



# McCurdy Charter School

## Part B—Progress Report

(A report on the progress of meeting the academic performance, financial compliance, contractual, organizational, and governance responsibilities of the charter school, including achieving the school or mission specific goals, objectives, student performance outcomes, state standards of excellence and other terms of the charter contract, including the accountability requirements set forth in the Assessment and Accountability Act during the Current Charter Term)

### PLEASE NOTE:

Item #1.a and #1.b are not included as material terms of our charter contract, are not a required performance evaluation criteria within the Charter Schools Act, nor are they criteria within our negotiated performance framework measures intended by the parties as the evaluation criteria for our charter's renewal consideration. Further we do not agree that 1.a and 1.b should be evaluated using the rubric for Part B, because no standards have been established by contract nor have standards for meeting these measures been developed and presented as part of the renewal application.

McCurdy Charter School will respond to 1.a and 1.b because we believe the information is relevant for you to understand how our school functions and what work we are doing in these areas. However, by responding, we are not agreeing that this information can or should be used by the Commission to determine whether grounds for nonrenewal exist as enumerated in NMSA 1978, §22-8B-12(K).

## 1. Innovative and Distinctive Education Program

Some of the purposes of the Charter Schools Act are to encourage different and innovating teaching and educational programs that improve student achievement, and encourage parental and community involvement. 1978 NMSA §22-8B-3.

### a. School or Mission Specific Unique, Innovative, and Significant Contributions

The school shall provide a narrative on how the school has fulfilled its mission and how the equity council has influenced any decisions for the 2020-2021 SY. These contributions may include:

1. Teaching methods
2. Measures of student achievement
3. Professional development for teachers
4. Learning programs
5. Encouraging parental or community involvement
6. School's Equity Plan
7. Monitoring students' social emotional and behavioral development

#### *School response:*

##### **HIGHLIGHTS OF UNIQUENESS, INNOVATIONS, SIGNIFICANT CONTRIBUTIONS**

McCurdy is a name that has long been linked to the Española Valley and Northern New Mexico. Established over 100 years ago, McCurdy Schools was operated as a private, tuition-based school. McCurdy welcomed students from all over Northern New Mexico and provided boarding for students that had to travel long distances to receive an education at the school. The McCurdy campus was a vibrant, green space right in the middle of the city. In addition to boarding students, it also housed faculty and even livestock for many years. Students in need often offset their tuition by working on the school grounds and serving the school community.

Over time, however, interest in attending the private school waned and leading up to 2010/11, it became clear that the school would need to consider new and innovative ways to engage with students if it wanted to survive. The solution? Create a public charter school that could embrace the service, character, and leadership tenets of the original McCurdy while providing a free and appropriate public education to any student in the valley. A group of stalwart founders came together to launch McCurdy Charter School, which began operation in 2012. In 2018, McCurdy Charter was able to move into a new building next door to the

original campus, providing a safe and beautiful new space for learning. In the coming years, we plan to expand and/or renovate more of our facilities to provide a state-of-the-art learning and community space.

McCurdy Charter School, like any new school, has had its challenges and victories. We can say with confidence that we are building on our victories and learning from our challenges. Our successes include being accredited by [Cognia](#) (formerly AdvancEd) and we are looking to renew that accreditation this fall.



Over the past several years we have also been working on growing our [AVID](#) (Advancement Via Individual Determination) program, a program that supports college and career readiness, and hope to continue to move the program school-wide in the coming years. We have active students in the [National Honor Society](#) (secondary), [National Dance Institute](#), and student government. Many of our students take dual credit courses and several have participated in internships with Los Alamos National Labs and other universities. We are also one of the largest charters in the state to offer athletics - if not the

largest - and are proud to have Bobcat athletes participating in football, volleyball, basketball, cross country, track, baseball, softball, and cheer. We brought eSports to McCurdy three years ago and our team took home a state championship in the spring of 2021. This year we are adding a golf team to our school and hoping to bring in opportunities to participate in music or choir in the next year to two years.

The McCurdy Charter School mission includes a focus on leadership, community, and service. As such, service learning is a key part of our school. Over the years we have sent thousands of pennies to [Heifer International](#), donated 3-8 family holiday meals every Thanksgiving and holiday season, participated in food drives, service challenges, and Veteran's Day programs, sent in donated eyeglasses, donated blankets, towels, and food to animal shelters, hosted blood drives and vaccine clinics, and served our community in countless other ways. We are continuing to build and refine our service-learning focus, with plans to use service learning in the coming years to work with students to develop outdoor classrooms using federal ESSER/CARES funds.

Here at McCurdy, we know that what happens outside the classroom must compliment what's happening in the classroom. As we move forward, we are working to focus on a renewed investment in [Core Knowledge](#) instruction for grades K-6. Students in these grades use Core Knowledge tenets to develop shared, common knowledge that builds a strong foundation for learning. For students in grades 7-12, we are making plans to deepen investigative learning through continued use of [Paideia](#) (often referred to as Socratic Seminar, but with an increased expectation of writing and investigation) and an expansion into project-based learning centered on inquiry. As part of our efforts to focus on literacy and improve school culture, we partnered with our Teachers and Parents organization (TAP) to bring a book vending machine to our school in the fall of 2021. Students earn a token for a free book when they are recognized for exemplifying Bobcat Pride through

a nomination by a McCurdy staff member. We hope to highlight positive student choices and encourage students to read by providing book selections they will love and treasure.

All students in grades K-12 receive instruction aligned with Common Core/New Mexico Standards and we are increasing our efforts to provide data-driven instruction by providing targeted professional development



and school wide collaboration. One example of the targeted professional development is an investment in [Wilson](#) training for early elementary teachers. Teachers will be able to use time-tested and research-based methodology to help our earliest readers and writers develop strong language skills that support future learning. We are also providing project-based learning professional development for secondary teachers, and training to help elementary teachers better understand and support differentiation. We've got our eye on improved outcomes for English-Language Arts, math, and science and we'll get there by providing high quality and data-driven instruction, rich materials, and well-rounded learning opportunities that focus on the whole person.

Part of our efforts to develop the whole person include established and invaluable partnerships

with others in our community. We are proud to continue to work with Project Cariño, a support service made available through McCurdy Ministries. [Project Cariño](#) provides mental health support for students and staff. We also have developed relationships with Big Brothers/Big Sisters of New Mexico, Enlace, and Española's [Project RACE](#). This year we're bringing [Positive Action Network](#) curriculum and training to our school to help strengthen our social/emotional wellness efforts and provide a school-wide approach to anti-bullying. [Ripple Effects](#) curriculum and resources provide an additional layer of support for social and emotional health. This online program allows students to learn about topics ranging from abuse to leadership to racism either through independent activities or as a larger group supported by a teacher. We have also implemented and are continuing to develop and improve the [McCurdy Points of Pride](#). These seven tenets provide a foundation for the development of our school and students, and a



framework for making decisions and responding to challenges. The MCS Points of Pride are: be committed and intentional; stay centered on student success; think the best about others; work as an engaged member of the team; perform with excellence; be a force that stimulates growth and improvement; and show pride in your school, community and self.

As students work to develop their academic skills and develop their identity as community and world citizens, we need to use tools and programs to measure and support growth and development. We previously used short cycle assessments from NWEA, but after reviewing school needs and reviewing several years of data in congress with our DASH improvement team, we decided to make a shift to an assessment system better aligned to standards. As such, we worked for one year with [Achievement Network](#) to better understand standards based instruction, and at the end of 2021 SY we adopted the [Galileo](#) testing platform from



Imagine



Learning. We used Galileo to establish baseline data from the 2020-21 school year, which we will compare to beginning of the year data in 2021-22. The platform has additional supports available for teachers and students in the areas of reading, math, and science. Teachers will have at-your-fingertip information about student growth and their performance relative to grade level standards. The DASH team will also analyze this data and set goals to

accelerate and improve on our efforts. Rather than focusing on “learning loss”, we choose to see the last year as learning difference. Students **have** been learning, and so has our staff – our goal is to build on the lessons learned, innovate, and accelerate.

The impact of COVID-19 on our world has been staggering, and McCurdy Charter School has been no exception. However, we are proud to say that our staff, students, and community responded with a sense of unity and purpose to the challenges of 2020-2021. We are entering 2021 with a renewed sense of commitment to quality learning experiences and united efforts to keep each other safe. The MCS Equity Council, while a fledgling group, has met to discuss ways we can better support struggling students of all backgrounds and to bring more of our community together with the school as a hub of support and learning. These efforts have been coupled with regular Bobcat Den meetings with the school director and community. These meetings take place monthly before the Governance Board meeting and have provided a forum for families to ask questions, provide feedback, or collaborate to meet school needs. We additionally have a Teachers and Parents (TAP) organization that meets monthly, a Booster Club that supports athletics and

activities, the McCurdy M-Club, and the Friends of McCurdy Foundation. Together these organizations help the school to create a network of support and sounding board for ideas and feedback.

Meeting the needs of a diverse student and staff population can be challenging - there is no doubt. However, McCurdy Charter School staff, students, and families have worked hard to establish a feeling of family, where everyone is welcome and everyone can learn. We are excited to build on and expand those efforts, creating a true community school for the Española Valley and positively impacting our community for at least another 100 years.



## b. Equity and Identity within the Culture of the School including Student Support

This item of the renewal application allows schools the opportunity to include additional information that is not already collected, but that should be considered when making a determination about the renewal of its charter. The school will create a representation that highlights how their school environment is inclusive, reflective of the community, validates students' cultures and identities, and supports all students' sense of belonging.

