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SECRETARY-DESIGNATE OF EDUCATION

SUSANA MARTINEZ
Governor

September 8, 2014

Dear Public Education Commissioners:

Enclosed is the Final 2014 Charter School Application Final Analysis and Recommendation for Technology Leadership High School applying for a state charter in Albuquerque and in the Albuquerque Public Schools school district to serve grades 9th – 12th grades and represented by founders, Tony Monfiletto and Paola Peacock Friedrich. The staff at the Charter Schools Division (CSD) along with a team of independent reviewers gave full consideration to the information gathered in this process.

The CSD has provided evidence and rationale gathered in the team analyses and interviews in this evaluation to fully understand the recommendation. Please give special consideration to section II of this final analysis and recommendation.

Thank you all for your hard work and dedication to ensure that New Mexico's Charter Schools represent the best of alternative and innovative options for parents and students.

Sincerely,

A handwritten signature in blue ink, appearing to read "Matthew Pahl".

Matthew Pahl
Interim Director
Charter Schools Division

I. Recommendation

APPROVE

Overall the application is complete and adequate; and during their Capacity Interview, the applicant(s) demonstrated the capacity to implement the education and governance/management plans as described in the application. Nothing was identified that would indicate the applicant(s) do not have the experience, knowledge, and competence to successfully open and operate a charter school.

APPROVE WITH CONDITIONS

Overall the application is complete and adequate; and during their Capacity Interview, the applicant(s) demonstrated the capacity to implement the education and governance/management plans as described in the application. Nothing was identified that would indicate the applicant(s) do not have the experience, knowledge, and competence to successfully open and operate a charter school; however, the conditions listed below are required by law and must be addressed. If the PEC determines that there are any other conditions that need to be addressed, then those should be negotiated in a contract.

PROPOSED CONDITIONS

The Applicant will negotiate a contract with the Public Education Commission pursuant to 22-8B-9.1:

1. Obtain standing as an approved Board of Finance
2. Secure a facility that meets PSFA Approval
3. Complete the planning-year checklist
4. Complete a PSFA-approved master plan for Health Leadership High School
5. Provide a detailed scope and sequence for all grade levels and subject matter offered in the first year that align with the charter application.
6. Provide a detailed curriculum for all grade levels and subject matter offered in the first 60 days of instruction that align with the charter application.

DENY

Overall the application is either incomplete or inadequate; or during their Capacity Interview, the applicant(s) did not sufficiently demonstrate the experience, knowledge, and competence to successfully open and operate a charter school.

The Charter Schools Act, in paragraph 1 of Subsection L of Section 22-8B-6 NMSA 1978, states that a chartering authority may approve, approve with conditions or deny an application. A chartering authority may deny an application if:

- (1) the application is incomplete or inadequate;

- (2) the application does not propose to offer an educational program consistent with the requirements and purposes of the Charter Schools Act;
- (3) the proposed head administrator or other administrative or fiscal staff was involved with another charter school whose charter was denied or revoked for fiscal management or the proposed head administrator or other administrative or fiscal staff was discharged from a public school for fiscal mismanagement;
- (4) for a proposed state-chartered charter school, it does not request to have the governing body of the charter school designated as a board of finance or the governing body does not qualify as a board of finance; or
- (5) the application is otherwise contrary to the best interests of the charter school's projected students, the local community or the school district in whose geographic boundaries the charter school applies to operate.

CHARTER SCHOOLS DIVISION

By: 

Matthew Pahl, Interim Director of Charter Schools Division, or Designee

II. Explanation Regarding Use of the Score Sheet

In the Recommendation and Final Analysis the CSD has considered the overall score in the written application, as well as the score in each individual section and Capacity Interview. For example, while the total possible points in the Business Plan only equals 52 points, it is essential that an applicant school score high in this section and have a sound financial plan. If an applicant school receives a low score in this section then the CSD carefully considers that in their final analysis.

Also please note two additional considerations:

- First, the CSD does not score the community input hearing, but may reference it in this Recommendation and Final Analysis and if pertinent information was offered that contradicts or affirms what was found in the application or the capacity interview.
- Second, if the applicant school did not answer any prompt because that prompt did not apply to the applicant school (e.g., the applicant school will be an elementary school and so did not provide responses to graduation-related prompts), then the CSD adjusted the total possible points in the application section where the non-applicable item(s) is found as well as in the final score. For this reason, you may see varying possible total points from application to application.

