

**2010 CHARTER SCHOOL APPLICATION RECOMMENDATION & EVALUATION**

|  |                                       |
|--|---------------------------------------|
| <b>Name: Sage Charter School</b>   | <b>Projected Grades: K-12</b>         |
| <b>Projected Enrollment: 452</b>   | <b>Proposed location: Albuquerque</b> |
| <b>Founders: Algene Herrick and Elizabeth Anderson</b>   |                                       |
| <b>Recommendation:</b> I recommend that the Public Education Commission <b>Deny</b> the application because it is incomplete and inadequate. |                                       |

The Sage Charter School application does not provide sufficient measurable goals in either their mission or their educational plan to hold the school accountable. In addition, there are significant issues with the financial and governance plan that weaken the overall soundness of the application. Although the founders rely on the Montessori curricula, there are significant elements missing throughout that make this an incomplete and inadequate application.

The reasons for recommending denial of this application are based on the evaluation of each of the sections of the application:

The mission section for the Sage Charter School fails to clearly articulate measurable organizational goals with time-specific targets that create a comprehensible accountability structure for the proposed school.

The educational plan fails to provide some basic curricular information for all of the proposed grades in the application. The implementation process for providing the Montessori approach is described, however, clear, measurable, and time-specific student performance expectations are not articulated clearly. The assessment system for tracking student achievement is confusing and not aligned to the student performance expectations, the instructional strategies to be used are not fully developed, and the plan for aligning the entire K-12 curriculum to the New Mexico Standards and Benchmarks is not complete.

The applicant's five-year budget failed to provide consistent information to connect the resources requested to the plan presented. The application's failure to present a budget based on the correct number of students projected demonstrates a fundamental misunderstanding about how to plan an appropriate budget.

The governance section of the application fails to provide a clear organizational structure. The inclusion of the head administrator as an “ex-officio” member of the governing body presents a conflict of interest. The school organizational structure is not clearly described and the job descriptions for key positions are not provided.

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Dr. Don Duran, Assistant Secretary of Education  
**CHARTER SCHOOLS DIVISION**

**Date: September 2, 2010**

**CHARTER SCHOOL MISSION AND STATEMENT OF NEED EVALUATION**

| <b>Inadequate</b>                   | <b>Approaches</b>        | <b>Meets</b>             | <b>Exceeds</b>           |
|-------------------------------------|--------------------------|--------------------------|--------------------------|
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Sage Charter School (SCS) focuses their statement of need in support of this application on monitoring Hispanic student progress and helping close the achievement gap between Hispanic and Caucasian students as targeted by NM legislative House Bill 150a *Hispanic Education Act* and also on meeting the educational needs and issues identified by the LFC Committee's 6/4/09 *The Three-Tiered Licensure and The Achievement Gap, Report #09-08*.

The organizational goals are not written as SMART goals and lack in measurability and time targets. Clear metrics that would measure each goal to help the school determine progress, improvement, amount of increase, and/or degree of completion, are missing. It is also unclear what data will be collected to support the school's data-driven processes. Target dates and timelines to help determine how well the school is meeting its organizational goals over the full five years are missing. The organizational/school goals do not adequately and completely support, explain, or relate to how the mission will be achieved. SMART "goals" 1 and 2 do not align or correlate to the four indicators of the mission statement.

**EDUCATIONAL PLAN EVALUATION**

| <b>Inadequate</b>                   | <b>Approaches</b>        | <b>Meets</b>             | <b>Exceeds</b>           |
|-------------------------------------|--------------------------|--------------------------|--------------------------|
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

The application is replete with Montessori information and samples, but disproportionately focused on the quantifiable and qualitative terms of implementing the Montessori model within this school rather than the student achievement results such implementation would provide. The data to be collected to demonstrate that the model is working is incompletely and inadequately addressed thus resulting in unclear terms to which the school will be held accountable.

While this plan adequately describes the planned approach based on Dr. Montessori's research to be implemented, it fails to adequately and completely address the metrics and measures, expected outcomes and student expectations, and 5-year timelines/target dates that will be used to quantify the school's success in implementing the Montessori curricula K-12, namely to positively impact student achievement. The student-centered SMART goals that are presented do not adequately and completely articulate what the school will hold itself accountable for relative to student achievement for all grades. As stated, the three goals are focused on grades 1-8 only. It is unclear what student learning and achievement for grades 9-12 are expected to be. These are important missing elements in the application and do not provide a comprehensive educational plan for all of the grades the proposed school intends to serve.

For all grades, varied forms and types of assessments to be used to measure student performance are presented, but quantifiable expectations for students over the five-year term are

not adequately and completely articulated. This plan is missing significant detail and additional information to make it reasonably comprehensive relative to numerous educational concepts, alignment with NM content standards, instructional strategies/methods, student performance expectations and measures for course/subject contents, instructional delivery, assessment, development, and implementation of curriculum and alignment for the Student Service Learning/Project course, PE, Music and elective courses/programs. The assessment system for tracking student achievement is confusing and not aligned to the student performance expectations, the instructional strategies to be used are not fully developed, and the plan for aligning the entire K-12 curriculum to the New Mexico Standards and Benchmarks is not complete.

The student performance and evaluation sub-sections lack significant detail and important additional information to be reasonably comprehensive in identifying student-centered goals with clearly defined measures that are time-specific with target dates to assess student performance during the full 5-year term of the applicant's proposed charter. Throughout this section, clear metrics that will measure what students will be held accountable for knowing and being able to do and at what quantifiable levels are lacking. Clear descriptions of how the student SMART goals are reflective of the school's mission are also lacking.

### FINANCIAL PLAN EVALUATION

| Inadequate                          | Approaches               | Meets                    | Exceeds                  |
|-------------------------------------|--------------------------|--------------------------|--------------------------|
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

The budget that was provided in the application contained inconsistent information with regard to enrollment projections and the revenue to be budgeted based on those projections. The disconnect between the projections provided in the budget and the student enrollment numbers used in other sections of the application cause inconsistencies in the financial plan and impacts the overall alignment of resources to support the implementation of the educational plan. The applicant provided new information in this section; specifically, the applicant replaced what they termed to be “the preliminary draft budget that was inadvertently submitted in the initial charter application” with corrected budget documents.

The plan does cite that the school will also apply for federal grant funds and utilize funds from the Instructional Materials, Title I, IDEA-B, PSCOC lease reimbursement funds, elementary and secondary art, music, theater and dance funding as well as seek funds from the City of Albuquerque. Adequate expenditure assumptions for using these funds are presented.

## GOVERNANCE / MANAGEMENT PLAN EVALUATION

| Inadequate                          | Approaches               | Meets                    | Exceeds                  |
|-------------------------------------|--------------------------|--------------------------|--------------------------|
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

The organizational chart addresses some of the criteria required, but omits important specific information about the roles and responsibilities of key stakeholder groups, including positions to be filled in the future. As depicted, the reporting structure presents a confusing hierarchal picture of the organization’s positions. It is difficult to accurately discern who reports to whom. The inclusion of the head administrator as an “ex-officio” member of the governing body presents a conflict of interest.

This plan fails to indicate that the school will publish the number of openings for each grade level prior to each lottery and the “rolling registration/enrollment periods” are not aligned to state guidance.

The information that should clearly articulate the hierarchal reporting and tasking structure for all personnel within the school organizational structure is missing along with key position descriptions.

## REQUIREMENTS EVALUATION

| Inadequate               | Approaches               | Meets                               | Exceeds                  |
|--------------------------|--------------------------|-------------------------------------|--------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

The application addresses all of the required components in this section.