Note: If your school wishes to display visual art or performance art (such as sculpture, painting, recorded performance or live performance by students), your school will be given no more than 15 minutes at its renewal hearing to present the representation. If a school wishes to submit a narrative, it shall be submitted along with the renewal application.

### **School response:**

***McCurdy Charter School will present a video representation during the 15 minutes at its renewal hearing.***

### **COVID-19 response**

COVID-19 has fundamentally and drastically impacted how we "do school". From how we host meetings, to daily routines, to wearing masks and increasing hygiene and sanitation efforts, McCurdy has worked hard to adapt and respond. In brief, here is a **partial** list of our efforts to flexibly adapt and innovate while keeping students, staff, and the community safe:

- Met with staff to review and implement [a 3-tier response plan](#) pre-closure. This plan was developed before the NMPED required closure of all schools.
- Revised [response protocol](#) upon closure instructions from NMPED.
- Developed plans to provide meals for students and community children during closure. [Grab and go meals](#) continued throughout closure, including summers, until Fall 2021.
- Issued Chromebooks, headphones, and hotspots to students spring 2020 for online learning.
- Developed online learning protocols which allowed students to continue to have face-to-face (although virtual) learning throughout the spring of 2020.
- During summer 2020, met with elementary and secondary teacher groups to plan for instruction fall 2020.
- Developed [re-entry plan](#) for fall 2020.
- Acquired technology to bring MCS students to 1.5: 1 ratio for Chromebooks: students.
- Acquired hotspots, cameras, and other digital tools for teachers.
- Implemented Canvas learning platform for all secondary classes.
- Implemented Google Classroom/Canvas learning platforms for all elementary classes.
- Developed [spring re-entry plan](#) for spring 2021.
- [Revised spring re-entry plan](#) for required return of students on campus.
- Developed protocols for screening staff daily for COVID-19.
- Developed remote work protocols.
- Prepared facilities for re-entry of students, including purchase of protective equipment like desk shields, masks, extra cleaning supplies, sanitation supplies including portable sinks, hand sanitizer stations, and PPE.
- Implemented [weekly communication](#) with families and daily communication with staff throughout the 2020/21 year.
- Provided vaccine clinics in fall 2021.
- Developed reporting protocols for COVID-19 exposure, vaccination, and surveillance testing.
- Implemented new curriculums and resources to support online learning.
- Provided and attended professional development for new learning systems and curriculums including Canvas and other online tools.

These actions, and the many not listed, happened in concert with the day-to-day business of teaching kids – already a more than full time job. The list above does not include the many hours of extra work required to create a whole new way of teaching and learning, connecting, feeding students, and protecting kids. It does not accurately reflect the strain experienced by staff as they were given impossible tasks and still somehow accomplished them. It does not capture the effect of staffing shortages.

However, we are proud to state that MCS staff have been exceptional partners with our community and families. Our staff is working daily to create flexible, dynamic, and supportive learning spaces for students. Teachers learned many new skills they previously thought of as out of reach and are continuing to use those skills in 2021-22. Fall of 2021-22 has been a busy time of coping with the fallout of spending almost 2 years out of school. We are working hard to rebuild communities, reteach behavior expectations, and accelerate learning all while coping with the trauma of a worldwide pandemic, political strife, and constant unpredictability of COVID.

## 1. 2. Academic Performance

The Charter School Act provides as follows:

A charter may be suspended, revoked, or not renewed by the chartering authority if the chartering authority determines that the charter school... failed to meet or make substantial progress toward achievement of student performance standards identified in the charter contract.

### a. School Support and Accountability

**Any school that has not maintained a “C” or better letter grade in SY2017 and SY2018 OR is not identified in the top 75% of all schools in SY2019 and SY2020 on the NM System of School Support and Accountability, must provide a narrative that describes the improvement actions targeted to improve the student outcomes (school/adult/leader/teacher actions) and the success of those actions (student academic successes/improved outcomes).**

Implementation of the described improvement actions should be verifiable through documented evidence at the site including renewal site visit. **Please identify specific evidence of both the school/adult/leader/teacher actions and the student academic successes/improved outcomes in the narrative.**

The narrative should reference performance data that can be reviewed and verified either during the renewal site visit or during the “desk audit” review of the application. If providing data, please attach in Appendix A1 and reference the appendix by name in this narrative. (Appendix A1 – Academic Data)

**Schools that have maintained a “C” or better letter grade in SY2017 and SY2018 and were identified in the top 75% of all schools in SY2019 and SY2020 in the NM System of School Support and Accountability**



**AND have not received a “D” or “F” in any indicator of the state report card during SY2017 and SY2018 do NOT complete this Section.**

***School response:***

As noted in Part A-1a. Department’s Standards of Excellence prepared by the Charter Schools Division, state assessment data is only available for the first two years of the current charter term, 2018 and 2019. McCurdy Charter School’s (MCS) overall score on the 2018 School Report Card was 44.66 out of 100 points. In 2019, MCS earned an overall score of 46.00 out of 100 points on the New Accountability System. Reading and math proficiency rates in 2018 were at 29.0% and 8.0% respectively. 2019 reading, math, and science proficiency rates were 21%, 6%, and 29% respectively.

After reviewing school needs and reviewing several years of data in congress with our DASH improvement team, we decided to make a shift from using NWEA as our short-cycle assessment to an assessment system better aligned to New Mexico’s Standards of Excellence. As such, we worked for one year with [Achievement Network](#) to better understand standards based instruction, and at the end of SY2021 we adopted the [Galileo](#) testing platform from Imagine Learning. We administered the Galileo Assessments to establish baseline data from the end of SY2021, which we have compared to beginning of the year data in SY2022. The Galileo platform has additional supports available for teachers and students in the areas of reading, math, and science. Teachers have at-your-fingertip information about student growth and their performance relative to grade level standards. The DASH team will also analyze this data and set goals to accelerate and improve on our efforts. Rather than focusing on “learning loss”, we choose to see the last year as learning difference. Students **have** been learning, and so has our staff – our goal is to build on the lessons learned, innovate, and accelerate.

Due to the global COVID-19 pandemic, state assessments were not required in the spring of 2020 and were optional in the spring of SY2021. MCS is using baseline data from the end of year Galileo assessments in reading, math, and science. These were administered in the spring of SY2021. The beginning of the year assessments administered in the fall of SY2022 provides additional insights in these three areas and helps us plan for growth and learning needs that can be addressed through federal funds and strategic shifts in instruction or support. Results from both assessment periods for reading, math and science are illustrated in the Chart 1a, 1b, 2a, 2b, 3a, and 3b on the following pages.

*Note: In the charts presented below, multi-colored bars present results for each grade level beginning with the 3<sup>rd</sup> grade level at the top. The bars for each grade level also show the percentage of students “Passing” (right side) and the percentage of students “Not Passing” (left side). Two Student Benchmark Performance Levels are then identified within the “Passing”. The green part of the bar indicates the percentage of students at the “Support” level and the blue part of the bar indicates the percentage of students at the “Enrichment” level. Likewise, two Student Benchmark Performance Levels are also identified for those “Not Passing”. The*

red part of the bar indicates the percentage of students at the “Intervene” level and the yellow-orange part of the bar indicates the percentage of students at the “Monitor” level.

*MCS should not and does not expect students in Beginning of Year (BOY) tests to universally score as “Passing”. Students who take the test to begin the year are coming into new grade level expectations. The purpose of the test data is to plan and provide support based on current grade level proficiencies.*

## READING/ELA

Chart 1a

Galileo Reading/ELA Performance Levels for Grades 3-12  
Spring 2020-2021 End of the Year (EOY)

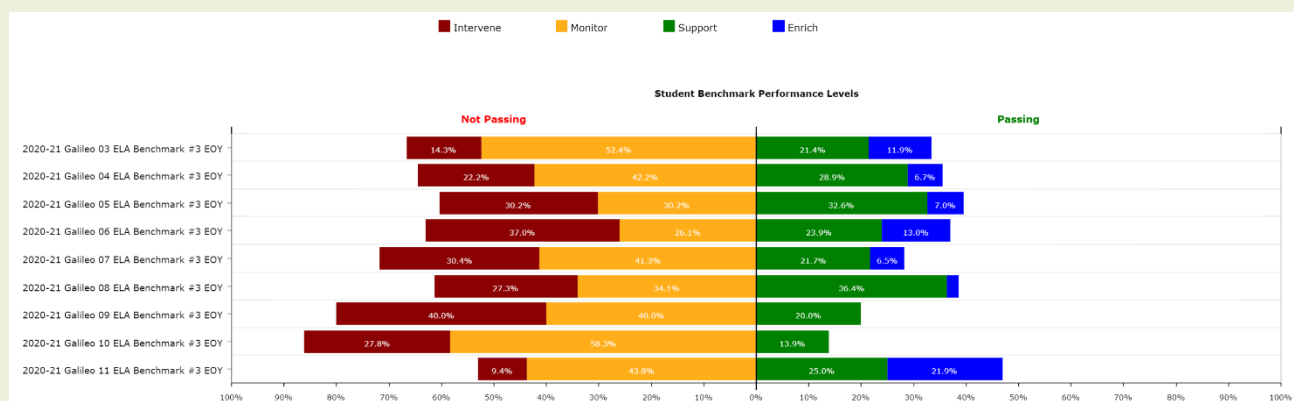
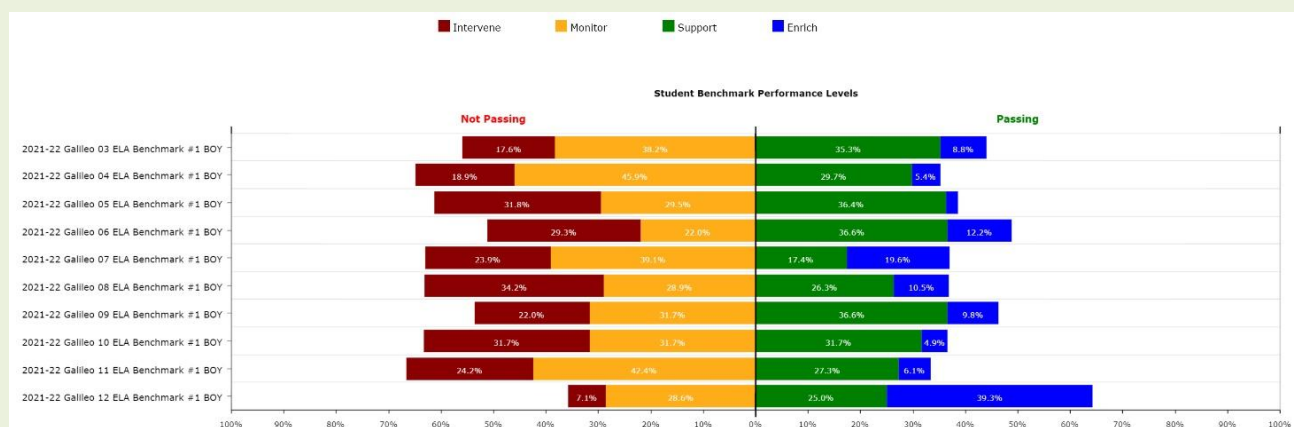