III. Overall Score Sheet

Section	Points Received	Applicant School's Possible Points
Application		
• Education Plan/Academic Framework	83	104
• Organizational Plan and Governance/Organizational Framework	120	159
• Business Plan/ Financial Framework	33	52
• Evidence of Support	21	24
• Required Appendices	4	4
Capacity Interview		
	47	56
Overall Score	308	399

IV. Final Analysis

Application Section	Points Received	Applicant School's Possible Points
EDUCATION PLAN/ACADEMIC FRAMEWORK	83	104

Evidence/Statements Supporting Score in this Section:

The review team found the applicant's responses were clear and adequate. The applicant has a clear vision for how they want their curriculum to be developed. However, the applicant has much to accomplish in its planning year to fully develop a curriculum, including how that curriculum will serve students with special needs. The applicants have experience in designing such curriculum for two other charter schools in the state, and have external partnerships established to accomplish this work.

The applicant's mission statement answers the "what" and the "output"—students prepared for careers in the technology sector. It answers the "how"—collaborating with local and national technology employers and focusing on the social and emotional growth of students. This mission is innovative due to its collaboration and partnership with local and national leaders in the technology field. This model will be new to Public Education and could provide significant relevance to students in their learning, which is mentioned in the executive summary.

The applicant's indicators or goals were specific, realistic, and allowed for flexibility of not knowing exactly who the incoming students are going to be. The applicant forgot one category in what they offer—"falls far below." The rationale provided for the goals was comprehensive, and included research-based evidence that was completely aligned to the mission of the school.

The applicant provided a clear timeline and plan for developing the education program, and the high school graduation requirements are clearly articulated and meet state requirements. Their explanation is clear in identifying responsible staff and aligning the curriculum with the Common Core standards. However, the timeline provided for developing the curriculum lacks some detail. The applicant mentioned developing the curriculum within the planning year, but "deadlines" are not necessarily set or explained. The applicant provided a limited Scope and Sequence. While it is assumed that tech literacy will be incorporated in all classes, this scope and sequence are not clearly aligned with classes and the school's mission. Further, the applicant provides research and data to substantiate how the curriculum will help students. There is a lot of research but it does not always tie back into how the curriculum and instructional program will achieve high outcomes. As a result, one of the conditions for the school's approval will be to have a completed curriculum no later than the June meeting of the PEC.

The applicant provides a clear and comprehensive description of how instruction will be differentiated; however there is no specific example of which teaching techniques in the classroom will be utilized. This response lacked important information around how curriculum and strategies will be differentiated in this project-based learning environment.

Much of the applicant's plan for addressing the educational needs of special populations were clear, but were not comprehensive. For example, in G.3(a), the response requires additional information around the ELL plan.

The applicant described unique and rigorous assessments in this section and in others regarding evaluating the students according to the mission. In addition, the applicant mentions the importance of other assessments (i.e. Discovery) as a tool to intervene and better support students. The applicant also discusses the need to look at national and local averages when studying results.

Application Section	Points Received	Applicant School's Possible Points
ORGANIZATIONAL PLAN AND GOVERNANCE / ORGANIZATIONAL FRAMEWORK	120	159

Evidence/Statements Supporting Score in this Section:

The review team found the applicant's responses incorporated most of the key components of their governance structure and adequately outlined the roles and responsibilities of governing board members.

The applicant provides a comprehensive explanation of the governance structure that specifically outlines the roles and responsibilities of the Governing Board (GB) and its responsibilities in this particular educational model. For instance, there is careful consideration given for the committees that will be formed. There appears to be an error in the By-Laws, which talk about wanting "construction" expertise. The applicants addressed this in their capacity interview, noting the mistake and correcting it verbally to technology.

