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HANNA SKANDERA  
SECRETARY-DESIGNATE OF EDUCATION

SUSANA MARTINEZ  
Governor

September 5, 2012

Dear Public Education Commissioners:

Enclosed is the 2012 Charter School Application Final Recommendation and Evaluation for Taos Mountain Charter School applying for a state charter in Taos Municipal Schools to serve grades K-12 and represented by founders, Dr. Allison Bradley and Emily Cohen. Please know that the staff at the Charter Schools Division and four teams of independent reviewers gave full consideration to the information gathered in this process.

The review teams and the Charter Schools Division (CSD) have provided evidence and rationale gathered in the team analyses and in this evaluation to fully understand the 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,

Kelly Callahan  
Interim Director  
Options for Parents: 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 preliminary contract.

### PROPOSED CONDITIONS

The Applicant will negotiate a preliminary 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

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: \_\_\_\_\_

Interim Director of Options for Parents, or Designee

## I. Overall Score Sheet

Section	Points Received	Applicant School's Possible Points
Application		
• Executive Summary	3	4
• Education Plan/Academic Framework	59	106
• Organizational Plan and Governance/Organizational Framework	44.5	68
• Business Plan/ Financial Framework	8	18
• Evidence of Support	6	10
• Required Appendices	1	2
Capacity Interview	23.5	30
<b>Overall Score</b>	<b>145</b>	<b>238</b>

## II. Explanation Regarding Score Sheet

In the final recommendation and analysis the review team and the CSD considers the overall score as well as the score in each individual section. For example, while the total possible points in the Business Plan only equals 18 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 review team carefully considers that in their final analysis. Also please note that while the review team did not score the community input hearing, the review team and the CSD may reference it in the final recommendation and evaluation if pertinent information was offered that contradicts or affirms what was found in the application or the capacity interview. Second, if the applicant school's proposal did not answer any prompt as a result of applicability (e.g., the applicant school will be an elementary school and so did not provide responses to graduation-related prompts) then the review team and CSD will adjust the total possible points in the application section where the non-applicable item(s) is found as well as in the final score.

### III. Final Analysis

Application Section	Points Received	Applicant School's Possible Points
Education Plan/Academic Framework	59	106
<p>Evidence/Statements Supporting Score in this Section</p> <p>The Education Plan section of the application requires the applicants' description of the proposed school's size, vision, mission, goals, curriculum, graduation requirements, instructional program, how special populations will be served, and its assessment and accountability plan.</p> <p>The mission and vision presented for the proposed charter school are adequately stated. Additionally, the proposed Waldorf-inspired curriculum and instructional program are adequately described and strongly supported with research, clearly demonstrating the applicants' knowledge and expertise in this area.</p> <p>In regard to educational goals, some quantifiable information describing what the school intends to accomplish is provided; however, the information is broad and measures are vague, failing to reflect an integrated coherent structure in the form of specific, measurable, ambitious and attainable, time-bound goals as required by the application. Overall, educational goal information statements that are provided do not meet the stated evaluation criteria and do not lend themselves to monitoring progress over the proposed term of the charter. In some subsections, no goal statements are provided.</p> <p>The applicants chose to provide organizational goals in addition to the required educational goals. Four general organizational goals are presented that have the potential to be written in measurable terms. However, as presented, these organizational goals are also lacking specific, measurable, ambitious, and time-bound elements as required by the application.</p> <p>Graduation requirements are addressed, but not enough information is provided to ascertain if a waiver of graduation requirements will need to be requested.</p> <p>The application addresses special populations and provides some general knowledge about requirements of law for special education and students with 504 plans. The application does not, however, adequately address key components required to meet the needs of English Language Learners (ELL), indicating limited knowledge of mandated services and support required for ELL students in the state of New Mexico public school system.</p> <p>Overall, the proposed school's assessment and accountability plan is addressed in broad terms. The application does not provide a clear and comprehensive plan to analyze data and address school-wide practices that may need to be changed as a result of the data analysis. Specific details required to conduct data analysis as utilized in a public school for progress monitoring, reporting, and possible school-wide corrective action are not clearly presented.</p> <p>In summary, the education plan demonstrates strength in Waldorf-inspired curriculum and instruction,</p>		

but demonstrates limited knowledge of the requirements of public school accountability and mandated services for special populations.

