GOVERNING BODY TRAINING PROVIDER APPLICATION RUBRIC, CHECKLIST, AND DECISION NOTIFICATION

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| --- | --- | --- | --- |
| Organization/Entity: |  | Facilitator’s Name: |  |
| Organization/Entity Contact: |  | Facilitator’s Email: |  |
| Contact Person’s Email: |  | Course Name: |  |
| Date of Submittal: |  | Application Evaluation Deadline: |  |

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| --- | --- |
| Name of Charter School Division Reviewer: |  |
| Administrative Review Decision: [ ]  Complete [ ]  Incomplete | Administrative Review Date:  |  |
| Substantive Review Decision: [ ]  APPROVED [ ]  DENIED | Substantive Review Date:  |  |
| Public Education Department Course Code:  |  | Total Credit Hour Approval: |  |
| Credit Hours by Area: |  Public official/charter school governing body ethics and responsibilities  Charter school fiscal requirements pursuant to the Public School Finance Act Understanding and evaluating academic data, including state assessment, school and teacher accountability systems, and interim and summative academic assessment data  Open government and public school access requirements  Understanding and overseeing the organizational performance of a charter school School specific onboarding |
| Date Applicant Notified of Approval:  |  |

**ADMINISTRATIVE REVIEW**

| **CHECK IF INCLUDED AND CORRECT:** | **CHECK IF INCOMPLETE AND INCLUDE EXPLANATION** |
| --- | --- |
| [ ] 6.80.5.11.D.(1)(a) the application package identifies a specific individual as a proposed facilitator; |[ ]
| [ ] 6.80.5.11.D.(1)(b) the application package contains all the information, materials, documents, attachments, signatures, and notarizations(optional) identified in the application posted on the division’s website:**REQUIRED**[ ]  Training agenda, including time specifications and standards addressed[ ]  Presentation Slides (PDF)[ ]  Handouts[ ]  Description of pedagogical approach and activities[ ]  Skills and expertise of trainer (résumé)[ ]  Training evaluation tool[ ]  *Assessment Tool (for virtual course)*[ ]  *Description of timeout technology (for* *virtual course)***OPTIONAL**[ ]  Other information that demonstrates knowledge of facilitator: transcripts, and references/employment references. |[ ]
| [ ]  6.80.5.11.D.(1)(c) all the application package's components are formatted as required and in PDF |[ ]
| [ ]  6.80.5.11.D.(1)(d) the proposed designated curriculum addresses at least one of the required areas identified in items Subsection A of 6.80.5.8 |[ ]
| [ ]  6.80.5.11.D.(1)(e) all templates are unmodified, completely filled out, and from the current application package |[ ]

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| [ ]  Administratively Complete[ ]  Administratively Incomplete[[1]](#footnote-1)  | Date Applicant Notified: |  |
| Charter School Division Reviewer: |  |

**SUBSTANTIVE REVIEW**

| CHECK IF APPLICATION **MEETS** SUBSTANTIVE REQUIREMENTS | CHECK IF APPLICATION **PARTIALLY** MEETS or **DOES NOT MEET** SUBSTANTIVE REQUIREMENTS AND INCLUDE EXPLANATION |
| --- | --- |
| 6.80.5.11.E.(2)(a) the applicant has provided evidence that demonstrates the designated facilitator has expertise in the area of the designated curriculum:[ ] knowledge[ ] skills, and [ ] experience | [ ] Partially Meets  | [ ] Does Not Meet  |
| * Documents demonstrate limited training, education and/or experience in one or more topics addressed
* Documents demonstrate training, education, and/or experience in some, but not all of the topics addressed
 | * Documents demonstrate no training, education or experience in any of the topics addressed
 |
| [ ] 6.80.5.11.E.(2)(b) the designated facilitator proposed by the applicant has not served in any of the following roles for a charter school that had its board of finance suspended or its charter revoked or non-renewed at the time of the activity that was the reason for the suspension, revocation, or non-renewal: * governing body member,
* administrator,
* senior leader or
* business manager
 | [ ] Does Not Meet  |
| * PED has information that demonstrates the designated facilitator proposed by the applicant served in one of the following roles for a charter school that had its board of finance suspended or its charter revoked or non-renewed at the time of the activity that was the reason for the suspension, revocation, or non-renewal:
	+ governing body member,
	+ administrator,
	+ senior leader or
	+ business manager
* Required Assurance was not completed
 |
| [ ] 6.80.5.11.E.(2)(c) the designated facilitator proposed by the applicant has not been convicted of a crime of moral turpitude and has not had a professional license revoked and has not been subject to disciplinary action for ethical or fiscal misconduct  | [ ] Does Not Meet |
| * PED has information that demonstrates the designated facilitator proposed by the applicant has been convicted of a crime of moral turpitude and/or has had a professional license revoked and/or has been subject to disciplinary action for ethical or fiscal misconduct
* Required Assurance was not completed
 |
| [ ] 6.80.5.11.E.(2)(e) the time allotted or planned for providing the training is sufficient and not excessive for the proposed content and materials provided | [ ] Does Not Meet  |
| * Based on the professional judgment of PED the materials provided do not support the amount of time requested for approval
* Based on the professional judgment of the PED the materials provided cannot be adequately addressed in the time allotted
 |

