondary goals. (0 points)</p>	<p>Transition IEPs must include annual goals related to transition service needs. With a minimum of one academic and one career/functional. Annual goals should address what needs to be achieved this year to help the student move towards their measurable postsecondary goal. Goal must be outcome oriented.</p>	<p>Train staff to ensure this section is completed accurately.</p> <p><i>Review spring 2022</i></p>
<p>3.g. Transition Plans – Student invited IEP #2 - Missing student invitation for the amendment. (0 points)</p>	<p>When holding a transition IEP, Parents <u>and</u> students must be invited to the meeting. Sample invitations can also be found at the Sp. Ed. website for charter schools, under APS documents.</p>	<p>Ensure a transition meeting notification is given to parents & students with ample time to make arrangements to attend the meeting.</p> <p><i>Review spring 2022</i></p>

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<p>4.c. Evaluation – REED – Review of Existing Evaluation Data</p> <p><i>IEP #3 - REED is incomplete, missing a review of previous evaluations. Missing reason indicating what additional data is needed and why.</i></p>	<p>As part of ... any reevaluation under this part, the IEP Team and other qualified professionals, as appropriate, must Review existing evaluation data on the child, including - Evaluations and information provided by the parents of the child; current classroom-based, local, or state assessments, and classroom-based observations; and observations by teachers and related services providers; to determine if additional data is needed.</p>	<p>For upcoming reevaluations, ensure the REED includes all the necessary data that will enable the Eligibility Determination Team to make the appropriate decisions as part of the Reevaluation process.</p> <p><i>Review spring 2022</i></p>
<p>4.d. Evaluation-PWN – Prior Written Notice of intent to Evaluate/Reevaluate</p> <p><i>IEP #3 - PWN notifying parents of the intent to Reevaluate is missing information on what additional data is needed. (1.5 points)</i></p>	<p>The public agency must provide notice to the parents of a child with a disability, in accordance with § 300.503, that describes any evaluation procedures the agency proposes to conduct.</p>	<p>Ensure PWN is provided to parents after the Evaluation team has determined if additional data were needed or not and prior to conducting any evaluation.</p> <p><i>Review spring 2022</i></p>
<p>4.f. Evaluation – Reevaluation Report</p> <p><i>OT report contains incorrect student demographic data.(1 out of 1.5 points) Missing evaluation report/data from social worker. (.5 out of 1.5 points)</i></p>	<p>As part of the evaluation process... The public agency provides a copy of the evaluation report and the documentation of determination of eligibility at no cost to the parent. It is the responsibility of the public agency to ensure documentation is accurate.</p>	<p>Review student's evaluation reports to ensure they are accurate. Also, ensure that the team is able to review all pertinent information in order to make appropriate eligibility determination decisions.</p> <p><i>Review spring 2022</i></p>
<p>4.g. Evaluation – EDT – Eligibility Determination Team</p> <p><i>IEP #3 - EDT document is incomplete, missing Social Worker evaluation data. (4.5 points)</i></p>	<p>Upon completion of the administration of assessments and other evaluation measures, for each eligibility being considered - A group of qualified professionals and the parent of the child determines... In the case of a reevaluation of a child, whether the child continues to need special education and related services. The team must ensure evaluation procedures meet NMTEAM 2017 requirements.</p>	<p>Ensure EDTs/METs include all the pertinent information being considered when making eligibility determination decisions.</p> <p><i>Review spring 2022</i></p>

* **Highlighted** items have not been completed. Follow-up will be conducted in the **Spring 2022**.

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Academic Performance	
	Mission Specific Goals <ul style="list-style-type: none"> Using the Google form, please upload your Mission-specific goals data for evaluation. The beginning of the form includes a spreadsheet template for your mission-specific goals sheets. Mission-Specific Goals Form - https://forms.gle/KuJZkHKKNUFCPtr5A If you have any issues with uploading to the Google Drive, please contact Dr. Eleanor Andrews at eleonor.andrews@aps.edu.
	2020-21 Evidence of Knowledge Gained <ol style="list-style-type: none"> Show Data that you have analyzed using Beginning of Year Assessments Compared to Middle of Year Assessments What changes have you implemented in response to that data
	20% Set Aside from Stimulus Funds for Learning Loss <ol style="list-style-type: none"> What are your plans to use the required 20% of stimulus funds to address learning loss? What evidence-based interventions are using for students' social, emotional, and academic needs and address the disproportionate impact of COVID-19 on underrepresented student groups.
	Staff and Student Support <ol style="list-style-type: none"> How has social emotional support of staff and students evolved over the this year?
	Strategic Planning (90-Day Plan in New Mexico DASH – Spring) <ol style="list-style-type: none"> Provide highlights of your 90-day plans How has the focus, on changing adult behavior for improvement in academic achievement, impacted your school? How is this related to your strategic plan and mission?
Educational Plan	
	Mission of the School <ol style="list-style-type: none"> How have you seen your mission evolve over the past 3 years? What strategic changes will you make for next school year (2022-23)?
	English Learners <ol style="list-style-type: none"> How many TESOL endorsed teachers do you have to support English Learners? When you analyze student achievement data of English Learners what have you found? What changes do you plan to make to
Governing Council - For the following items please provide the information in the Google Document, located on the Google Drive titled "Governing Council Information."	
	Training <ul style="list-style-type: none"> Document Training for Governing Council and Include Plan for Training if all training is not completed
	Discrimination Policy

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	<ul style="list-style-type: none"> Upload a link to your discrimination/discipline policy and ensure that the policy is updated to prohibit discrimination/discipline based on hair
Employees	
	Licensure <ul style="list-style-type: none"> Will be measured through STARS Report
	Employee Rights <ul style="list-style-type: none"> Provide a link to your employee handbook.
	Background Checks <ul style="list-style-type: none"> Provide your Background Check Policy
Operations	
	Lottery Processes Provide links/documents of any marketing material used for recruiting, any marketing videos used for recruiting, lottery application, and school enrollment.
	Facilities <ul style="list-style-type: none"> Provide an update on your facility. (ex. Renovating an area, upgrades, improvements, or expansion)
	Safe School Plan <ul style="list-style-type: none"> Will be measured as schools turn in their site safety plan on December 4.
	Transparency <ul style="list-style-type: none"> Provide a link to the sunshine portal on your website. Provide a link to the 2020-21 performance framework on your website.
	Education Technology Plan <ul style="list-style-type: none"> Describe your education technology plan to support student learning. How might you use technology in the future for hybrid learning.