Application Section	Points Received	Applicant School's Possible Points
Organizational Plan and Governance/Organizational Framework	44.5	68
<p><b>Evidence/Statements Supporting Score in this Section</b></p> <p>The Organizational Plan and Governance section of the application requires the applicants' to address the governing body creation/capacity, governing body training and evaluation, leadership and management, organizational structure of the school, employee relationships, community/parent/employee involvement in governance, student policies, student recruitment and enrollment, legal compliance, partnership/contractor relationship (if applicable), waivers, transportation and food, and facilities.</p> <p>The founders have substantial experience in nonprofit, business and private school settings, and prospective governing body members have experience in organizational development; community outreach; leadership; school administration; charter schools; budgets; parental involvement; business; and educational entrepreneurship. On a broad scale, potential capacity of the proposed governing body membership is clear; however, details related to future membership recruitment, annual self-evaluation, and identification of skills necessary to oversee a public charter school are lacking in the application narrative.</p> <p>The leadership, management and organizational structure sections adequately address most application requirements; however, the staffing plan outlined on pages 127-128 of the application shows some misalignment when compared with the 5-year budget plan.</p> <p>Employee- and student-related policies and procedures are inadequately addressed or missing (to be developed at a later time). A description of Waldorf student discipline goals and processes is provided, indicating expertise in the Waldorf methods, but the lack of connection with public school student rights and responsibilities indicates an apparent lack of knowledge of New Mexico law. Similarly, the lack of employee policies leads the reviewers to the same conclusion.</p> <p>The student recruitment and enrollment subsection is unevenly addressed, demonstrating some understanding of the recruitment and enrollment processes, but, at the same time, a lack of familiarity with details of New Mexico law regarding the lottery process and conditions for disenrollment of students.</p> <p>The legal compliance subsection requirements are partially addressed, the waiver subsection is adequately addressed, and the partnership, transportation and food services subsections are not applicable.</p>		

The school has identified an existing facility currently occupied by Taos Waldorf School which will close if this application is approved. A PSFA approval letter is provided based on the use of the current Taos Waldorf School facilities. Stated also in the application is that the land will be deeded to the Steiner Foundation which will then rent the facility to Taos Mountain Charter School.

In conclusion, this section is strong in proposed governing body membership and expertise, leadership, management and organizational structure, but demonstrates an overall lack of knowledge and familiarity with New Mexico public school law and requirements. The gap in knowledge regarding differences between private school operation and public school operation is substantial.

Application Section	Points Received	Applicant School's Possible Points
Business Plan/ Financial Framework	8	18
<p>Evidence/Statements Supporting Score in this Section</p> <p>The Business Plan/Financial Framework Section requires the applicants to address projected revenue, a five-year budget plan based on the revenue, financial policies and oversight, compliance, and sustainability.</p> <p>This section of the application fails to demonstrate adequate knowledge of New Mexico public school finance. Numerous errors are found throughout this section, most notably failure to provide a balanced budget, adequately fund staff benefits, meet minimum salary requirements for the school Director, adequately fund required audits, and provide for projected legal expenses. The proposed salary schedule does not meet state requirements to comply with the current 3-tier licensure and salary system. Although the basic requirements of the Financial Policies and Oversight, Compliance and Sustainability sections are addressed, the level of detail required for clarity of implementation is missing. The staffing plan provided in the application does not align with the 5-year budget plan. Facility maintenance, repair and equipment needs are not reflected in the budget and a rationale for these omissions is not provided.</p> <p>Overall, the applicants' response for this section indicates a limited familiarity with and understanding of New Mexico state law pertaining to school finance.</p>		

Application Section	Points Received	Applicant School's Possible Points
Executive Summary, Evidence of Support, Required Appendices	10	16
<p>Evidence/Statements Supporting Score in this Section</p> <p>The Executive Summary presents a solid overview of Waldorf-inspired education, including the philosophy, educational program, strategies for assessment, history and school culture; however the Executive Summary fails to address some key components required by the application, including demographic data, the targeted geographical area of the proposed school, where under-served students are currently being educated, and why Taos Mountain Charter School would be more effective than the schools currently serving the student population.</p> <p>The Founders' ties to the community are adequately addressed. Nine letters of support from community members, most of whom are familiar with the success of current and past students of the Taos Waldorf School, are provided. However, limited evidence is provided to demonstrate that outreach activities will reach a broad audience to ensure that all students in the geographic area have an equal opportunity to enroll. Development of community partnerships and relationships are in the planning stage and are not yet clearly established.</p> <p>All but two required documents are provided in the appendices: governing body personnel policies; and, the student discipline policy.</p>		

Section	Points Received	Applicant School's Possible Points
Capacity Interview	23.5	30
<p>Evidence/Statements Supporting Score in this Section</p> <p>The applicant team clearly demonstrated knowledge of and experience with the proposed Waldorf-inspired philosophy and curriculum. The applicant team also provided knowledgeable responses to aspects of governing body responsibilities and requirements.</p> <p>However, the applicant team's responses also indicated a limited familiarity with the requirements of New Mexico public school law and did not sufficiently demonstrate the experience and knowledge to successfully open and operate a public charter school at this time.</p>		

Other Pertinent Information
The intent of the founders, if the charter application is approved, is to close the current Taos Waldorf

School and, using the existing facility and furnishings, to open a public charter school under the name of Taos Mountain Charter School. The current Taos Waldorf School serves grades K-8; the proposed Taos Mountain Charter School would open by serving grades K-6 and 9, and ultimately serve grades K-12. The requested enrollment cap is 300 students.

Based on the PED Charter Schools data, 5 charter schools (3 district-authorized and 2 PEC-authorized) within the Taos Municipal Schools geographical boundaries now serve 27% of the district enrollment. With the addition of this school, if approved, charter schools would serve 39% of the district enrollment.