Chart 1b

Galileo Reading/ELA Performance Levels for Grades 3-12  
Fall 2021-2022 Beginning of the Year (BOY)



An analysis of the Galileo Reading/ELA data between the spring end of year administration (**Chart 1a**) and the following fall beginning of year administration (**Chart 1b**), shows that over the summer, the total percent of students “Passing” has increased by the time they entered the next grade level. For example, the overall percent of students “Passing” at the end of 5<sup>th</sup> grade (*Chart 1a - 3<sup>rd</sup> bar from the top*) increased from **39.6%**

(32.6% at the Support level + 7.0% at the Enrichment level) to **48.8%** (36.6% at the Support level + 12.2% at the Enrichment level), **an overall increase of 9.2%** as they became 6<sup>th</sup> graders in the fall (Chart 1b - 4<sup>th</sup> bar from the top). Similarly, the overall percent of “Passing” 10<sup>th</sup> graders increased from **13.9%** to **33.4%** as they moved to the 11<sup>th</sup> grade, **an overall increase of 19.5%**. All other spring scores demonstrate an increase in the percent of students “Passing” Reading/ELA as they move to the next grades in the fall.

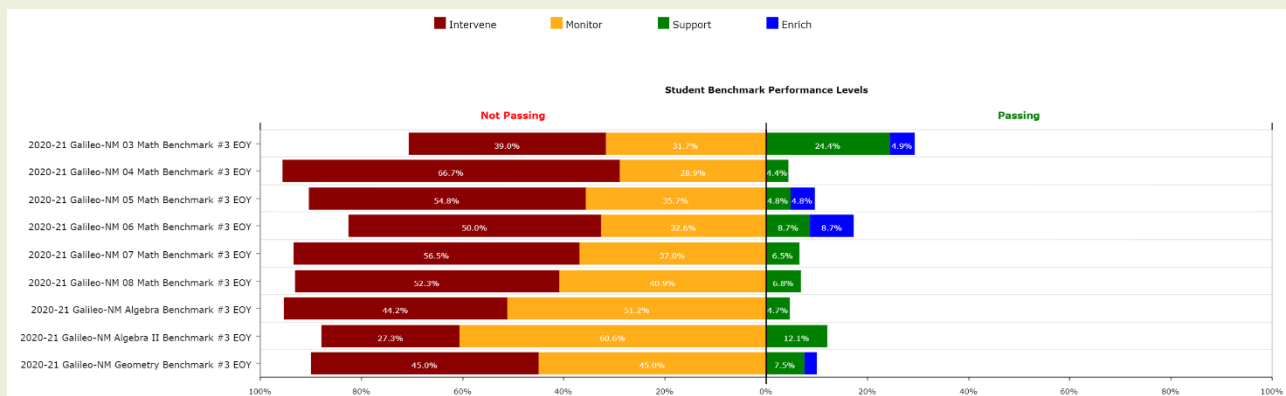
Increases could be attributed to several factors, including end of year learning, growth over the summer (academically and in maturity), re-entry to full in person classrooms where student testing is more closely monitored than testing remotely, and/or instructors providing information about the purpose and importance of the exams.

The following charts for math demonstrate similar increases for all but two grade levels (3<sup>rd</sup> to 4<sup>th</sup> and 8<sup>th</sup> to Algebra). Science performance levels demonstrate gains at all levels assessed.

## MATH

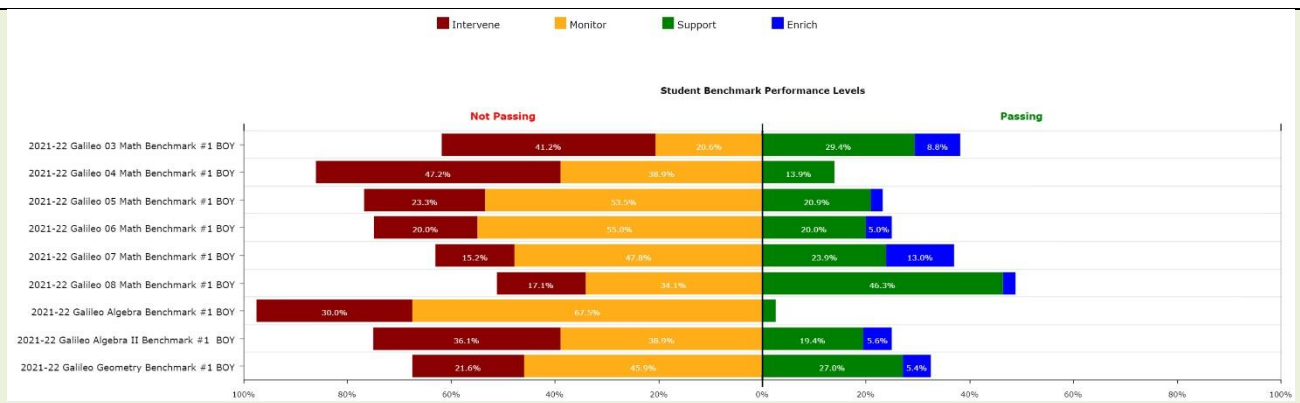
**Chart 2a**

Galileo Math Performance Levels for Grades 3-12  
Spring 2020-2021 End of the Year (EOY)



**Chart 2b**

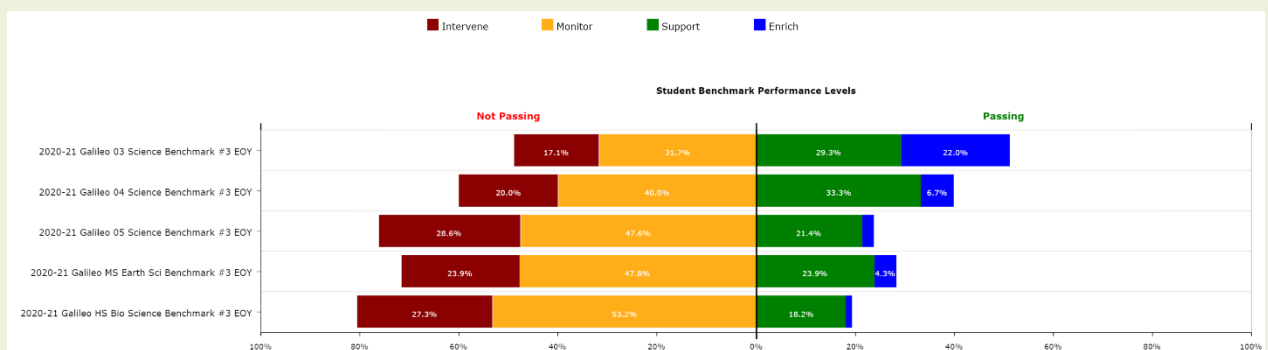
Galileo Math Performance Levels for Grades 3-12  
Fall 2021-2022 Beginning of the Year (BOY)



## SCIENCE

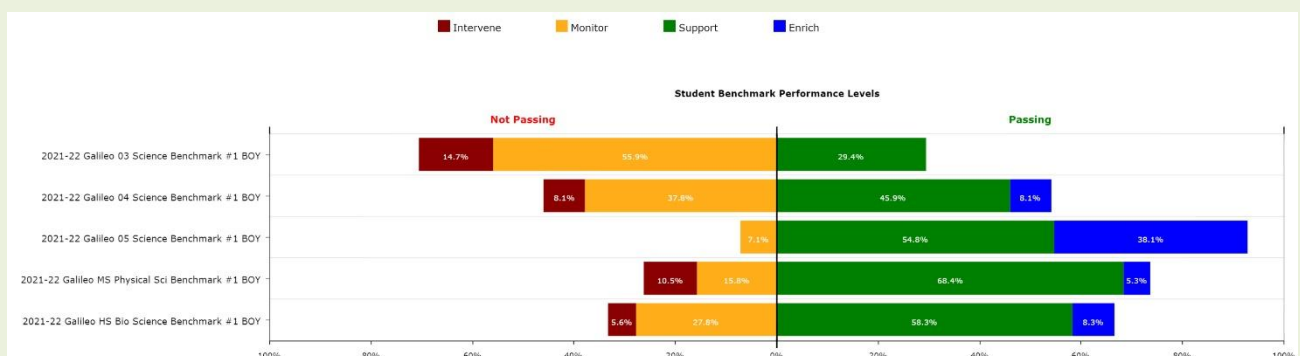
**Chart 3a**

Galileo Science Performance Levels for Grades 3-12  
Spring 2020-2021 End of the Year (EOY)



**Chart 3a**

Galileo Science Performance Levels for Grades 3-12  
Fall 2020-2021 Beginning of the Year (BOY)



McCurdy Charter recognizes the importance of sustained student achievement and is making strides to close the achievement gap and create an environment of trust, respect, and growth. The MCS DASH team has been meeting regularly since the 2018-19 school year. The team is made up of school administrators,

teachers, Governance Board members, and community members. The team has set goals related to standards-based instruction, improving school culture, improving testing environments and using data in instruction, professional development, vertical alignment of instruction and courses, improving attendance and graduation rates, and identifying students in critical need of support.