	Meets
	Working to Meet
	Does Not Meet

Compliance Improvements from Fall Semester

Other Notes

Sp. Ed. CAP

Financial NUP

***No Attendance Plan**

90-day Plan NOT Complete - 3/23 – Suspension of Title I RFR's

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School Year 2018-19 <i>Baseline Data</i>	School Year 2019-20 <i>No Assessment Data due to COVID-19</i>	School Year 2020-21	School Year 2021-22	Performance Measures	School Year 2022-23	School Year 2023-24	School Year 2024-25	School Year 2025-26
8.5%		<i>Strategic Planning School Refocus/Turnaround</i>			<i>Implementation of Strategic Plan and School Turnaround</i>			
7.0%				Reading	13%	18%	23%	28%
17.4%				Mathematics	10%	15%	20%	25%
				Science	22%	27%	32%	37%

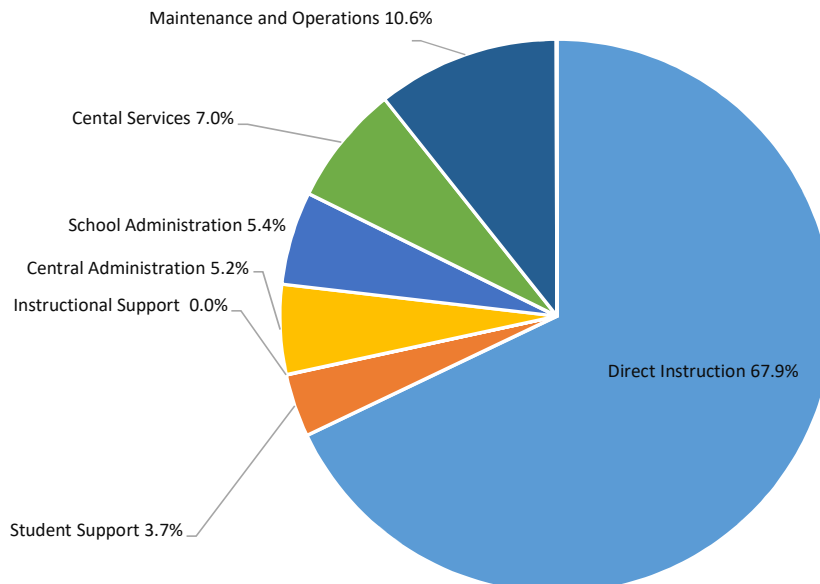
Domains of Rapid Improvement from Center for School Turnaround	Month 1 (January)	Month 2 (March)	Month 3 (April)	Month 3 (May)
Turnaround Leadership <ul style="list-style-type: none"> Prioritize improvement and communicate its urgency Monitor short- & long-term goals Customize and target support to meet needs 	Progress is adequate but there are concerns	Progress is adequate but there are concerns	Progress is inadequate and there are concerns	Progress is inadequate and there are concerns
Talent Development <ul style="list-style-type: none"> Recruit, develop retain and sustain talent. Target professional learning opportunities Set clear performance expectations 	Progress is adequate but there are concerns	Progress is adequate but there are concerns	Progress is adequate but there are concerns	Progress is adequate but there are concerns
Instructional Transformation <ul style="list-style-type: none"> Diagnose and respond to student learning needs Provide rigorous evidence-based instruction Remove barriers and provide opportunities 	Progress is adequate but there are concerns	Progress is adequate but there are concerns	Progress is adequate but there are concerns	Progress is adequate but there are concerns
Culture Shift <ul style="list-style-type: none"> Build a culture focused on student learning and effort Solicit and act upon stakeholder input Engagement students and families in pursuing education goals. Enrollment 	Progress is inadequate and there are concerns	Progress is inadequate and there are concerns	Progress is inadequate and there are concerns	Progress is inadequate and there are concerns
Legend	Progress is adequate and there are no concerns	Progress is adequate but there are concerns	Progress is inadequate and there are concerns	

Meets
Working to meet
Does not meet

Operational Expenditures by Function

Function		APS Charter School Median %	Christine Duncan %	Amount	Compliance Criteria
1000	Direct Instruction (Teachers, EAs, instructional coaches, etc.)	57%	67.9%	\$2,547,212.85	Meets =56% or above Working to Meet =51 to 56% Does Not Meet =Below 51%
2100	Student Support (Social workers, counseling, ancillary services, etc.)	9%	3.7%	\$138,212.03	Meets =12% or above Working to Meet =9 to 12% Does Not Meet =Below 9%
2200	Instructional Support (Library/Media services, instruction-related technology, academic student assessment, etc.)	0%	0.0%	\$657.04	Meets =0 to 1% Working to Meet =1 to 3% Does Not Meet =Above 3%
2300	Central Administration (Governance Council, executive administration, community relations, etc.)	7%	5.2%	\$196,296.37	Meets =0 to 8% Working to Meet =8 to 11% Does Not Meet =Above 11%
2400	School Administration (School Administrator, etc.)	5%	5.4%	\$204,267.37	Meets =0 to 6% Working to Meet =6 to 9% Does Not Meet =Above 9%
2500	Central Services (Business Manager, human resources, printing, technology services, etc.)	7%	7.0%	\$263,381.34	Meets =0 to 7% Working to Meet 7 to 10% Does Not Meet =Above 10%
2600	Maintenance and Operations (M&O of buildings, upkeep of grounds and vehicles, security, safety, etc.)	9%	10.6%	\$398,972.98	Meets =0 to 10% Working to Meet =10 to 13% Does Not Meet =Above 13%
	Other (Construction services, lease to purchase)	0%	0.0%	\$1,748.96	Meets =0 to 1% Working to Meet =1 to 4% Does Not Meet =Above 4%
	GRAND TOTAL			\$3,750,748.94	
1000, 2100, 2200, 2400	Student Success (Direct Instruction, Student Support, Instructional Support, and School Administration)	76%	77%	\$2,890,349.29	Meets =76% or above Working to Meet =72 to 76% Does not Meet = Below 72%

