September 13, 2013

Dear Public Education Commissioners:

Enclosed is the Final 2013 Charter School Application Final Recommendation and Evaluation for Health Sciences Academy (HSA) applying for a state charter in the Gadsden Independent School District area in Doña Ana County to initially open with grades 7 – 10, expand yearly until 12th grade and represented by founders Lorna Saraj, Raphael Nevins, Nancy Duhigg, and Jamie Tamez. Please know that the process utilized this year by the Charter Schools Division (CSD) deviated from past years and was designed to reflect the Amended Charter Schools Act. We feel we created a very rigorous process. Three teams of highly successful and seasoned charter school leaders and business managers scored both the paper application and the capacity interview totaling 333 points for elementary applications and 342 points for high school applications.

Additionally, the CSD allotted itself 10% of the total points (33 & 34 for ES and HS respectively), available for dispersal called the “CSD Team Synthesis Score”. The rationale is that CSD staff has been involved with the people and the applications since the very beginning and have a perspective that is different from the reviewers and the PEC.

So, in addition to the application and capacity interview score, the “CSD Team Synthesis Score”, which is on the summary score sheet, includes our analysis of whether the applicants: 1) Presented a good idea for a school that is realistic; 2) Explained their idea thoroughly in written and oral forms; 3) Have the requisite capacity to make the school a success; 4) Made a convincing demonstration of capacity, and 5) Have demonstrated sufficient support for the school and whether it will be sustained after the founders move on.

We realize as well that the stated goals in the applications may be refined during the Contract and Performance Frameworks negotiation process that follows at the end of the Planning Year.

Thank you all for your hard work and dedication to ensuring that New Mexico’s Charter Schools represent the best of public school options for parents and students. We are making a difference!

Sincerely,

Tony Gerlicz

Director, Options for Parents: Charter Schools Division

**Recommendation**

**Approve** : with standard requirements to commence operations, (see below)

1. Obtain standing as an approved Board of Finance

2. Negotiate a contract with the Public Education Commission

3. Secure Appropriate Funding

4. Secure a facility that meets PSFA approval

5. Complete the planning-year checklist

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. The CSD sees this application as a researched-based and innovative model of educating youth while preparing them for a career in health related fields. The applicant(s) have the experience, knowledge, and competence to successfully open and operate a charter school, including having an experienced educator already selected as Principal and the beginnings of an exemplary Governing Council.

**Approve with Conditions:** X

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 recommended below are necessary to correct minor concerns raised by the reviewers.

**Additional Proposed Conditions**

The Applicant will complete the following additional conditions beyond the standard ones, according to the timelines set forth therein:

1. Since the majority of the proposed Governing Council members do not reside in Dona Ana County, the school needs to design and provide a mechanism that ensures that the voice of the local community is represented in Governing Council decisions.
2. Since the majority of the proposed Governing Council members do not reside in Dona Ana County, the school needs to design and provide a mechanism that ensures that the Governing Council gather regularly for training and meetings.

**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.

**Options For Parents – Charter Schools Division**

By: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Director of Options for Parents, or Designee

1. **Overall Score Sheet**

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| **Section** | **Points Received** | **Applicant School’s Possible Points** | **%** |
| Application |  |  |  |
| * School Mission | 6 | 6 |  |
| * Education Plan/Academic Framework | 66 | 90 |  |
| * Organizational Plan and Governance/Organizational Framework | 91 | 126 |  |
| * Business Plan/ Financial Framework | 31.3 | 48 |  |
| * Evidence of Support | 17 | 24 |  |
| * Required Appendices | 3 | 3 |  |
| Capacity Interview | 28 | 45 |  |
| **Sub Score** | 242.3 | 342 |  |
| CSD Team Synthesis Score - (CSD up to 33 pts available) | 24 |  |  |
| **Overall Score** | 266.3 | 342 | 78.0 |

**Explanation Regarding Score Sheet**

Legislation creating Charter Schools in New Mexico was initially passed in 1992, and was amended in 1999 and again in 2011.  The intent was to create independent public schools of choice that would enjoy, and be held accountable for, increased autonomy.   Innovation, autonomy, choice, and accountability are hallmarks of the charter movement.  In the new charter school application review process, the CSD has done a complete analysis of all evaluation components and then analyzed how those components, and the proposed school in general, would contribute positively to the diverse public school educational landscape in New Mexico and the overarching charter schools movement.

The external review teams considered three categories of each new charter school application: the Academic/ Educational Plan, the Organizational Plan, and the Financial Plan.  The Paper Application consisted of 81 questions with some questions weighted more heavily than others, as reflected in the score sheets.  The Capacity Interview consisted of 14 standard questions and one that was uniquely tailored to the school. All questions were weighted equally.  Subsequently, community input hearings took place in the community of the proposed school to ascertain the level of support that the applicant school has in that community.