The DASH team continued to meet even after the disruption caused by COVID-19. This disruption created difficulties for gathering consistent student data and trends. As such, the team increased their focus on school culture and providing supports for students and instructors.

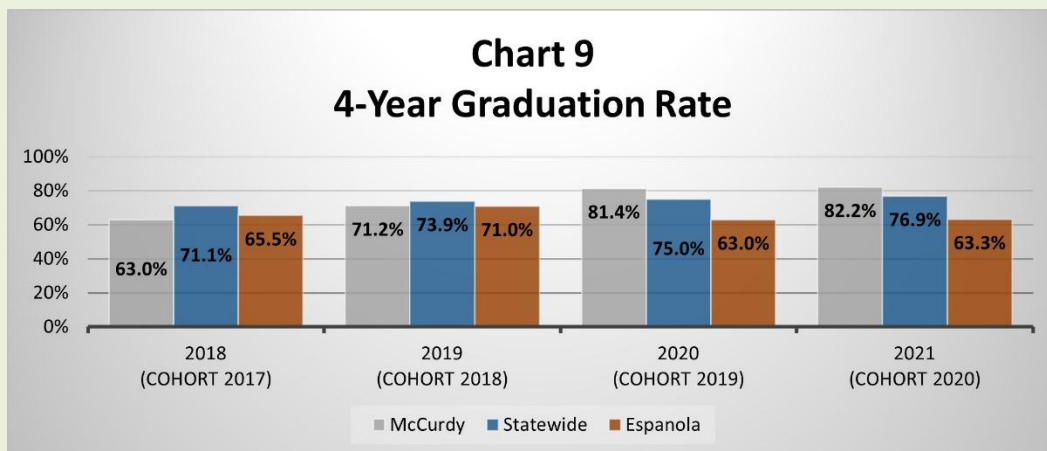
MCS has made significant strides in improving school culture and forging partnerships with the community. A relatively stable enrollment throughout 2020-21 and increased enrollment for 2021-22 is one significant data point. We had greater parent/family participation in virtual board meetings and FAQ meetings. Like most schools, we had difficulties related to attendance during 2020-21, but were able to engage most students daily in learning with certified teachers, even after re-entry. Moving forward, we will be looking closely at data trends and comparing them to pre-pandemic data. We are also planning innovative approaches to secondary scheduling, piloting a 4-semester year that will allow us to offer more student choice in course offerings. We have planned for professional development focused on project-based learning, differentiation, social emotional learning, and special education. The DASH team will be looking closely at subgroups to develop targeted attendance and academic interventions.

[Click here for a summary of the DASH goals and actions since 2018-2019.](#)

Part A-1a. Department's Standards of Excellence also summarizes data on high school graduation rates, college and career readiness, college and career participation and college and career success. For ease of reference and to demonstrate successes at the high school level, the additional charts are included below:

#### High School Graduation Rates for the 4-year cohort

Please note that the data reported each year is for the prior year's cohort of students.



As demonstrated in Chart 9, the 4-year MCS graduation rate has increased each year, from 63% in 2018 to 82.2% in 2021 and has exceeded both the statewide and local district (Española) 4-year graduation rate in 2020 and 2021.



**College & Career Readiness (CCR):** This indicator evaluates the percent of cohort members (high school students' 4th year) who show evidence of college or career preparation, along with the proportion of those students meeting a success benchmark<sup>1</sup>.

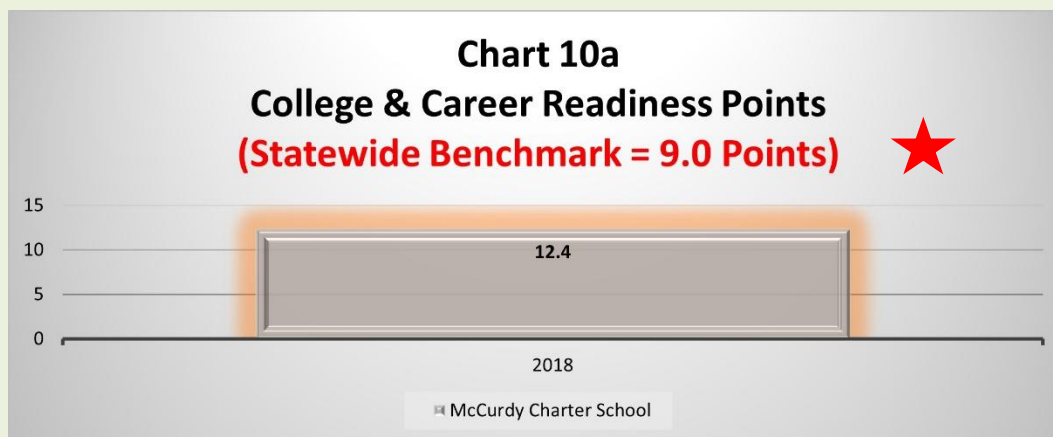
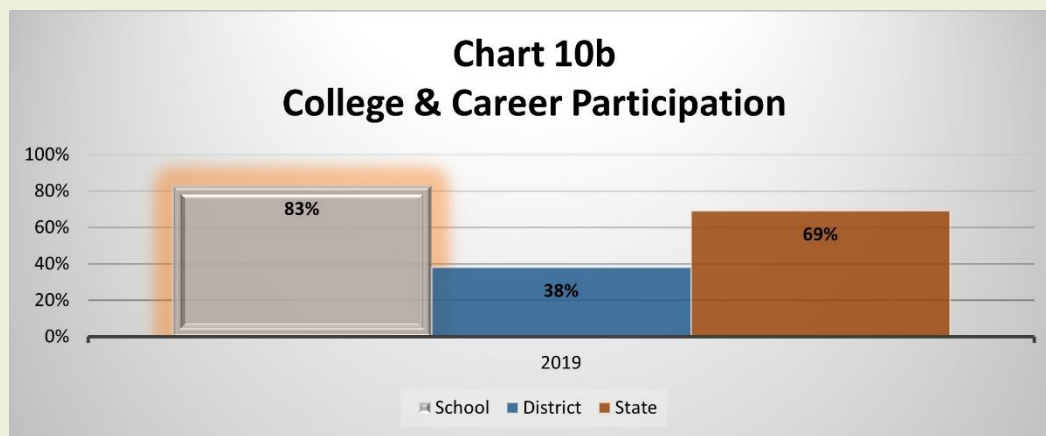


Chart 10a illustrates McCurdy's success in earning 12.4 points out of a total of 15 points thereby exceeding the Statewide Benchmark of 9.0 points.

**College & Career Participation:** High schools are awarded credit when students participate and succeed in college and career readiness (CCT) activities. Such activities include PSAT/NMSQT, SAT, ACT, Concurrent Enrollment/Dual Credit, Advanced Placement, Career Programs of Study, AccuPlacer, COMPASS, IB, TABE, WorkKeys and ASVAB. This measure focuses on whether students participated in such activities.

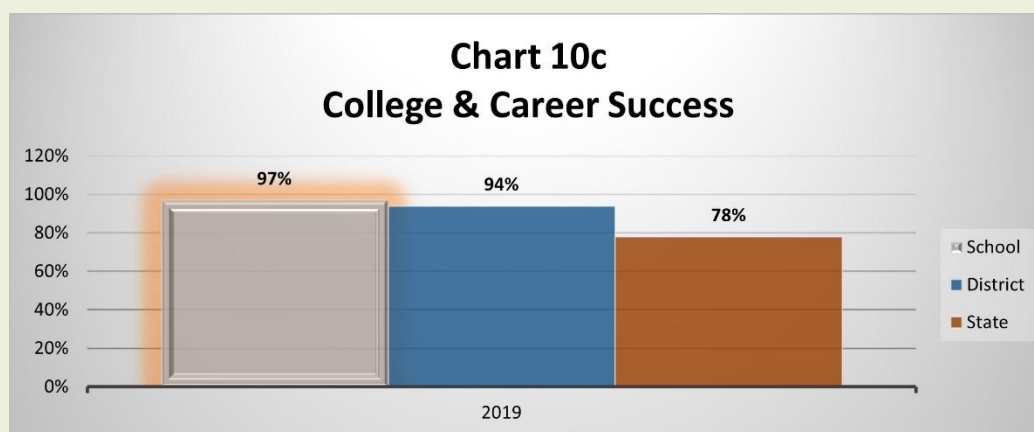


<sup>1</sup> "New Mexico Vistas Technical Guide" document for 2019 at:

<https://webnew.ped.state.nm.us/wp-content/uploads/2020/04/New-Mexico-Vistas-Technical-Guide-SY-2018-19.pdf>

Chart 10b demonstrates McCurdy's success in significantly exceeding both the statewide and local district (Española) College & Career Participation in 2019. McCurdy exceeded the local district's participation by 45 percentage points and state participation by 14 percentage points.