Christine Duncan Heritage Academy
Operational Expenditures FY 2020-21

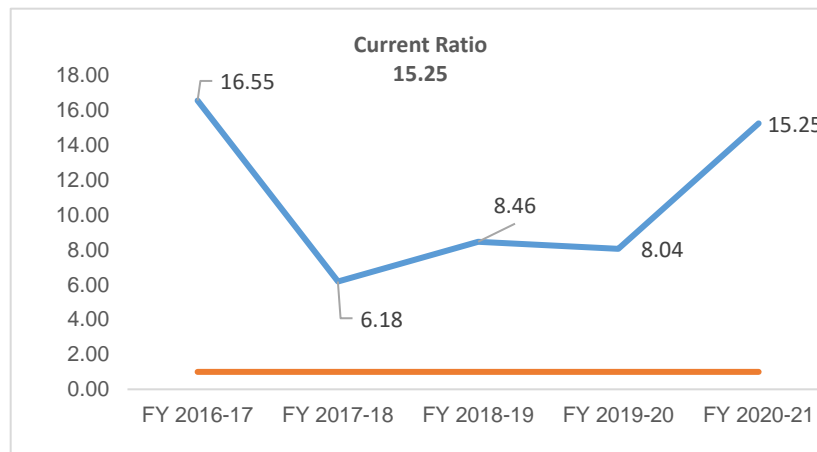
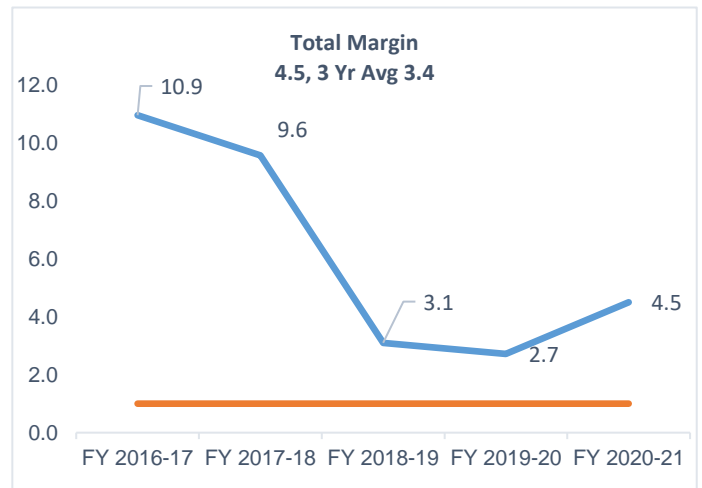
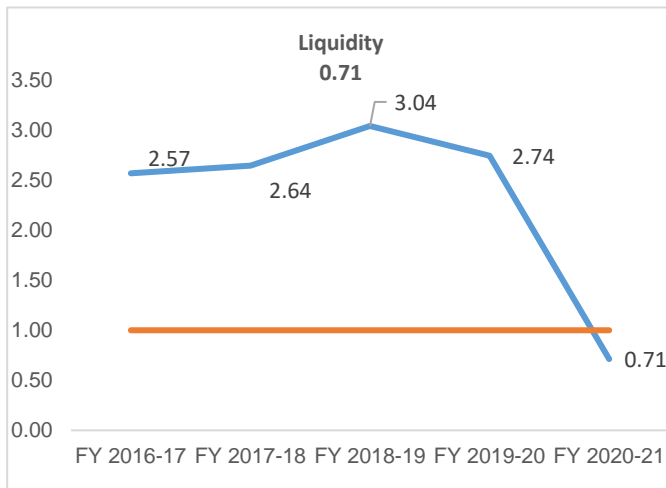


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2021-22 Spring Site Visit Report

Charter School Name: Christine Duncan
Date of Site Visit: April 27, 2022

Financial Performance

- Current Ratios - Measures the school's ability to pay its debt as they come due. Ratio should be greater than 1:1 and not less than or equal to 0.9
- Liquidity - Measures the school's ability to pay its obligations over the next 12 months. School should have at least 1 month and not less than .5 months
- Total Margin - Measures the deficit or surplus a school yields out of its total revenues. Three year should be positive and most recent year is positive
- Operational Expense percentages



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Financial Audit

	Federal Funds – Federal Fund Report (Life To Date) <ul style="list-style-type: none"> • Upload detailed list of expenditures for funds 24301, 24308, and 24330 <ul style="list-style-type: none"> ○ Have RfR's for each of the funds listed above been submitted - Yes ○ What is % expended life to date 24301 97%, 24308 24%, 24330 0% ○ What has been purchased with funding List provided ○ What is the percentage of 20% evidence based funding spent life to date 0%
	Vendors <ul style="list-style-type: none"> • Reviewed the following three vendors: InAccord, Bilingual Multicultural, and Archway, NM Book Depository <ul style="list-style-type: none"> ○ W9 for each vendor selected – Yes ○ Contract and/or quotes received – Yes ○ Do not currently have a Vendor Conflict of Interest form. Will be adopting APS vendor conflict of interest form and implementing a policy.
	Follow-up items from Fall 2021-22 site visit if necessary – no follow-up required from Fall site visit <ul style="list-style-type: none"> • Bank Reconciliation • Cash Balances • Payroll Reports • Cash Receipts

Financial Compliance

	Audit Findings <ul style="list-style-type: none"> • Review current approved Correction Action Plan <ul style="list-style-type: none"> ○ Is number of audit finding 2 or less – Yes, 6 audit findings ○ Have repeat audit findings been cleared from previous year - No ○ Are there any significant deficiencies or material weakness audit findings – Yes 1 Significant Deficiency
	Internal Control Policies and Procedures <ul style="list-style-type: none"> • Review Internal Control Policies and Procedures <ul style="list-style-type: none"> ○ Have revisions been made as addressed in most current CAP – ○ If so have revised Internal Control policies and procedures been uploaded ○ If there have been no revisions no action is necessary.
	Chief Procurement Officer Compliance <ul style="list-style-type: none"> • Jesus Moncada, license expires October 21, 2023