The CSD then added its 10% ***CSD Team Synthesis Score***. The purpose of the ***CSD Team Synthesis Score*** is to ensure that the CSD brings its perspective to the analysis, in addition to that of the external reviewers as explained above.

1. **Final Analysis**

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| **Application Section** | **Points Received** | **Applicant School’s Possible Points** |
| **Mission** | 6 | 6 |
| **Evidence/Statements Supporting Score in this Section:**  The mission is strong, clear, and reasonable and includes the key elements articulated in the rubric. | | |

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| **Application Section** | **Points Received** | **Applicant School’s Possible Points** |
| **Education Plan/Academic Framework** | 66 | 90 |
| **Evidence/Statements Supporting Score in this Section:**  The application provides a clear description of the educational program and curriculum that is reasonable and supports the mission of the school. The goals contain most of the required elements and are also broadly aligned with the school’s mission. The application provides a general rationale for the school goals, as well as a plan and methods for assessing them. Research is provided and supports the educational plan of the school; however, the research is somewhat limited in scope. The scope and sequence provided is broadly written and appears to align with the mission of the school.  Required information about the curriculum development timeline and curriculum alignment with the Common Core/Standards is provided, although it is somewhat limited. Curriculum development appears to focus more on identifying appropriate instructional materials as distinct from developing an integrated health sciences curriculum as indicated in the school’s mission. The application provides an overview of the instructional strategies the school will employ. The explanation of the effectiveness of instructional strategies provided is clear. The description of differentiated instruction provided is clear but limited to a single strategy, that being the use of instructional assistants in the classroom to provide small group instruction.  The Special Populations section, including Access to Special Education Services, IEP Monitoring, and Graduation, are clear, and comprehensive. The proposed staffing plan and supporting budget are clear and adequate. There is a significant use of Instructional Assistants who are coming from graduate programs at New Mexico State University, which can be very good if properly supervised. The application lacks meaningful detail about how students with Section 504 Plans will be evaluated, served, or monitored.  Identification of ELL students is clear and cohesive. The application provides a clear description of how services will be provided to ELL students, important for the population the school plans to serve. There is also a clear discussion of instructional strategies that will be used by all teachers, although the discussion provides limited detail about how specifically TESOL or bilingually endorsed teachers will be employed. The ELL staffing section does not mention TESOL certified staff and/or Licensed Bilingual teachers. The ELL differentiated instruction description is clear and meaningful examples are provided. The application provides a clear plan for ELL monitoring which relies on Discovery Education short cycle assessment to identify the needs of ELL students, but here meaningful detail is lacking.  The plan describing the use of assessments is clear, cohesive, and comprehensive and demonstrates that the school has considered alignment with the common core standards. The school also provides a clear, cohesive, and comprehensive description of the actions it will take if the school's student achievement falls short of expectations. The school provides a clear, cohesive plan for reporting progress on the short cycle assessment to students as well as parents. | | |

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| **Application Section** | **Points Received** | **Applicant School’s Possible Points** |
| **Organizational Plan and Governance/Organizational Framework** | 91 | 126 |
| **Evidence/Statements Supporting Score in this Section:**  The school incorporates all key components of the governance structure. They clearly outline roles and responsibilities of the Governing Council and provide a comprehensive set of by-laws. The list of proposed Governing Council members is compelling and relevant and reflects diverse skills and experience that will provide essential support to the school. The plan for selecting Governing Council members is clear, but it appears limited to the current proposed list of council members. The plan did not appear to support a succession plan for identifying and recruiting equally compelling future council members. The plan for training Governing Council members is clear and complies with state law. Similarly, the Governing Council self evaluation plan is clear.  The description of the Governing Council in the application adequately demonstrates its understanding of and capacity to monitor student achievement and ensure the school’s financial and organizational health. The application provides a clear description of the head administrator's qualifications as well as a plan for evaluating the head administrator.  The application addresses the employer/employee relationship, however not for all classifications of employees. The personnel policies are clear and generally comply with state law. The staff discipline process is clear and follows an appropriate route to ensure due process. The grievance process is also clear and provides for protections, legal compliance, and timelines.  The application describes opportunities for community involvement in the governance of the school, however the description is limited. The chief formal vehicle for community participation is in a School Advisory Committee. This committee could include parents as well as other members of the community. The application places the complaint resolution process in the hands of the School Advisory Committee. The review team expressed some concern about this committee handling complaints of a confidential nature involving sensitive student information, potentially violating FERPA protections.  The student discipline policies are clear, comply with state law, and take into consideration students with disabilities. The student recruitment plan and the proposed lottery process are clear and adequate in most areas but lack a timeline. More on the management of the waiting list would be helpful. These policies and plans could be more fully developed in a planning year.  The conflict of interest discussion is clear and demonstrates an understanding of the law. The description of transparency is broadly written with respect to the demands of the Open Meetings Act.  The school requested all applicable waivers. The rationale for the waivers clearly demonstrates the need for the waivers and their use aligns with the mission of the school.  The founders have completed and submitted their Facilities Master Plan to the Public School Facilities Authority (PSFA). In addition, they have researched potential sites. They have also provided a detailed description of that funding and have provided projected facility costs through spring 2019. | | |