**College & Career Participation:** High schools are awarded credit when students participate and succeed in college and career readiness (CCT) activities. Such activities include PSAT/NMSQT, SAT, ACT, Concurrent Enrollment/Dual Credit, Advanced Placement, Career Programs of Study, AccuPlacer, COMPASS, IB, TABE, WorkKeys and ASVAB. This measure focuses on student success in these activities (as opposed to participation in these activities).



As demonstrated in Chart 10c, McCurdy achieved a 97% college and career success rate and thereby exceeded both the state and local district (Española) rates in college and career success.

Please reference Part A 1.a Department's Standards of Excellence for additional charts regarding English Learners and Subgroup performance.

## b. School or Mission Specific Charter Goals

Pursuant to 1978 NMSA, §22-8B-9.1 each charter school authorizer must allow for the inclusion of additional rigorous, valid and reliable indicators proposed by a charter school in each school's performance framework to augment external evaluations of its performance, provided that the chartering authority approves the quality and rigor of the indicators and the indicators are consistent with the purposes of the Charter Schools Act.

**All applicants must report on each school or mission specific charter goal that is included in the school's performance framework.** Applicants must provide a summary analysis of their performance on each goal over the term of the contract. This analysis must state, for each year of the contract, whether the goal was met and must include longitudinal data that can show the progress of the school over the contract term. For each goal, the applicant should provide a visual representation of the longitudinal data.

**For any applicant that did not meet all of their goals in each year of the contract term**, provide a narrative that addresses the improvement actions (school/adult/leader/teacher actions) targeted to improve the school's performance on that school or mission specific goal and the success of those actions (student academic successes/improved outcomes). The purpose of the narrative is to demonstrate substantial progress toward achieving and maintaining sufficient performance on the school or mission specific goal. The narrative should only address a goal that was not met in each year of the contract term.

Implementation of the described improvement actions should be verifiable through documented evidence at the renewal site visit. **Please identify specific evidence of both the school/adult/leader/teacher actions and the student academic successes/improved outcomes in the narrative.**

The narrative should reference performance data that can be reviewed and verified either during the renewal site visit or during the "desk audit" review of the application. If providing data, please attach in Appendix A2 and reference the appendix by name in the narrative. (Appendix A2 – Mission Goal Data)

**Schools that have met all of their school or mission specific goals in each year of the contract term do NOT provide a narrative.**

### ***School response:***

Mission-specific goals were optional on the 2018 version of the contract. The school elected not to include mission-specific goals. Upon renewal, the school will be required to add mission-specific goals (one minimum; two maximum). In partnership with the Governance Board, school leadership, and the DASH team, we will develop mission-specific goals for the renewal contract.

## 2. 3. Financial Compliance

The Charter School Act provides as follows:

A charter may be suspended, revoked, or not renewed by the chartering authority if the chartering authority determines that the charter school...failed to meet generally accepted standards of fiscal management.

### a. Audit Report Summary

Every charter school is subject to the Audit Act. (1978 NMSA §22-8B-4; 1978 NMSA 22-8-1 *et. seq.*) The Public School Finance Act requires the audit committee of each charter school governing body to track and report progress on the status of the most recent audit findings and advise the local school board on policy changes needed to address audit findings.

Please edit the actual year you are referring to in the table. For example, Year 1 should be changed to the audited year (such as FY16) within the current contract. Also, provide a summary of the nature of findings including category levels. Include and indicate any repeat audit findings involving a material weakness or significant deficiency.

#### Summary of Fiscal Compliance Over the Term of Contract

Audit Year	# of Total Findings	# of Repeat Findings	# of Material Weaknesses and Significant Deficiencies
FY20	6	4	1
FY19	8	3	1
FY18	5	1	5

The figure above was included in Part A of this application. Notable is the decrease in the number of Material Weaknesses and Significant Deficiencies from 5 to 1 over the three-year period represented.

Following are the details of audit findings beginning in chronological order with FY18 through the most recent available audit report of FY20.

Year	Total # of Findings	Nature of Findings including Rating (Compliance, Significant Deficiency, Material Weakness)	School's Corrective Action Plan
FY18	5	<p>2018-001 Internal Control over Cash Receipts (Previously #2014-003) (Significant Deficiency)</p> <p>Condition/Context: During our audit, we noted the following issues during our review of 25 cash receipts:</p> <ul style="list-style-type: none"> <li>2 instances totaling \$5,844 that were</li> </ul>	<p>2018-001 Management's Response: The school went through Business Office and Administrative staff changes throughout all of Fiscal Year 2018. The school experienced struggles with the staff hired, the lack of attention to procedures, and strictly following the internal control</p>

	<p>not deposited within 24 hours as required.</p> <ul style="list-style-type: none"> <li>2 instances totaling \$6,461 which lacked a pre-numbered receipt, and the school lacks a cash receipt log book so we were unable to test for timely deposit of these cash receipts.</li> </ul>	<p>structures in place.</p> <p>The school hired experienced Business Office Staff for FY2019. The school is currently reviewing a new Cash Receipts procedure to assist with the high volume of cash receipts within the school. The new procedure will require that all staff handling cash must be trained by the Finance Director, qualified by testing to handle cash transactions, and sign off on assurances for responsibility and accountability.</p> <p>Implementation: December 31, 2018</p> <p>Persons Responsible: Finance Committee, Administrator, Finance Director</p>
	<p>2018-002 – Internal Control over Athletic and Activity Funds (Material Weakness)</p> <p>Condition/Context: During our review of the activity/athletic funds ending balances and related activity we noted the following issues:</p> <ul style="list-style-type: none"> <li>5 of the 45 activity sub-funds have negative cash in the amount of \$5,527 at June 30, 2018.</li> <li>The athletics fund reports a \$33,279 cash deficit at June 30, 2018.</li> <li>We noted a decrease in athletic revenues of 62% or approximately \$42,000. We also noted a decrease in activity fund receipts of 53% or approximately \$41,000. Management was unable to provide sufficient audit evidence to support these fluctuations. Management did indicate the drop was due to the Gala for athletics, which was not held in February as it has been historically, which raises a significant amount of revenue for the program. We did note an approximate \$25,000 decrease during January and February (including a \$5,440 reclassification due to an error); however, for the months</li> </ul>	<p>2018-002 Management’s Response: The school hired experienced Business Office Staff for FY2019. The school is currently reviewing a new Cash Receipts procedure to assist with the high volume of cash receipts within the school. The new procedure will require that all staff handling cash must be trained by the Finance Director, qualified by testing to handle cash transactions, and sign off on assurances for responsibility and accountability. In addition, the school will also track logs that are kept by the Athletic Director and Club Representatives of the Activities Accounts.</p> <p>Implementation: December 31, 2018</p> <p>Person Responsible: Finance Committee, Administrator, Finance Director</p>



		<p>of July 2017 – December 2017, we noted an approximate 40% decrease in revenues.</p> <ul style="list-style-type: none"><li>● We identified a \$5,440 receipt for an activity in which the related disbursement for the activity was disbursed from the activity fund, yet the receipt from the students for the activity was deposited in the athletics fund, which remains uncorrected.</li><li>● Based on GL coding, we identified approximately \$10,000 in yearbook expenditures, yet only \$2,900 in related receipts.</li><li>● Management disclosed to us and provided a police report to us on November 15, 2018 that an employee in the business office had allegedly stolen a \$447 deposit, which was reported to the police. However, the School did not notify the State Auditor as required.</li><li>● Management disclosed to us that the carbon copy receipt book kept by the business office for receipts of activities and athletics was missing.</li></ul>	
--	--	---	--

		<p>2018-003 Internal Control over Financial Reporting (Partially Previously #2017-003) (Material Weakness)</p> <p>Condition/Context: During our audit, we noted the following issues related to financial reporting:</p> <ul style="list-style-type: none"> <li>● Included as outstanding cash items were approximately \$154,000 in disbursements that represented checks that were cut after year-end and should have been classified as accounts payable, for which an audit reclassification was required.</li> <li>● Included as outstanding cash items were approximately \$143,000 in payroll disbursements that represented ACH items that were processed after year-end and should have been classified as accrued liabilities, for which an audit reclassification was required.</li> <li>● Management is not reconciling the accrued payroll accounts, in which we noted an approximate \$24,000 misstatement that is still reflected in the School's financial statements.</li> <li>● Management did not properly prepare a fund balance roll-forward and reconciliation. As a result, we identified an approximate \$31,000 of prior year audit journal entries that should have been posted to the School's general ledger.</li> <li>● The School's bank reconciliation reflects approximately \$10,000 of invalid outstanding cash items that were outstanding checks from the old system and require management to clean-up these balances to determine if any are still valid or should be canceled.</li> <li>● The School lacks adequate resources to properly close their fiscal year in a timely manner and provide the necessary schedules and documents to the auditors as requested, in order to complete the audit within the scheduled timeline.</li> <li>● The School's prior year financial</li> </ul>	<p>2018-003 Management's Response: The school will provide sufficient resources to make sure that financial reporting is presented in a timely manner to the Finance Committee for review. Finance Committee will establish a checklist of items that will be verified, such as liabilities are reasonably stated and bank reconciliation outstanding items are timely. The school is also considering adopting alternative financial software with better user-friendly reporting characteristics.</p> <p>Implementation: December 31, 2018</p> <p>Person Responsible: Finance Committee with Finance Director</p>
--	--	---	---