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2021-22 Spring Site Visit Report

	<ul style="list-style-type: none"> ○ Is CPO registered with NM General Services Department – Yes
	Business Official License <ul style="list-style-type: none"> • Bryan Runyan, license expires June 30, 2030
	Audit and Finance Committee <ul style="list-style-type: none"> • Audit committee – two members of GC, BMaes, BMedina, one parent, MGreiving, one volunteer with financial expertise, EEsquivel • Finance committee – at least two members of the GC BMaes, BMedina

	Meets
	Working to Meet
	Does Not Meet

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Special Education Review

0-59% - Does not Meet

60-79% - Working to Meet

80-100% - Meets

1. Processes and Accountability	Total points= 20.0 / 20.0 = 100%
2. IEP Compliance	Total points= 42.5 / 49.0 = 87%
3. Transition Compliance	Total points= 17.0 / 20.0 = 85%
4. Evaluation Compliance	Total points= 20.5 / 25.0 = 82%

Follow-up to previous site visit from Fall 2021		
Site visit - <u>11/18/21</u>	Recommendations	Evidence of Improvement During Current visit
Student #3 Concerns were identified with: -Academic goals	It is recommended to hold an addendum to add missing academic goal by <u>January 21, 2022.</u> <i>Review spring 2022</i>	Christine Duncan completed an amendment IEP on 12/9/21. <u>No additional follow-up.</u>

* **Highlighted** items have not been completed. Follow-up will be conducted in the **fall 2022.**

Current site visit - Spring 2022	
Reviewer: Patricia Espinoza	Date: 3/4/22
Grades: PK- 8th	Total Enrollment: 301
Sp. Ed. Providers: 4-SE Teachers, 1-Sp. Ed. Director, 1-Social Worker, 3-SE E.A.s	SWD: 64 GI: 1
Contracted: OT, SLP, Diagnostician	
1. Processes and Accountability <i>*See links to state and federal regulations for additional guidance.</i>	
20 points	
1.a. The school has Special Education Policies and procedures that address implementation of IDEA and New Mexico Special Education Rules - Each New Mexico public agency, within the scope of its authority, shall develop and implement appropriate policies, procedures, programs and services to ensure that all children with disabilities who reside within the agency's educational jurisdiction, ... are identified and evaluation and have access to a free appropriate public education (FAPE) in compliance with all applicable requirements of state and federal laws and regulations. If the public charter school is an LEA, that charter school is responsible for ensuring that the requirements are met 6.31.2.9(A), 6.31.2.11(I)(3) The school has a policy that states their provision of a free appropriate public education for all students with disabilities - 2 points	
Total points= 2 / 2	

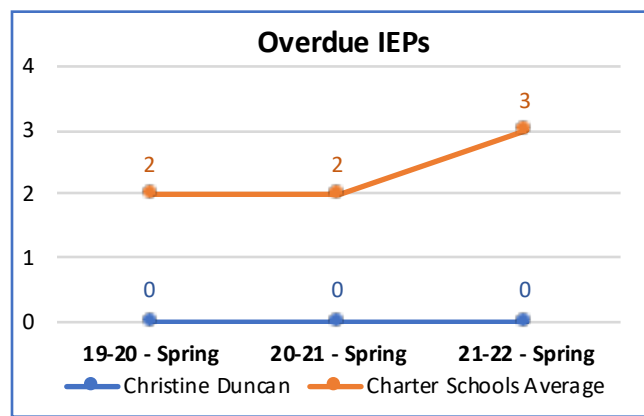
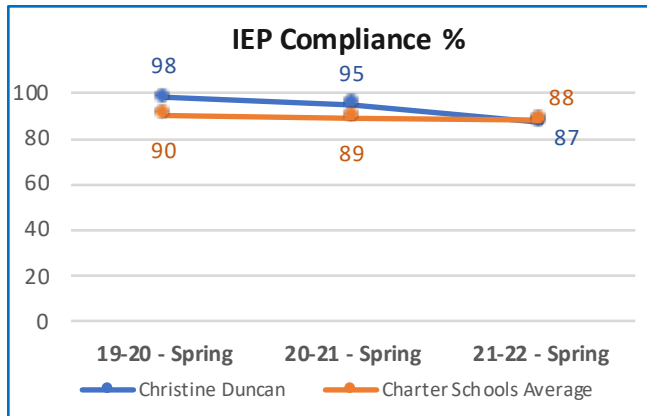
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1.b. The school has a written process that documents how they complete annual IEPs – 2 points <div style="text-align: right;">Total points= 2 / 2</div>
1.c. The school has a written process that documents how they complete Tri-annual Re-evaluations. – 2 points <div style="text-align: right;">Total points= 2 / 2</div>
1.d. The school has an updated roster for Students with disabilities. Including: name, state ID, grade, Eligibility(ies), last IEP date and last Evaluation date – 3 points <div style="text-align: right;">Total points= 3 / 3</div>
1.e. The School has Discipline plan that outlines implementation of school wide discipline policy for Students with Disabilities. Discipline policy includes specific provisions for students with disabilities and plan for the school to utilize IEP in discipline of students with disabilities – 3 points <div style="text-align: right;">Total points= 3 / 3</div>
1.f. School has a plan for the provision of an Alternative Education Setting (AES) and a written manifestation process. A removal of a child with a disability from the child's current educational placement is a change of placement if: The removal is for more than 10 school days in a row; or The child has been subjected to a series of removals that constitute a pattern (34 CFR §300.536) – 3 points <div style="text-align: right;">Total points= 3 / 3</div>
1.g. The school has a written document explaining their continuum of services. The school shall ensure that a continuum of alternative placements is available to meet the needs of children with disabilities for special education and related services. 34 C.F.R. 300.115(a) – 3 points <div style="text-align: right;">Total points= 3 / 3</div>
1.h. Special Education Coordinator Training Attendance – APS sponsored – Each item - .25 points Sep. 2021 <u>YES</u> Nov. 2021 <u>YES</u> Jan. 2022 <u>YES</u> Mar. 2022 <u>YES</u> <div style="text-align: right;">Total points= 1 / 1</div>
1.i. Special education caseloads are balanced and with a licensed special education teacher per STARS report. Caseload waivers are appropriate for school size – Each reporting period - .33 points 40th <u>YES</u> 80th <u>YES</u> 120th <u>YES</u> <div style="text-align: right;">Total points= 1 / 1</div>
1. Processes and Accountability <div style="text-align: right;">Total 20.0 /20.0 points</div>

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Christine Duncan's Heritage Academy
Spring Site Visits 2021-22



2. IEP Compliance

The following parts of the IEP reviewed are in compliance.