The applicant provides a compelling and relevant list of all GB members and describes their experience, skills, and qualifications. Membership reflects (or will reflect) the diverse experiences and skills necessary to oversee all aspects of the school. The applicant is very clear in the traits and qualifications that they want from board members, including, "financial expertise, community engagement expertise, social and emotional expertise, etc." They also describe the pipeline that the committee work creates for board members. This is a plan used by many successful schools as committee members become engaged in the school, understand its mission, and the work involved before committing to something more formal such as service on the board. The applicant does not have a budget for professional development activities for its board – its plan seems to align with state requirements, however. The applicant provides a clear plan, but did not address the board's continuous improvement or their assessment tool for the board. The applicant's response demonstrates a limited understating of the Governing Board's monitoring responsibilities.

The applicant has a clear and comprehensive vision for the school leader's roles and responsibilities for the planning and first years. The job description includes information specific to the school's mission i.e., "high level of technology focused applied learning," "building strong and working relationships with the community" "ensure maximum adult mentorship for students," etc.

The applicant provides limited description of all the unique leadership and support positions needed at

the school. Many of the positions are missing appropriate qualifications, such as state licensure. This is missing for teachers, the business manager, director of curriculum and instruction as well as technology sector coach. The applicant provides an inadequate response to the application question. While the applicant explains some of the specific roles of staff within the narrative of the three pillars above, no organizational chart is found here or in the appendices.

It is unclear whether the applicant meets its goal as far as student to teacher ratios; the ratio as interpreted in the application is 45:1. Further, it is unclear how students can have a highly-qualified teacher in all subject areas, with just two staff members. The applicant's school staffing plan is clearly aligned with the budget, projected enrollment and implementation schedule.

The applicant provides a calendar that complies with state requirements and discusses the importance of having the interim school for struggling students.

The professional development plan the applicant provided is limited. It is unclear whether the budget supports the professional development plan. There are no funds in the budget for the professional development line item (53414). It was revealed during the capacity interview that professional development is incorporated into teacher salaries.

The applicant clearly describes the employer/employee relationship and provides clear terms of employment for all classes of employees. They thoroughly explain how it will address employees' recognized representatives. The personnel policies are comprehensive and complete.

The applicant provides a staff discipline process that is clear, generally comprehensive, and cohesive and aligned with stated employer/employee relationship, and follows an appropriate route that ensures due process. However, the applicant's response did not address a grievance process.

The applicant's response was adequate, but lacks mention of collaboration with staff concepts and does not speak to how it will take into account the views of the faculty. The response had few details and did not address an appeal process or outline details and who is involved at each level in that process.

The applicant provides clear, comprehensive, and cohesive Student Discipline Policies that comply with the Student Rights and Responsibilities as set forth in the Public Education Department rules. The applicant provides a detailed explanation of how it will take into account the rights of students with disabilities. The applicant provides a clear plan for addressing alternative educational settings for eligible students who are long-term suspended or expelled. While this response is clear, it is missing details on the transition process for expelled students.

The applicant provides a complete, comprehensive, and cohesive description of its lottery procedures that comply with state statutes, and support equal access to the school. Tentative dates are provided. The recruitment plan is also clear and comprehensive. The applicant has many resources to ensure recruitment.

The applicant provides a current, clear, comprehensive, and cohesive Conflict of Interest Policy that demonstrates an understanding of, and capacity to meet the requirements of the law. The applicant provides a sample disclosure statement of any real or potential conflict of interest.

The applicant provides a comprehensive and clear explanation that demonstrates a complete understanding of, and capacity to comply with the Open Meetings Act in its several parts (agendas

posted 24 hours in advance, quorums, executive or closed session procedures, minutes, etc.), and Inspection of Public Records Act in its several parts (meeting minutes, accessibility to public records, etc.) that meets the requirements of the laws.

The applicant indicates that there is /are third party relation-ship(s), and the applicant provides a clear, comprehensive, and cohesive description of all third- party relationships that are considered integral to accomplishing the mission of the school. They demonstrate an understanding of the legal implication of the relationship to the school.

The applicant provides a list of statutes or state rules for which a waiver is requested, including a rationale for why the wavier is being requested.

The applicant provided an appendix of a facilities master plan, but it appeared to be for a different school. Having a completed, PSFA-approved facilities master plan for Tech Leadership High School is a condition placed on the CSD’s recommendation for approval.