		<p>statements reflected approximately \$5,400 in positive fund balance within reimbursement-based funds, which required a reclassification as payable back to the grantor.</p> <ul style="list-style-type: none"><li>• During our review of the budget and actual information, we noted an approximate \$27,000 difference between the OBMS upload and the trial balance provided to us.</li><li>• The School never provided the final PED cash report during the audit.</li><li>• The June bank reconciliation provided contained an approximate \$900 variance compared to the trial balance provided to us.</li></ul>	
--	--	--	--

		<p>2018-004 Internal Control Over Purchasing and Disbursements (Significant Deficiency)</p> <p>Condition/Context: During our audit, we identified the following issues when reviewing 66 disbursements as it relates to the internal controls over purchasing and disbursements:</p> <ul style="list-style-type: none"> <li>• 47 instances in which the purchase included a purchase order, but lacked evidence of proper approval.</li> <li>• 17 instances in which the payment of the invoice was not made until more than 60 days after the due date.</li> <li>• 1 disbursement included sales tax of \$1,321 on purchases for tangible property exempt from NM GRT.</li> <li>• 2 instances in which the PO was exceeded by \$6,031.</li> <li>• Disbursements to a newly established wireless service account for the assistant business manager and 3 other employees. There was no evidence of proper authorization or a policy for this employee to enter into this agreement.</li> <li>• 4 instances of late fees assessed to the School in the amount of \$1,089 for untimely invoice processing.</li> <li>• 8 instances in which the PO was dated after the purchase or no evidence of a PO was provided.</li> </ul>	<p>2018-004 Management's Response: The school will continue to emphasize the importance of following internal controls surrounding purchasing and related disbursements. Finance Director will go over the procedure during a staff in-service, to reinforce the importance of internal controls over purchasing and disbursement, and then have all staff sign assurances for responsibility and accountability.</p> <p>Implementation: January 2019</p> <p>Person Responsible: Finance Director and Administrator</p>
		<p>2018-005 Internal Control over Payroll (Previously #2017-002) (Significant Deficiency)</p> <p>Condition/Context: During our review of 10 personnel files and related salary contracts we noted the following issues:</p> <ul style="list-style-type: none"> <li>• 1 instance in which an employee's contract was amended, however the amendment lacked approval by the school administrator or the employee.</li> <li>• 1 instance in which an employee elected Self + Spouse medical coverage; however, per review of payroll and the NMPSIA website, we noted that the employee was being charged the Self +</li> </ul>	<p>2018-005 Management's Response: The checklist of items to be included in Personnel Files is being reviewed for completeness. A monthly reconciliation process of liabilities is being implemented. Business Office Staff will review Internal Controls over Payroll to ensure compliance.</p> <p>Implementation: January 2019</p> <p>Person Responsible: Finance Director and Finance Committee</p>

		<p>Spouse rate in payroll but his spouse was not actually receiving coverage through NMPSIA.</p> <ul style="list-style-type: none"><li>• 1 instance in which the file lacked evidence of a background check on an employee.</li><li>• 1 instance in which the ERB enrollment form was not maintained in the file.</li><li>• 1 instance in which an employee was receiving additional life insurance, however, only \$33.48 was being charged instead of the rate of \$35.64. This change was never corrected in the system and the employee is no longer with the School.</li><li>• 1 instance in which an employee elected Self + Spouse dental coverage (and Self-Only for medical, vision, and LT disability); however, per review of payroll, we noted that the employee was improperly being charged the Self-Only rate for dental (and properly Self-Only for the other elections) in payroll.</li><li>• During our walkthrough over the 2/9/2018 payroll cycle we noted the payroll register lacked evidence of review by the school administrator.</li></ul>	
--	--	--	--



FY19	8	<p>2019-001 Budgetary Conditions (Other Noncompliance)</p> <p>Condition/Context: During our audit, we noted expenditure functions where actual expenditures exceeded the budgetary authority:</p> <ul style="list-style-type: none"> <li>• Fund 11000 Function: 3000 Non-Instructional \$781</li> <li>• Fund 14000 Function: 1000 Instruction \$3,596</li> <li>• Fund 25153 Function: 2000 Support Services \$10,690</li> <li>• Fund 26113 Function: 1000 Instruction \$1,484</li> </ul> <p>In addition, the following revenue sources were received, but not budgeted:</p> <ul style="list-style-type: none"> <li>• Fund 25145 \$3,780</li> <li>• Fund 25147 \$7,051</li> <li>• Fund 25153 \$30,521</li> <li>• Fund 26113 \$1,484</li> </ul>	<p>2019-001 Management's Response: Management agrees and is working toward best practices. The school had many software difficulties that created issues with not being able to correctly monitor budget. The school will review the budget balances at the end of each quarter with a more vigorous review at year end.</p> <p>Implementation: January 2020</p> <p>Person Responsible: Finance Director</p>
		<p>2019-002 (Original Finding #2014-003) Untimely Cash Receipts (Other Noncompliance)</p> <p>Condition/Context: During our review of 38 cash receipts, we noted 4 cash receipts in the amount of \$11,032 that were not deposited within 24 hours of receipt.</p>	<p>2019-002 Management's Response: Management agrees and is working towards full compliance. The school has many cash receipts on a daily basis and this continues to be a problem. We continue to stress the importance of following our internal controls. We have also implemented the use of a compliance officer to help with monitoring of the cash receipts along with our improved cash controls.</p> <p>Implementation: Immediate and Ongoing</p> <p>Person Responsible: Finance Director, Compliance Director, Administrator</p>
		<p>2019-003 (Original Finding #2018-004) Internal Control over Purchasing and Disbursements (Other Noncompliance)</p> <p>Condition/Context: During our audit, we identified the following issues when</p>	<p>2019-003 Management's Response: Management agrees and are working towards best practices. We have started educating staff on proper use of account coding and procurement regulations to help alleviate this finding. Compliance Officer will also be monitoring controls and spot</p>

		<p>reviewing 72 disbursements as it relates to the internal controls over purchasing and disbursements:</p> <ul style="list-style-type: none"> <li>• 3 instances totaling \$26,644 which were coded in the general ledger to the supply assets account for those assets greater than \$5,000 instead of the account for those assets less than \$5,000. None of these disbursements represented purchases of assets that would require capitalization of the assets.</li> <li>• 3 instances in which the PO was exceeded by \$11,595.</li> <li>• 2 instances in which the PO was dated after the purchase totaling \$12,212.</li> </ul>	<p>checking to make sure that we are in compliance with our controls.</p> <p>Implementation: Immediate and ongoing.</p> <p>Person Responsible: Finance Director</p>
		<p>2019-004 Outstanding Checks over One Year (Other Noncompliance)</p> <p>Condition/Context: During review of the June operating bank reconciliation, we noticed various outstanding checks totaling \$2,572 that are more than one year or older, that should have been cancelled.</p>	<p>2019-004 Response: The school was in the process of changing accounting systems at year end and failed to void the outstanding checks in the system before June 30<sup>th</sup>. The school will monitor more closely in the future.</p> <p>Implementation: Ongoing.</p> <p>Person Responsible: Finance Director</p>
		<p>2019-005 Personnel Files (Other Noncompliance)</p> <p>Condition: During our audit testing over personnel files, we identified 1 of 11 files reviewed that lacked a signed I-9 form.</p>	<p>2019-005 Management's Response: The school continues to work towards having personnel files that are compliant with all regulations. The school has a checklist to help with compliance. We also have a Compliance Officer position that was added in FY20 that will help with random checks of compliance with all statutes.</p> <p>Implementation: Immediate and ongoing.</p> <p>Person Responsible: Finance Director</p>
		<p>2019-006 (Original Finding #2017-003) Internal Control over Financial Reporting (Material Weakness)</p>	<p>2019-006 Management's Response: The prior accounting software that was used did not produce a trial balance as needed for the audit. The</p>

		<p>Condition/Context: During our audit, we encountered numerous issues and delays related to the school's year-end financial reporting and close process:</p> <ul style="list-style-type: none"> <li>• The trial balance for fiscal year 2019 was requested to be provided in early August; however, it was not provided until early October. Other requested audit schedules and documents that were required in October prior to our onsite testing were not provided until late October and early November.</li> <li>• Management failed to identify \$33,544 in year-end accounts receivable balances that required an audit adjustment to properly accrue as of June 30, 2019.</li> <li>• During our review of the payroll accrual, it was identified that the school withheld wage garnishments for an employee totaling \$7,576 during FY18 and an additional \$535 in FY19. During FY18, the school cut warrants totaling \$2,673 to the third party in which garnishments were withheld, leaving \$5,437 still held by the School. Furthermore, the warrants from 2018 are still on the school's bank reconciliation as outstanding items, as they have never cleared. Management is unsure of the status of these garnishments and the accuracy of the withholdings and subsequent payments.</li> <li>• During the course of the year, the bank reconciliations were not being performed in a timely manner. In addition, quarterly PED cash reports were not submitted in a timely manner.</li> <li>• During our receipt testing, we identified a cash receipt in the amount of \$3,200 that was coded to athletic fees instead of a donation/contribution within.</li> </ul>	<p>system provided more of a balance sheet report; therefore, the Trial Balance had to be manually created. This should not happen again as the new system provides a Trial Balance report that works well for the auditors. Accounts Receivable item missed was an error; we will make sure to check for any outstanding SB-9 Funding in addition to our Requests for Reimbursements. The Garnishment issue was being reviewed to make sure that the garnishment has actually been released and we expect a resolution by December. Bank Reconciliations were not completed timely as we had a software issue with balancing caused by accruals in the system. The school is current with reconciliations and PED Cash Reporting. We are also monitoring more closely the cash receipting.</p> <p>Implementation: Immediate and ongoing.  Person Responsible: Finance Committee, Director, Business Manager</p>
--	--	--	--