*See links to state and federal regulations for additional guidance.

32 - 50 possible points*

Three IEPs reviewed

*Points will be adjusted to reflect all areas reviewed.

2.a. The IEPs reviewed are current per STARS report. An IEP Team meeting must be held to review the child's IEP periodically, but not less than annually, to determine whether the annual goals for the child are being achieved. (34 C.F.R. § 300.324(b)(1)(i)). - Each reporting period - 2 points, 1-2-overdue IEPs= 1 point; 3+ overdue IEPs= 0

40th YES 80th YES 120th YES

Total points= 6 / 6

No overdue IEPs for the 40th, 80th or 120th

2.b. PLPs-Present levels of performance- Includes scores, data and narratives. Must include all related services. The IEP shall include a statement of the child's present levels of academic achievement and functional performance. 34 CFR 300.320(a)(1) -

Must meet all requirements per IEP - Each IEP - 2 points

Total points= 6 / 6

IEP #3 - Missing a summary of current evaluation. Missing documentation on addressing social/emotional/behavioral needs. (1.5 points)

2.c. Goals- Must be measurable. Must include all related services. An IEP shall include both academic and functional goals. The IEP shall include a statement of measurable annual goals, including academic and functional goals. 34 C.F.R. § 300.320(a)(3) and 71 Fed. Reg. 46662 (August 14, 2006) -

Must meet all requirements per IEP - Each IEP - 2 points

Total points= 5 / 6

IEP #1 - Missing functional goal (1.5 points), IEP #3 - Reading and Writing goals missing proficiency level (1.5 points)

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<p>2.d. PTGs-Goals must include measurable progress towards goals. The IEP shall include a description of how the child's progress toward meeting the annual goals will be measured; and when periodic reports on the progress the child is making toward meeting the annual goals (such as through the use of quarterly or other periodic reports, concurrent with the issuance of report cards) will be provided to the parent. (34 C.F.R. § 300.320(a)(2)(ii))</p> <p>Must meet all requirements per IEP – Each IEP – 2 points</p> <p>IEP #1 - Missing PTGs (0 points), IEP #2 - Missing PTGs for Trimester 1 (1 point), IEP #3 - N/A - Initial IEP.</p>	<p>Total points= 1 / 4</p>
<p>2.e. Service Schedule- Accurately reflects beginning date, frequency, duration and location of services, including related services. The IEP shall include a statement of the special education and related services to be provided to the child, or on behalf of the child. (34 C.F.R. § 300.39(b)(3))</p> <p>Must meet all requirements per IEP – Each IEP – 2 points</p>	<p>Total points= 6 / 6</p>
<p>2.f. LRE- data based and reflects how the student is placed within the continuum of service. The Least Restrictive Environment section of the IEP provides the necessary documentation that the IEP Team determined placement in the least restrictive environment according to the IDEA requirements and this procedural directive. (20 U.S.C. §1412(a)(5)(A); also, 34 C.F.R. §300.114(a)(2))</p> <p>Must meet all requirements per IEP – Each IEP – 1 point</p>	<p>Total points= 3 / 3</p>
<p>2.g. PWN- Prior Written Notice - Records all proposals by school and parents- documents what was discussed including the continuum of services. Special education and related services are included in a child's FAPE; and therefore, a proposal to revise a child's IEP, which typically involves a change to the type, amount, or location of the special education and related services being provided to a child, would trigger requirements to provide prior written notice. (34 CFR § 300.503)</p> <p>Must meet all requirements per IEP – Each IEP – 2 points</p>	<p>Total points= 6 / 6</p>
<p>2.h. IEP Team Participants-The IEP Team Meeting Participants signature page of the IEP shall reflect the members of the IEP Team who were present and participated in the IEP Team meeting, and shall further provide the necessary documentation that the IEP Team meeting was duly constituted. The names of the IEP Team meeting participants shall be typed as well as their participation reflected by their signature. (34 C.F.R. § 300.321(a))</p> <p>Must meet all requirements per IEP – Each IEP – 1 point</p>	<p>Total points= 3 / 3</p>
<p>2.i. Parent Involvement: Schools shall afford parents of a child with a disability an opportunity to participate in meetings with respect to the identification, evaluation, and educational placement of the child and the provision of FAPE to the child. (34 C.F.R. § 300.501(b)(1))</p> <p>Must meet all requirements per IEP – Each IEP – 1 point</p>	<p>Total points= 3 / 3</p>
<p>2.j. Parent notification: The steps Schools shall take to ensure parent participation in EDT and/or IEP Team meetings shall include notifying parents of the meeting early enough to ensure that they will have an opportunity to attend and scheduling the meeting at a mutually agreed on time and place. (34 C.F.R. § 300.322(a))</p> <p>Must meet all requirements per IEP – Each IEP – 1 points</p>	<p>Total points= 3 / 3</p>

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The following items will be reviewed only for IEPs that include data indicating these items should be addressed by the IEP team.

Total points will be adjusted accordingly.