Application Section	Points Received	Applicant School’s Possible Points
BUSINESS PLAN/ FINANCIAL FRAMEWORK	33	52

Evidence/Statements Supporting Score in this Section:

The review team found that the application demonstrates an adequate understanding of and capacity to implement New Mexico public school funding.

The applicant’s budget demonstrates a capacity to implement New Mexico public funding. The budget did not include ELL support or special education ancillary services. The applicant’s explanations include some evidence that adjustments may be viable and realistic.

The applicant provides a clear, comprehensive, and cohesive proposed salary schedule for all key staff, including teachers, administrators, and other salaried / hourly staff that complies with state requirements.

The applicant provides a limited description of policies of internal controls and explanation of the business manager qualifications. However, the applicant provides a limited description of the internal control procedures that will be utilized to safeguard assets. Specifically, their internal fiscal controls around payroll are incomplete and problematic (pg.116), the segregation of duties are not always clarified, and school deposit rules are not in alignment with state statute rules. Their response generally identifies the appropriate staff to perform financial tasks. However, the response does not segregate duties and does not demonstrate they understand how the roles need to be separated for internal controls. The application notes that the office manager who is responsible for internal controls is not hired until year 3.

The applicant provides clear, comprehensive, and cohesive evidence that it has developed an effective and thoughtful outreach program. There is sound evidence that the school has addressed a broad audience to ensure that all students have an equal opportunity to enroll. Clear descriptions of outreach

activities demonstrate that the school is attempting to reach a broad audience and to ensure that all students have an equal opportunity to enroll.

Application Section	Points Received	Applicant School's Possible Points
EVIDENCE OF SUPPORT	21	24

Evidence/Statements Supporting Score in this Section:

The review team found the applicant provided adequate evidence that they have developed effective outreach.

Application Section	Points Received	Applicant School's Possible Points
REQUIRED APPENDICES	4	4

Evidence/Statements Supporting Score in this Section:

The required appendices were uploaded with the application. There is confusion regarding the facilities master plan, as a number of pages feature a different school's name. CSD has placed a condition on this approval to complete a PSFA-approved master facilities plan for Health Leadership High School.

Section	Points Received	Applicant School's Possible Points
CAPACITY INTERVIEW	47	56

Evidence/Statements Supporting Score in this Section:

The review team felt the applicant's response showed a comprehensive understanding of how the mission drives the school's success. The applicant's answers demonstrated a comprehensive understanding of how the school brought innovation to the public education world and how the school would evaluate its mission and its implementation. The applicant recognized there is a lot of translation that needs to happen to take this academic model into current academic frameworks, and plans to use the planning year to determine how to translate projects to credits, etc.

The review team found the applicant's response to be comprehensive and clear with a good

understanding of the steps needed to be prepared to open a school.

The applicant's responses showed the school had a strategy for selecting board members and strong expectations for their performance. Similarly, the review team found the applicant's response to demonstrate a reasonable understanding of the critical role a school leader plays in the success of the school. The applicant's understanding of the role a school leader plays in the success of the charter could have been more comprehensive.

The review team felt the applicant had a limited understanding of the evolving roles of the applicants, board and school leader, particularly how the applicants transition to playing a consultative role in the process. The review team felt the applicant had a limited understanding of the appropriate response from the governing council and the administration if the school's state test scores come back well below targets. The applicant's response suggested that the school will choose to focus on other measures rather than respond to the lower-than-expected scores.

The review team found the applicant's answer to be comprehensive and clear in explaining the importance of by-laws and policies in a charter school. The review team felt the applicant's response demonstrated a comprehensive, clear and reasonable understanding of the importance of having compliant policies that are effective.

The review team found that the applicant has a comprehensive, clear and reasonable plan for securing an adequate facility.

The review team found the answer to this question to be comprehensive, clear and reasonable, and shows the applicant has a plan and has already secured some resources to fund planning year activities.

The review team found the applicant had a comprehensive, clear and reasonable plan for a scenario where 50% of the applicant's anticipated enrollment actually enrolls in the school and their comments on conservatively estimating enrollment and based on past experience is evidence of sound fiscal practice.