		<p>2019-007 Internal Control over Manual Timesheets and Leave Requests (Other Matters)</p> <p>Condition/Context: During our walkthrough of the 3/15/2019 payroll packet, we noted the following exceptions:</p> <ul style="list-style-type: none"> <li>One timesheet for 6.5 hours that lacked a signature by the supervisor.</li> <li>Two leave request forms that lacked a signature by the employee.</li> </ul>	<p>2019-007 Management's Response: The school agrees and continues to work towards best practices. The school is reviewing all forms to make sure that all signatures currently required are needed. Management is also having the Compliance Officer review the packets to ensure that we continue to improve.</p> <p>Implementation: Immediate and ongoing.</p> <p>Person Responsible: Finance Director</p>
		<p>2019-008 Untimely Processing and Submission of Reimbursement Requests (Other Matters)</p> <p>Condition: As of June 30, 2019, the school required temporary interfund loans to cover negative cash balances of approximately \$674,000. This is a result of 100% of the school's federal reimbursement-based expenditures that approximate \$269,000 not being drawn down until July 2019, as well as the entire lease assistance award for the year that approximated \$392,000, which was also drawn down in July 2019.</p>	<p>2019-008 Management's Response: Management is in agreement that reimbursements should be done on a more regular basis. The school will request quarterly reimbursements or more frequently if needed.</p> <p>Implementation: January 2020</p> <p>Person Responsible: Finance Director</p>
	FY20	<p>2020-001 Budgetary Conditions (Previously 2019-001) (Other Noncompliance)</p> <p>Condition/Context: During our audit, we noted one expenditure function where actual expenditures exceeded the budgetary authority:</p> <ul style="list-style-type: none"> <li>Fund 22000 Function: 1000 Instruction \$30,665</li> </ul>	<p>2020-001 Management's Response: This was an oversight. Management will check all budgets at least semi-annually for compliance with budgeting.</p> <p>Implementation: January 2021.</p> <p>Person Responsible: Finance Director Consultant/Director</p>
		<p>2020-002 Internal Control Over Purchasing and Disbursements (Previously 2018-004) (Other Noncompliance)</p>	<p>2020-002 Management's Response: Finance Director will work with CPO and Business Office to understand account codes and procurement requirements.</p>

	<p>Condition/Context: During our audit, we identified the following issues when reviewing 66 disbursements as it relates to the internal controls over purchasing and disbursements:</p> <ul style="list-style-type: none"><li>• 1 instance totaling \$5,590 which was coded in the general ledger to the supply assets account for those assets less than \$5,000 instead of the account for those assets more than \$5,000. This purchase did meet the threshold for a capitalized asset and was omitted from the capital asset roll forward.</li><li>• 3 instances in which the PO was exceeded by \$1,310.</li><li>• 3 instances in which the PO was dated after the purchase, totaling \$12,899.</li></ul>	<p>Implementation: Immediately and ongoing.</p> <p>Person Responsible: Finance Director Consultant/Director</p>
	<p>2020-003 Cash Receipts of Athletic Events (Other Matters)</p> <p>Condition/Context: During review of various cash receipts and the related ticket sales reconciliation forms, we observed the following:</p> <ul style="list-style-type: none"><li>• One packet in which the tickets sold section of the reconciliation form was not completed and, depending on the per ticket price, the amount deposited versus projected net ticket sales had a variance of up to \$59. In addition, the \$300 of petty cash received prior to the event was not included in the deposit.</li><li>• One packet in which the tickets sold section of the reconciliation form was partially completed, including the beginning and ending ticket numbers. Depending on the per ticket price, the amount deposited versus projected net ticket sales had a variance of up to \$84, which included the \$250 of petty cash received prior to the event.</li><li>• One packet in which the tickets sold section of the reconciliation form was</li></ul>	<p>2020-003 Management's Response: The School has hired a new Athletic Director for FY2021, and Finance Director Consultant and Director are working on improving all controls for Athletic and Activity Funds.</p> <p>Implementation: Immediately.</p> <p>Person Responsible: Finance Director Consultant/Director</p>



		not completed and, depending on the per ticket price, the amount deposited versus projected net ticket sales had a variance of up to \$84.	
		<p>2020-004 Internal Control Over Payroll (Other Matters)</p> <p>Condition/Context: During our audit testing over personnel files, we identified 1 of 10 employees which the employee was underpaid \$231.25.</p>	<p>2020-004 Management's Response: Finance Director Consultant will prepare an additional report at year-end to make sure that all compensation has been properly paid out.</p> <p>Implementation: Year-end.</p> <p>Person Responsible: Finance Director Consultant/Director</p>
		<p>2020-005 Internal Control over Financial Reporting (Previously 2017-003) (Material Weakness)</p> <p>Condition/Context: During our audit, we identified the following issues related to the financial close and reporting process:</p> <ul style="list-style-type: none"> <li>Approximately \$46,307 incorrectly classified as lunch fees instead of as federal grant revenue related to the USDA National School Lunch Program.</li> <li>The capital asset schedule incorrectly excluded a capital asset in the amount of \$5,590.</li> <li>During our review of the payroll accrual, it was identified that the school has not completely reconciled all amounts in the payroll accrual to determine if there are any amounts that carried over from the old system that need to be adjusted for.</li> </ul>	<p>2020-005 Management's Response: Finance Director will work with staff on account codes and proper coding for deposits. Capital assets will be reviewed at least semi-annually to make sure that they are all accounted for within the schedules. At the end of each year, we will complete a report to make sure that all compensation has been paid out properly.</p> <p>Implementation: Immediately.</p> <p>Person Responsible: Finance Director Consultant/Director</p>
		<p>2020-006 Untimely Processing and Submission of Reimbursement Requests (Previously 2019- 008) (Other Matters)</p> <p>Condition/Context: As of June 30, 2020, the school required temporary interfund</p>	<p>Management's Response: School will ask for reimbursements at least semi-annually and will strive for quarterly, depending upon the amount of the reimbursement. Finance Director will train additional personnel on how to complete an RfR so that there is</p>

		<p>loans to cover negative cash balances of approximately \$450,000. This is a result of 100% of the school's reimbursement-based expenditures that approximate \$271,000 not being drawn down until July 2020, in addition to two quarters of the lease assistance award for the year that approximated \$180,000, which was also drawn down in July 2020.</p>	<p>backup during heavy workloads.</p> <p>Implementation: Immediately – already completed first quarter.</p> <p>Person Responsible: Finance Director Consultant/Director</p>
--	--	---	---

## b. Board of Finance

Pursuant to 1978 NMSA §22-8-38, failure of the governing body of a state-chartered charter school to qualify for designation as a board of finance constitutes good and just grounds for nonrenewal or revocation of its charter.

Further, pursuant to 1978 NMSA §22-8-39, the department may at any time suspend a local school board or governing body of a state-chartered charter school from acting as a board of finance if the department reasonably believes there is mismanagement, improper recording or improper reporting of public school funds under the local school board's or governing body of a state-chartered charter school's control.

When the governing body of a state-chartered charter school is suspended from acting as a board of finance, the department is required to consider commencing proceedings before the Commission to revoke or refuse to renew the charter of the state-chartered charter school.

If the school's **Board of Finance was suspended** at any time during the term of the contract, the school must provide a narrative explaining the actions taken (**school/adult/leader/board actions**) on the school's own initiative to correct financial compliance and regain the Board of Finance Authority and the success of those actions (**improved practices and outcomes**).

The school must also describe the current status of the Board of Finance and continuing actions to ensure the same financial challenges do not reoccur. Success should be identified by specific changes in practice.

The narrative must be supported by evidence to be reviewed and verified at the renewal site visit. **Please identify specific evidence of both the school/adult/leader/board actions and the improved practices and outcomes in the narrative.**

**Schools that have maintained all Board of Finance authority during the entire term of the contract do NOT complete this Section.**

### ***School response:***

McCurdy Charter School maintained all Board of Finance authority during the entire term of the contract.

### 3. 4. Contractual, Organizational, and Governance Responsibilities

The Charter School Act provides as follows:

A charter may be suspended, revoked, or not renewed by the chartering authority if the chartering authority determines that the charter school...committed a material violation of any of the conditions, standards, or procedures set forth in the charter... *or*...violated any provision of law from which the charter school was not specifically exempted.

#### a. Charter Material Terms or Comprehensive Educational Program

Pursuant to 1978 NMSA §22-8B-9, each charter contract must contain material terms of the charter application as determined by the parties to the contract. The PEC's contract identifies all material terms, or in some contract versions, the components of the comprehensive educational program.

If a school received a rating of "working to meet standard" or "falls far below standard" for Indicator 1.a in its Web-EPSS annual report for any year within the contract term, the school must describe the improvement actions the school made to address the deficiencies.