|  CHECK IF APPLICATION **MEETS** SUBSTANTIVE REQUIREMENTS | CHECK IF APPLICATION **PARTIALLY** MEETS or **DOES NOT MEET** SUBSTANTIVE REQUIREMENTS AND INCLUDE EXPLANATION |
| --- | --- |
| [ ] 6.80.5.11.E.(2)(f) if the applicant intends on charging a fee for the governing body training, the fee is reasonable as compared to local and national providers of similar trainings[ ] N/A (no fee) | [ ] Partially Meets  | [ ] Does Not Meet |
| * Documents demonstrate limited consideration of local and national providers of similar trainings
* Documents demonstrate that the trainings are more costly than other providers and provides limited justification for the differences
 | * No documentation is provided to demonstrate consideration of local and national providers of similar trainings
* Documents demonstrate that the trainings are significantly more costly than other providers and no justification is provided for the differences
 |
| [ ] 6.80.5.11.E.(2)(d) the proposed designated curriculum addresses the required areas identified in Subsection A of 6.80.5.9 NMAC and is legally and factually accurate. Check area(s) chosen by applicant:[ ] public official/charter school governing body ethics and responsibilities[ ] charter school fiscal requirements[ ] understanding and evaluating academic data[ ] legal and organizational performance requirements[ ] open government requirements[ ] school specific onboarding | [ ] Partially Meets  | [ ] Does Not Meet  |
| * The proposal addresses one or more required areas, but the materials provided contain minor inaccuracies either factual or legal
* The materials provided contain accurate information, but are missing essential pieces of information, which causes the materials to be misleading or confusing
 | * The proposal does not address one or more of the required areas
* The materials provided contain major inaccuracies either factual or legal (incorrect legal references, inaccurate legal interpretations that conflict with legal decisions or guidance, outdated references, etc.)
 |
| [ ] 6.80.5.11.E.(2)(i) The applicant describes a process it will use to evaluate the quality of the trainings, which includes end of training evaluations completed by all attendees to evaluate: [ ] (ii) knowledge and skill of the facilitator; [ ] (iii) quality and relevance of the information; [ ] (iv) what actions the attendees will take based on what they learned in the governing body training; and [ ] (v) the value of the governing training in improving the attendees’ knowledge, skills, and abilities to fulfill their statutory duties and comply with all applicable laws.  | [ ] Partially Meets  | [ ] Does Not Meet  |
| * The proposal includes a process to evaluate the quality of training, but the process is missing one or two of the elements identified
 | * The proposal does not include a process to evaluate the quality of training
* The proposal includes a process to evaluate the quality of training, but the process is missing three or four of the elements identified
 |