2.k. Testing Accommodations – A statement of accommodations necessary to measure the academic achievement and functional performance of the child on state and districtwide assessment. 34 CFR 300.320(a)(6)(i)

Must meet all requirements per IEP – Each IEP – 1 point

Total points= 1 / 3

IEP #2 & #3 - Accommodations included are not allowed (0 points each)

2.l. FBA/BIP if appropriate- The IEP team must, in the case of a child whose behavior impedes the child's learning or that of others, consider the use of positive behavioral interventions and supports, and other strategies, to address that behavior. Including conducting Functional Behavior Assessments (FBAs) and integration of Behavioral Intervention Plans (BIPs) into the IEPs. 34 CFR 300.324(a)(2)(i), (6.31.2.11(F) (1) NMAC)

N/A

Alternate Assessment – If the IEP team determines that a child must take an alternate assessment, the IEP must contain a statement of why the child cannot participate in the regular assessment and why the particular alternate assessment selected is appropriate for the child. 34 CFR 300.320(a)(6)(ii). Alternate Assessment must be included in the IEP.

N/A

ESY - The school has ESY eligibility data recorded for every student receiving Extended School Year services.

ESY services may be provided only if a child's IEP Team determines, on an individual basis, that the services are necessary for the provision of FAPE to the child. (34 C.F.R. § 300.106(a)(1-2))

N/A

Each item per IEP – 1 point

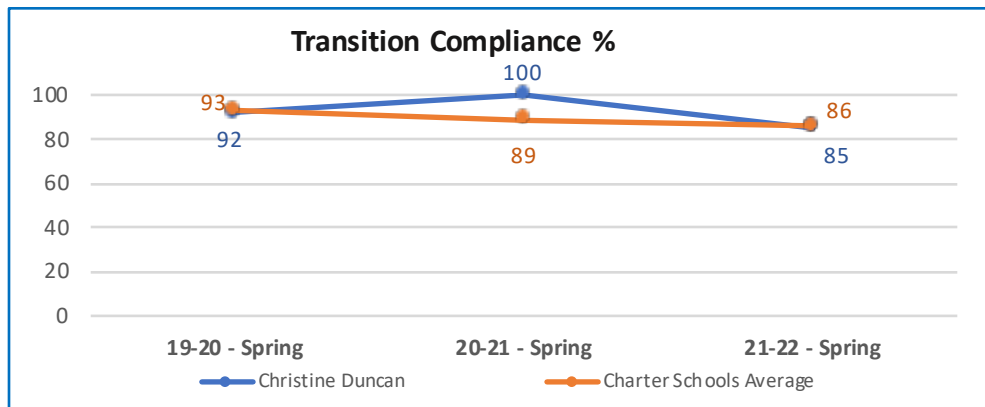
Total points= /

2. IEP Compliance

Total points= 42.5 / 49 Points

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3. Transition Compliance

The transition plans for students with disabilities (age 14+) are in compliance with Indicator 13.

**See links to state and federal regulations for additional guidance.*

10 - 30 possible points*

Two Transition IEPs reviewed.

**Points will be adjusted to reflect all areas reviewed.*

3.a. Measurable post-secondary goals: The IEP must include appropriate measurable post-secondary goals based upon age-appropriate transition assessments related to Training, Education, Employment, and **where appropriate**, independent living skills. (34 C.F.R. § 300.320(b) (1); 6.31.2.11(G) (3) (a) NMAC

Must meet all requirements per IEP – Each IEP – 1 point

Total points= 2 / 2

3.b. Post-secondary goals updated annually – IEP must be current and contain Measurable post-secondary goals. Goals should be reviewed/updated annually.

Must meet all requirements per IEP – Each IEP – 1 point

Total points= 2 / 2

3.c. Transition assessment – The IEP must include evidence that the measurable post-secondary goals were based on age-appropriate transition assessment(s). Age-appropriate transition assessments from multiple sources providing information on strengths, needs, preferences, and interests.

Must meet all requirements per IEP – Each IEP – 1 point

Total points= 2 / 2

3.d. Course of study – The IEP must include a course of study that will reasonably enable the student to meet his or her post-secondary goals. Included in the course of study: A multi-year description, current school year through anticipated exit year, credits to be earned for all years, and specific electives identified by course name.

Must meet all requirements per IEP – Each IEP – 1 point

Total points= 2 / 2

3.e. Coordinated Transition activities – The IEP must include coordinated transition activities that will reasonably enable the student to meet his/her postsecondary goals related to: Instruction, Related service(s), Community experience(s), Development of employment and post-school objectives, Acquisition of daily living skills (if appropriate) and Functional evaluation (if appropriate)