#### ***School response:***

McCurdy Charter School received a "Working to Meet Standard" for school year 2017-18, the first year of the current contract term. Following the school site visit of 02.26.2018, the PED Reviewers indicated the need for additional observable evidence to demonstrate that the school was implementing its mission and material terms as written in the school's charter contract. McCurdy Charter School responded to PED's request for additional information. On 07.28.18 PED finalized the rating in the following statement: "The PED team rated this indicator as Working to Meet Standard because the school has provided the requested evidence and, as a result, has instituted remedies that have resulted in compliance or prompt and sufficient movement toward compliance with law."

McCurdy Charter School has subsequently earned ratings of "Meets Standard" for this Indicator in each of the following PEC Authorized Annual Monitoring Reports (2018-19, 2019-20, 2020-21).

## b. Organizational Performance Framework

Pursuant to NMSA §22-8B-9.1, the performance framework for each charter school must include performance indicators and performance targets for governing body performance, including compliance with all applicable laws, rules and terms of the charter contract.

**For any school that has received a repeated “working to meet standard” rating or any “falls far below standard” rating for one or more of the organizational performance framework indicators on the most recently completed organizational performance framework evaluation** provide a narrative explaining the improvement actions made (school/adult/leader/board actions) to meet all legal compliance requirements and the effectiveness of those actions (improved practices and outcomes) in improving organizational performance and compliance.

The purpose of the narrative is to demonstrate substantial progress toward achieving and maintaining organizational performance and compliance.

Implementation of the described improvement actions should be verifiable through evidence at the site visit. **Please identify specific evidence of both the school/adult/leader/board actions and the improved practices and outcomes in the narrative.**

**If the school has received any Office of Civil Rights complaints, formal special education complaints or NM Attorney General complaints or enforcement action, or**, the school must identify those, provide all communications (redacted to protect PII) related to those complaints in an appendix (Appendix B – Complaint Communications), and describe the current status of the complaint. **If any of those complaints have been resolved and resulted in a finding that the school violated any law**, the school must provide a narrative describing the required compensatory and corrective actions required and their status in implementing those actions. The implementation of such actions must be verifiable through evidence during the renewal site visit.

**Schools that do not have any repeated “working to meet standard” ratings or any “falls far below standard” ratings on the most recent organizational performance framework evaluation do NOT complete this Section.**

### ***School response:***

Organizational Performance Framework Indicators	Concerns Identified	Improvement Actions and the Outcome of those Actions
II-2a through c: Financial Management/Oversight ( <i>identified in the Preliminary 2020-2021 School Performance Report by the Charter Schools Division</i> )	Eight (8) audit findings were listed in the FY19 audit, including one repeated Material Weakness that was repeated again in FY20.	<i>Improvement Actions:</i> The school provided FY19 and FY20 Corrective Action Plans which were approved. New software and programs were put into use for FY20.  <i>Outcome of the Action:</i> It is anticipated that the repeated Material Weakness will not be repeated in FY21.

		<p>During FY20, the school was placed on monthly reporting by the PED School Budget Bureau and those reports were not being submitted in a timely manner.</p>	<p><i>Improvement Action:</i> The school provided a Corrective Action Plan (CAP) that included action steps and deadline dates.</p>
		<p>There are five (5) audit findings for FY20: 2020-001 Repeat Budgetary Conditions; 2020-002 Repeat Purchasing and Disbursements; 2020-003 Cash Receipts deposit; 2020-004 Internal Control over Payroll; and 2020-005 Repeat Internal Control over Financial Reporting (Material Weakness).</p>	<p><i>Outcome of the Action:</i> All reports have been submitted in a timely manner. McCurdy Charter School was returned to quarterly reporting as per a letter dated February 9, 2021 from Eileen Marrujo, Director, School Budget Bureau.</p> <p><i>Improvement Actions:</i> The School Business Official (SBO) provided documentation related to financial management and oversight.</p> <p>Please refer to the Audit Report Summary responses by management for each FY20 finding.</p> <p><i>Outcome of the Actions:</i> It is anticipated that the five findings will not be repeated in the FY21 Audit Report.</p>

### c. Governance Responsibilities\*

Pursuant to 1978 NMSA §22-8B-4, each charter school must, at all times, have at least five members and no members may serve on any other charter school governing body. Further, the governing bodies must operate in accordance with their charter contract and bylaws. The PEC's performance contract requires that the PEC is notified of board vacancies within 30 days, and that vacancies are filled within 45 days.

Additionally, pursuant to NMSA §22-8-12.3, Boards must maintain audit and finance committees that meet statutory requirements.

Further, pursuant to NMAC 6.80.5.8, and 6.80.5.9, each charter school governing body member must annually complete certain hours of approved training.

Finally, governing body members are held to the conflict of interest requirements laid out in NMSA §22-8B-5.2.

**Each school must identify how they have met governance responsibilities during the term of the contract.** Specifically, the school must identify:

- the membership of their boards, at all times, during the term of the contract (with roles and service terms for all members), this should also include membership of the required committees;
- any time when membership on the governing body fell below the requirements in their by-laws or the statutory minimum of 5 members;
- any time when the governing body did not maintain the required committee membership;
- the amount of time any vacancies were open;
- any board members that did not complete required training hours in any of the years of the contract term.

**If the school identified any governance requirements they were unable to meet,** the school must provide a narrative describing the improvement actions the school implemented to move toward full compliance with governance responsibilities.

The purpose of the narrative is to demonstrate substantial progress toward meeting all governance requirements.

The implementation of such actions must be verifiable through evidence during the renewal site visit.

***School response:***

The McCurdy Charter School Governance Board met all governance responsibilities during the term of the charter contract.

The following table identifies the membership at all times, including roles, service terms and required committee membership:

Members 2021-2022	Role(s)	Service Term Begin Date	Service Term End Date	Committee Membership
Chris Martinez	Chair	Active	Active	Policy
Juan Valdez	Vice-Chair	Active	Active	Academic Oversight
Crystal Espinoza	Secretary	Active	Active	Academic Oversight
Nancy O'Bryan	Treasurer	Active	Active	Finance, Audit, Academic Oversight
Adan Trujillo	Member	Active	Active	Policy
Deborah Bennett Anderson	Member	Active	Active	Finance, Audit, Academic Oversight
Members 2020-2021	Role(s)	Service Term Begin Date	Service Term End Date	Committee Membership
Chris Martinez	Chair	Active	Active	Policy
Juan Valdez	Vice-Chair	Active	Active	Academic Oversight
Crystal Espinoza	Secretary	Active	Active	Academic Oversight
Nancy O'Bryan	Treasurer	Active	Active	Finance, Audit, Academic Oversight
Adan Trujillo	Member	Active	Active	Policy



Deborah Bennett Anderson	Member	Active	Active	Finance, Audit, Academic Oversight
Members 2019-2020	Role(s)	Service Term Begin Date	Service Term End Date	Committee Membership
Chris Martinez	Chair	Active	Active	Policy
Juan Valdez	Vice-Chair	Active	Active	Academic Oversight
Anthony Sena	Vice-Chair	Active	Resigned 7/9/19	
Crystal Espinoza	Secretary	Active	Active	Academic Oversight
Nancy O'Bryan	Treasurer	Active	Active	Finance, Audit, Academic Oversight
Adan Trujillo	Member	Active	Active	Policy
Deborah Bennett Anderson	Member	Active	Active	Finance, Audit, Academic Oversight
<i>Note: Anthony Sena resigned from the Board 7/9/19. Juan Valdez became Vice-Chair on 1/23/20.</i>				
Members 2018-2019	Role(s)	Service Term Begin Date	Service Term End Date	Committee Membership
Deborah Bennett Anderson	Chair	Active	Active	Finance, Audit, Academic Oversight
Anthony Sena	Vice-Chair	Active	Active	Policy
Chris Martinez	Secretary	Active	Active	Policy
Nancy O'Bryan	Treasurer	Active	Active	Finance, Audit, Academic Oversight
Crystal Espinoza	Member	7/26/18	Active	Academic Oversight
Adan Trujillo	Member	Active	Active	Policy
Marcie Davis	Member	Active	Resigned 5/2/19	Academic Oversight
Beulah Sandoval	Member	Active	Resigned 3/21/19	Policy
Juan Valdez	Member	Active	Active	Academic Oversight
Members 2017-2018	Role(s)	Service Term Begin Date	Service Term End Date	Committee Membership
Deborah Bennett Anderson	Chair	Active	Active	Finance, Audit, Academic Oversight
Anthony Sena	Vice-Chair	Active	Active	Policy
Chris Martinez	Secretary	Active	Active	Policy
Nancy O'Bryan	Treasurer	Active	Active	Finance, Audit, Academic Oversight
Beulah Sandoval	Member	Active	Active	Policy
Adan Trujillo	Member	3/1/18	Active	Policy
Juan Valdez	Member	3/7/18	Active	Academic Oversight
Marcie Davis	Member	2/8/18	Active	Academic Oversight

- Membership on the governing body met by-law requirements and the statutory minimum of 5

members at all times during the current charter term.

- The governing body maintained the required committee membership at all times during the current charter term.
- No vacancies occurred at all times during the current charter term; Although some members resigned and new members were brought on board, terms overlapped.
- In 2018-19, of the seven (7) seated governing board members, one (1) did not complete the required training hours. An action plan for future Governing Board Training was submitted to the Charter Schools Division through the 2018-19 WebEPSS. In 2020-21 as noted in Part A of this application, all members completed 11.5 hours of training, exceeding the required 8 hours. All other years of training were completed as required.

**\* All schools must provide a response for this section of the application.**