| CHECK IF APPLICATION MEETS SUBSTANTIVE REQUIREMENTS | CHECK IF APPLICATION MEETS THESE REQUIREMENTS (Adapted from Knowles adult learning theory and principles)  | CHECK IF APPLICATION **PARTIALLY** MEETS or **DOES NOT MEET** SUBSTANTIVE REQUIREMENTS AND INCLUDE EXPLANATION |
| --- | --- | --- |
| [ ] 6.80.5.11.E.(2)(g) the proposed designated curriculum is designed to improve governing body Members’ knowledge, skills and abilities to fulfill their statutory duties, comply with all applicable laws, ensure charter schools meet the academic performance expectations of the department and the authorizer [ ]  Not Applicable – School Specific Onboarding | [ ] Participants will know the benefits, values and purposes of the course.[ ] The curriculum includes active and practical participation, implementable techniques and methodologies and provides participants the opportunity to practice/apply new skills.[ ] Participants will draw upon their past experiences to aid their learning, the training is contextualized, and uses language participants are familiar with (plain English). [ ] Learning is supported with appropriate pacing and proportioned delivery techniques that meet the needs of audio, visual, reading/writing, kinesthetic, dependent and independent learning preferences as well as interaction, sharing, activities, and groups. | [ ] Partially Meets  | [ ] Does Not Meet  |
| * The materials, including handouts, agendas, presentation slides, and narrative on pedagogical methods and activities demonstrate the training will not meet one or two of the required adult learning theory and principles listed
 | * The materials, including handouts, agendas, presentation slides, and narrative on pedagogical methods and activities demonstrate the training will not meet three or four of the required adult learning theory and principles listed
 |
| **FOR SCHOOL SPECIFIC ONBOARDING** |
| [ ]  6.80.5.11.E.(2)(g) the proposed designated curriculum is designed to improve governing body Members’ knowledge, skills and abilities to fulfill their statutory duties, comply with all applicable laws, ensure charter schools meet the academic performance expectations of the department and the authorizer [ ]  Not Applicable – Not school specific onboarding | [ ] Partially Meets  | [ ] Does Not Meet  |
| * The materials provided comprehensively address a majority, but not all of the following:
	+ School strategic plan
	+ School contract/material terms and performance framework terms
	+ Board member training and attendance requirements
	+ Board membership, bylaws, code of conduct, committees, and processes
	+ Board mentorship (assigned member mentor)
	+ Board meeting preparation expectations
	+ Pre-membership governing board meeting attendance
	+ School history- including lawsuits and other challenges
	+ Stakeholder introduction – parents, students, teachers, leaders
	+ School policies (including complaint, employee/student handbooks)
	+ School performance (financial, organizational, and academic)

 - including letter grade, NMTEACH, audit, and site visit reports* + School budget and financial reporting – including facility lease review
	+ School leader contract terms and performance evaluations
	+ School enrollment and retention/reenrollment data – and

 school equity (demographic) data | * The materials provided do not address a majority of the topics listed to the left
* The materials address all items listed to the left, but do not do so comprehensively
* The materials provided exclude important information, which result in the information being misleading
 |
| **FOR VIRTUAL TRAININGS ONLY** |
| CHECK IF APPLICATION MEETS SUBSTANTIVE REQUIREMENTS | CHECK IF APPLICATION **PARTIALLY** MEETS or **DOES NOT MEET** SUBSTANTIVE REQUIREMENTS AND INCLUDE EXPLANATION |
| [ ] 6.80.5.11.E.(2)(h) if the training is to be provided virtually, the training includes methods to verify participant engagement throughout the training time period and end the course if participate engagement is not verified. [ ]  Not Applicable | [ ] Partially Meets  | [ ] Does Not Meet  |
| * The proposal identifies a technology that will be used to verify engagement, but there is no technology to end/time out the course
 | * The proposal identifies a technology that will be used to verify engagement and end/time out the course
* The appropriate assurance is not completed
 |
| [ ] 6.80.5.11.E.(2)(h) Virtual training must also include: an assessment of information understanding and retention at the end of training. The assessment must be aligned to the training, shall not be passed with a score below eighty percent, and shall not allow multiple attempts by the participant. [ ]  Not Applicable | [ ] Partially Meets | [ ] Does Not Meet |
| * The proposal includes an assessment, but it is only partially aligned to the training. Major topics/information is not assessed.
* The assessment does not clearly meet the requirement to pass with a score at 80% or greater on the first attempt
 | * The proposal does not include an assessment aligned to the training.
* The appropriate assurance is not completed
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| [ ] Substantively Incomplete  | Date Applicant Notified of Non-Approval: |  |
| [ ] Substantively Complete  | Date Applicant Notified of Approval: |  |
| Applicant eligible to train governance members/bodies in the following hours and topics:[ ]  \_ \_ hours of training on public official/charter school governing body ethics and responsibilities [ ]  \_\_\_ hours of training on charter school fiscal requirements pursuant to the Public School Finance Act, NMSA 1978 § 22-8-1 et seq. [ ]  \_\_\_ hours of training on understanding and evaluating academic data, including state assessment data, school and teacher accountability systems data and interim and summative academic assessment data [ ]  \_\_\_ hours of training on open government and public school access requirements [ ]  \_\_\_ hours of training on understanding and overseeing the organizational performance of a charter school[ ]  \_\_\_ hours of school specific new board member onboarding |

1. 6.80.5.11.D.(3): An applicant who believes their application was erroneously designated as administratively incomplete may submit a written request for reconsideration to the division within 10 Days of the date of notice. [↑](#footnote-ref-1)