Must meet all requirements per IEP – Each IEP – 1 point

Total points= 2 / 2

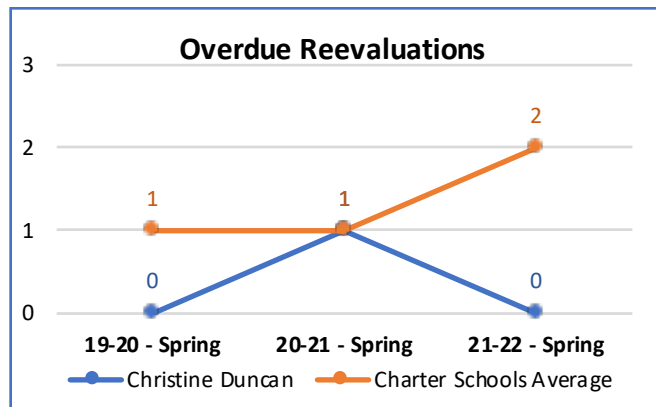
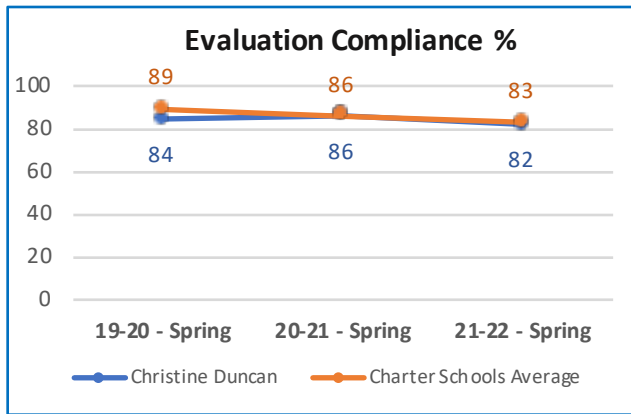
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3.f. Annual goals related to post school goals – The IEP must include annual IEP goal(s) related to the student's transition services needs. Must meet all requirements per IEP – Each IEP – 1 point IEP #1 & #2 - Some or all academic and functional goals are missing the connection to post-secondary goals.		Total points= 0 / 2
3.g. Student invited to IEP Team meeting – The student's file must include documented evidence that the student was invited to participate in his/her IEP meeting prior to the date the meeting was held. Must meet all requirements per IEP – Each IEP – 1 point		Total points= 2 / 2
3.h. Participating agency – If appropriate, the IEP must include evidence that a representative of any participating agency was invited to the IEP meeting with the prior consent of the parent or student who has reached the age of majority. Must meet all requirements per IEP – Each IEP – 1 point		Total points= 2 / 2
3.i. All students by the age of 14 have been informed of Rights That Will Transfer at Age of Majority. Beginning no later than the first IEP to be in effect when the child turns fourteen (14), or younger, if determined appropriate by the IEP team, and updated annually thereafter; the IEP shall include a statement that the child has been informed of the child's rights under the IDEA that will transfer to the child on reaching the age of majority. (34 C.F.R. § 300.320(c); 6.31.2.11(G) (3) (c) NMAC). Must meet all requirements per IEP – Each IEP – 1 point IEP #2 - Annual notification of the transfer of rights date was not updated.		Total points= 1 / 2
3.j. IEPs submitted for SPP13 upload are compliant – 1 point each file Number of compliant IEPs <u>1</u> out of <u>1</u>		Total points= 1 / 1
3.k. Compliant IEPs submitted by APS internal deadline for SPP 13 upload – 1 point each file SPP 13 IEP file upload due date: <u>1/14/22</u> File upload date completed: <u>12/6/21</u> Number of compliant IEPs submitted by the deadline <u>1</u> out of <u>1</u>		Total points= 1 / 1
3.1. All districts are required to administer and report Post-School Outcomes Survey , even if they had no high school students that exited in the reporting year. The Public Education Department, Special Education Bureau conducts an annual State-Wide Follow-up Study, as a mandated requirement of the State Performance Plan, to provide post school follow-up information to OSEP to address SPP Indicator 14 . PSO surveys completed and uploaded by September 30, 2021 – 1 point N/A - Requirement only for High Schools.		Total points= /
3. Transition Compliance		Total points= 17 / 20 Points

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4. Evaluation Compliance

The following parts of the Evaluation reviewed are in compliance

*See links to state and federal regulations for additional guidance.

20 - 30 possible points*

One Evaluation reviewed

*Points will be adjusted to reflect all areas reviewed.

4.a. The school is in compliance with Indicator 11 per STARS report (60-day timeline: signed consent/date evaluation is complete) to comply with this regulation, the school shall conduct a full and individual initial evaluation, in accordance with §300.305 and §300.306, before the initial provision of special education and related services to a child with a disability. (34 C.F.R. § 300.301(a)) - **Each reporting period - 1 point**

40th YES

80th N/A

120th YES

Total points= 2 / 2

MET requirement for 40th & 120th. No initial Evaluations for 80th.

4.b. The Re-evaluations are current per STARS report. Schools shall reevaluate a child with a disability at least once every three (3) years, unless the parent and the district agree that a reevaluation is unnecessary. (34 C.F.R. § 300.303(b)(2)) - **Each reporting period - 2 points**

40th YES

80th YES

120th YES

Total points= 6 / 6

No Overdue Reevaluations for 40th, 80th, & 120th

4.c. REED - Review of existing evaluation data. As part of an initial evaluation (if appropriate) and as part of any reevaluation under this part, the IEP Team and other qualified professionals, as appropriate, must - Review existing evaluation data on the child, including - Evaluations and information provided by the parents of the child; Current classroom-based, local, or State assessments, and classroom-based observations; and Observations by teachers and related services providers; 34 CFR 300.305 (a)(1)(i,ii,iii)

REED document - 5 points

Total points= /

N/A - Initial evaluation

4.d. PWN - Prior Written Notice of intent to Evaluate/Reevaluate - Notice. The public agency must provide notice to the parents of a child with a disability, in accordance with § 300.503, that describes any evaluation procedures the agency proposes to conduct. 34 CFR 300.304(a)

Evaluation's PWN - 2 points

Total points= 0 / 2

IEP #3 - Missing notice of the intent to evaluate

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4.e. Consent for Initial Evaluation/Reevaluation with testing - Parental consent for initial evaluation. (1)(i) The public agency proposing to conduct an initial evaluation to determine if a child qualifies as a child with a disability under § 300.8 must, after providing notice consistent with §§ 300.503 and 300.504, obtain informed consent, consistent with § 300.9, from the parent of the child before conducting the evaluation. **Parental consent for reevaluations.** Must obtain informed parental consent, in accordance with § 300.300(a)(1), prior to conducting any reevaluation of a child with a disability. 34 CFR 300.300(a) & (c)(1)(i)

Evaluation's consent – 3 points

Total points= 3 / 3

4.f. Initial Evaluation/Reevaluation Report - Initial evaluations. Each public agency must conduct a full and individual initial evaluation, in accordance with §§ 300.304 through 300.306, before the initial provision of special education and related services to a child with a disability under this part. **Reevaluations.** A public agency must ensure that a reevaluation of each child with a disability is conducted in accordance with §§ 300.304 through 300.311 - If the public agency determines that the educational or related services needs, including improved academic achievement and functional performance, of the child warrant a reevaluation; or If the child's parent or teacher requests a reevaluation. The public agency provides a copy of the evaluation report and the documentation of determination of eligibility at no cost to the parent. 34 CFR 300.301(a), 34 CFR 300.303(a)(1-2), 34 CFR 300.306(a)(2)

Evaluation's report – 3 points

Total points= 3 / 3

4.g. Eligibility Determination Team Meeting (Initial/Reevaluation) - Determination of eligibility. Upon completion of the administration of assessments and other evaluation measures, for each eligibility being considered - A group of qualified professionals and the parent of the child determines whether the child is a child with a disability, as defined in § 300.8, in accordance with paragraph (c) of this section and the educational needs of the child. In the case of a **reevaluation** of a child, whether the child continues to need special education and related services; 34 CFR 300.306(a)(1), 34 CFR 300.305 (a)(2)(iii)(B)