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| **Application Section** | **Points Received** | **Applicant School’s Possible Points** |
| **Business Plan/ Financial Framework** | 31.3 | 48 |
| **Evidence/Statements Supporting Score in this Section:**  The founders included the 910B5 forms; there are minor errors. For example, the enrollment on 910B5 does not match the staffing plan in the application or the summary. In addition, revenue per the 910B5 does not tie exactly to the revenue budget sheets. The 5-year budget plan and Budget Narrative support the mission and goals of the school. Some inconsistencies here, however, may suggest questions about the founders’ understanding of school budget and the process of budgeting. These would, of course, be easily corrected as the school prepared its actual budget for PED review. Some examples are: Number of teachers indicated in year 2 in the budget narrative does not agree with the numbers in the budget plan. The narrative states the school will have a full-time business manager, but the actual budget says that position will be a .75 FTE. The school provides a clear and cohesive description of what budget adjustments will be made in case of a short-fall and evidence is provided that the adjustments are viable and realistic. Salary schedules are also clear and cohesive.  Financial policies and internal controls are clear and cohesive. They comply with financial best practices and demonstrate capacity to manage public funds. Appropriate financial staff is identified and these positions are supported through the organizational structure. A clear description of how the Governing Council will provide fiscal oversight is also provided. The school sustainability section indicates an understanding of long-range planning and school sustainability. | | |

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| **Application Section** | **Points Received** | **Applicant School’s Possible Points** |
| **Evidence of Support** | 17 | 24 |
| **Evidence/Statements Supporting Score in this Section:**  The school describes two outreach activities conducted this spring. They appear to have addressed a broad audience. However, the evidence of a more complete outreach plan is lacking. The school provides sufficient, measurable, and quantifiable data indicating support of the school by the community. The founders indicate strong ties to the community and a familiarity with the needs of the targeted student population. There are good networking relationships and letters of support in the appendices. The school provides clear evidence of the uniqueness of the school in the geographical area.  All appendices are provided except those that do not apply. | | |

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| **Section** | **Points Received** | **Applicant School’s Possible Points** |
| **Capacity Interview** | 28 | 45 |
| **Evidence/Statements Supporting Score in this Section:**  The capacity interview presented the reviewers with a unique opportunity to meet the leader for the planning year of the proposed school, Mr. Ron Haugen. Mr. Haugen is the former Superintendent of the Gadsden Independent School District. Mr. Haugen has expressed solid support in this project, stated his familiarity with the model which he had seen operating in the El Paso school district. He is enthusiastic about coming out of retirement to head this school. Mr. Haugen answered questions completely and knowledgeably. He demonstrated an understanding of the curricular model of the proposed school, an understanding of how governing councils work and how a school’s finances should be managed. Mr. Haugen has all the requisite experience to not only administer this school, but to engage the community in the initial start-up phase. Mr. Haugen is known and respected in the community.  The question of how the school will open without available federal funds was answered clearly and comprehensively. It is clear the school has thought about building support among other partners within the Health Care community. | | |

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| |  |  |  | | --- | --- | --- | | **Section** | **Points Received** | **Applicant School’s Possible Points** | | **CSD Synthesis** | 24 | 34 | |
| **Evidence/Statements Supporting Score in this Section:**  CSD recommends approval with the conditions for the Health Sciences Academy Charter School. The Governing Council listed is very strong and includes Dr. Mary Carter, who was recently selected as a State of New Mexico “Luminaria,” an award presented by the New Mexico Community Foundation recognizing and honoring people who are making a difference, or have made a difference, in the state in their respective fields. Since the majority of the proposed Governing Council members do not reside in Dona Ana County, the proposed school must design and provide a mechanism that ensures the voice of the local community is represented in Governing Council decisions.  Securing a commitment from Mr. Ron Haugen as the leader during the planning year is impressive. Mr. Haugen is highly and widely admired from his tenure as Superintendent of the Gadsden School District. He has long established ties to the local community, and is familiar with the proposed educational model of HSA having seen a successful health sciences model in the El Paso School District. It was impressive to witness a number of people express enthusiasm for Mr. Haugen’s participation in the school during the Community Input Hearing. Leadership is fundamentally important to the success of charters and with a solid Governing Council in place, and with Mr. Haugen as the committed leader for the planning year, there is a strong probability that the proposed school will be successful.  This is the second year HSA has applied to be a state charter school. The CSD deems this application to be more complete than last year’s and acknowledges the high level of community support that has been expressed. CSD received over 400 signatures indicating support for this charter school application. It is the CSD’s recommendation that the application from the Health Sciences Academy Charter School be approved with the noted conditions. |