Complete EDT forms per evaluation – 5 points

Total points= 5 / 5

IEP #3 - EDT/MET document is incomplete, the team included limited information that supports second Eligibility (4.5 points)

4.h. Initial IEPs – provision of services. Each public agency must ensure that - A meeting to develop an IEP for a child is conducted **within 30 days** of a determination that the child needs special education and related services; 34 CFR 300.323(c)(1)

Meets 30 days initial placement timeline - 2 points

Total points= 2 / 2

4.i. Consent for Initial Placement - Parental consent for services. A public agency that is responsible for making FAPE available to a child with a disability must obtain informed consent from the parent of the child before the initial provision of special education and related services to the child. 34 CFR 300.300 (b)(1)

Consent for initial placement - 2 points

Total points= 0 / 2

IEP #3 - Consent for initial special education placement was obtained 3 months after placement.

4. Evaluation Compliance

Total points= 20.5 / 25 Points

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Concerns from current site visit <u>3/4/22</u>	Recommendations	Action Plan (with completion dates)
2.b. IEP Compliance - PLPs— Present Levels of Performance IEP #3 - Missing a summary of current evaluation. Missing documentation on addressing social/emotional/behavioral needs. (1.5 points)	All IEPs must include a statement of the child's present levels of academic achievement and functional performance . Including scores, data and narrative that clearly describes the area of need. Present levels must also include all related services.	Ensure all IEPs include complete present levels of performance. Review fall 2022
2.c. IEP Compliance - Annual Goals IEP #1 - Missing functional goal (1.5 points), IEP #3 - Reading and Writing goals missing proficiency level (1.5 points)	The IEP must include a statement of measurable annual goals, including academic and functional and related services when appropriate. It is recommended to use present levels as the baseline to build upon when creating goals.	It is recommended to hold an addendum to add missing functional goal by 4/29/22 . Christine Duncan conducted an amendment on 4/7/22 to address the recommendations. No Additional Follow-up
2.d. IEP Compliance - PTGs— Progress Towards Goals IEP #1 - Missing PTGs (0 points), IEP #2 - Missing PTGs for Trimester 1 (1 point), IEP #3 - N/A - Initial IEP.	Periodic reports on the progress the student is making toward meeting the annual goal (such as through the use of quarterly or other periodic reports, concurrent with the issuance of regular education report cards) needs to be provided to the parent. Progress towards goals should include a description and data scores. Refer to "IEP Manual October 2011" Technical Manual from NMPED.	Ensure all IEPs include measurable and descriptive academic and functional progress towards goals. Including Ancillary services. Review fall 2022
2.k. IEP Compliance – Testing Accommodations IEP #2 & #3 - Accommodations included are not allowed (0 points each)	IEPs must contain a statement of "any individual appropriate accommodations that are necessary to measure the academic achievement and functional performance of the child on state and districtwide assessments. When determining appropriate testing accommodations, the IEP team must research the allowable accommodations for the specific state assessment such as NM-MSSA, NM-ASR, SAT, ACCESS, etc.	Review testing accommodation manuals for state required assessments to make sure IEP teams are considering the allowable accommodations for students with disabilities. Review fall 2022

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<p>3.f. Transition Plans – Annual Goals related to post school goals <i>IEP #1 & #2 - Some or all academic and functional goals are missing the connection to post-secondary goals.</i></p>	<p>Transition IEPs must include annual goals related to transition service needs. With a minimum of one academic and one career/functional. Annual goals should address what needs to be achieved this year to help the student move towards their measurable postsecondary goal. Goal must be outcome oriented.</p>	<p>It is recommended to hold an addendum to add connection to post-secondary goals on the annual academic goals <u>by 4/29/22.</u></p> <p>Christine Duncan conducted an amendment on 4/7/22 to address the recommendations.</p> <p><u>No Additional Follow-up</u></p>
<p>3.i. Transition Plans – Transfer of rights at Age of Majority <i>IEP #2 - Annual notification of the transfer of rights date was not updated.</i></p>	<p>Beginning no later than the first IEP to be in effect when the student turns fourteen (14), or younger, if determined appropriate by the IEP team, and updated annually thereafter; the IEP shall include a statement that the parent and child have been informed of the child's rights under the IDEA that will transfer to the child on reaching the age of majority.</p>	<p>Train staff to ensure this section is completed accurately.</p> <p><i>Review fall 2022</i></p>
<p>4.d. Evaluation-PWN – Prior Written Notice of intent to Evaluate/Reevaluate <i>IEP #3 - Missing notice of the intent to evaluate</i></p>	<p>The public agency must provide notice to the parents of a child with a disability, in accordance with § 300.503, that describes any evaluation procedures the agency proposes to conduct.</p>	<p>Ensure PWN is provided to parents after the Evaluation team has determined if additional data were needed or not and prior to conducting any evaluation.</p> <p><i>Review fall 2022</i></p>

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4.g. Evaluation – EDT – Eligibility Determination Team IEP #3 - EDT/MET document is incomplete, the team included limited information that supports second Eligibility (4.5 points)	Upon completion of the administration of assessments and other evaluation measures, for each eligibility being considered - A group of qualified professionals and the parent of the child determines... In the case of a reevaluation of a child, whether the child continues to need special education and related services. The team must ensure evaluation procedures meet NMTEAM 2017 requirements.	Ensure EDTs/METs include all the pertinent information being considered when making eligibility determination decisions. Review fall 2022
4.i. Consent for Initial Placement IEP #3 - Consent for initial special education placement was obtained 3 months after placement.	A public agency that is responsible for making FAPE available to a child with a disability must obtain informed consent from the parent of the child before the initial provision of special education and related services to the child.	For future initial evaluations, make sure to obtain consent from parents prior to placement in special education. Review fall 2022

* **Highlighted** items have not been completed. Follow-up will be conducted in the **fall 2022**.