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Part A: Preliminary Data Report and Current Charter Contract Terms

La Tierra Montessori School of the Arts and Sciences

School Address: 659, Rd Runner Rd, Española, NM 87532

Head Administrator: Angel Feathers

Board President: Willie Williams

Business Manager: Mike Vigil II

Authorized Grade Levels: K-8

Mission:

La Tierra Montessori School of the Arts and Sciences will provide students and their families in the Espanola region the opportunity to improve educational outcomes utilizing an integrated approach that includes Montessori, the Arts and the Sciences.

SECTION 1. ACADEMIC PERFORMANCE

State and federal statute mandates accountability for all public schools. In 2011, New Mexico lawmakers enacted requirements that schools demonstrate progress through a grading system similar to that applied to students, A-B-C-D-F. The statute required the governing body of a charter school rated D or F to prioritize its resources toward proven programs and methods linked to improved student achievement until the public school earns a grade of C or better for two consecutive years.

In 2011, New Mexico lawmakers also enacted requirements that each charter school authorizer develop a performance framework to set forth academic performance expectations. The statute requires each charter authorizer to collect, analyze and report all data from state assessment tests in accordance with the performance framework (§22-8B-9.1 NMSA 1978).

Each school in New Mexico has been included in one of two School Grading systems, either for elementary/middle schools or high schools. Although total possible points for either scheme add up to 100 in which points earned determine a school's letter grade, the two grading systems have different point allocations and components. *Charter schools are held to the same standards and calculations as regular public schools.* In addition, schools could earn up to five additional or *bonus* points for reducing truancy, promoting extracurricular activities, engaging families, and using technology. The School Grading Report Card also provided school leaders with information comparing their school to schools with similar student demographic characteristics.

In 2019, New Mexico Public Education Department repealed the A-F School Grading legislation and replaced it with the New Mexico System of School Support and Accountability.

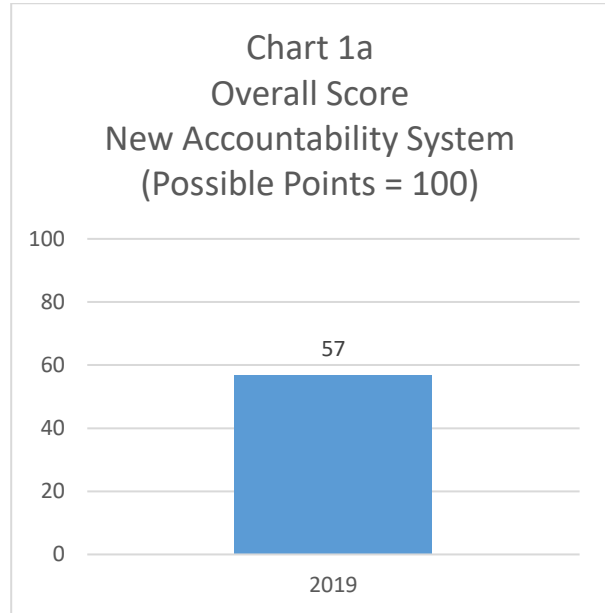
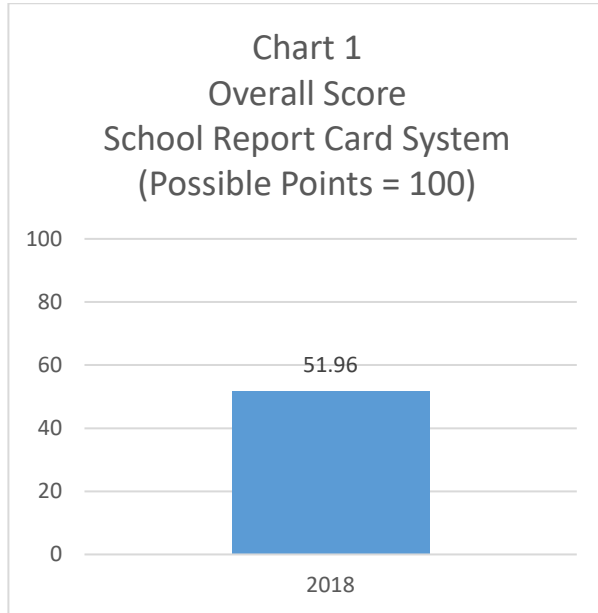
The framework for the New Mexico's system of school support and accountability recognizes that school performance should be assessed within three overarching categories: 1) student academic performance, including graduation rates, 2) student achievement growth, 3) English language proficiency and 4) other indicators of school quality that contribute to college and career readiness.

The following pages provide a snapshot of the school's academic performance, including analysis towards meeting the Department's Standards of Excellence for school years 2017-2018 (under the A-F Grading System) with data was pulled directly from School Report Cards. For 2018-2019, the data from the NM System of School Support and Accountability Reports is also provided.

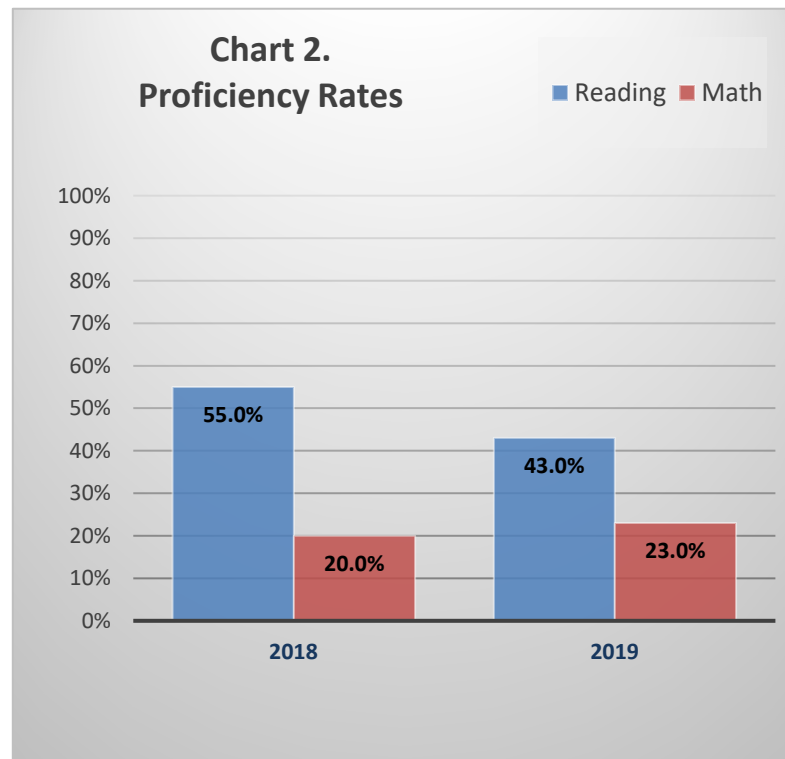
For 2020 and 2021, due to the COVID-19 health emergency school closures in Spring 2020 lasting through 2021, schools were waived from administration of state assessments and were unable to complete other assessments and projects required to meet mission goals. Therefore, state assessment data is not available.

1a. Department's Standards of Excellence

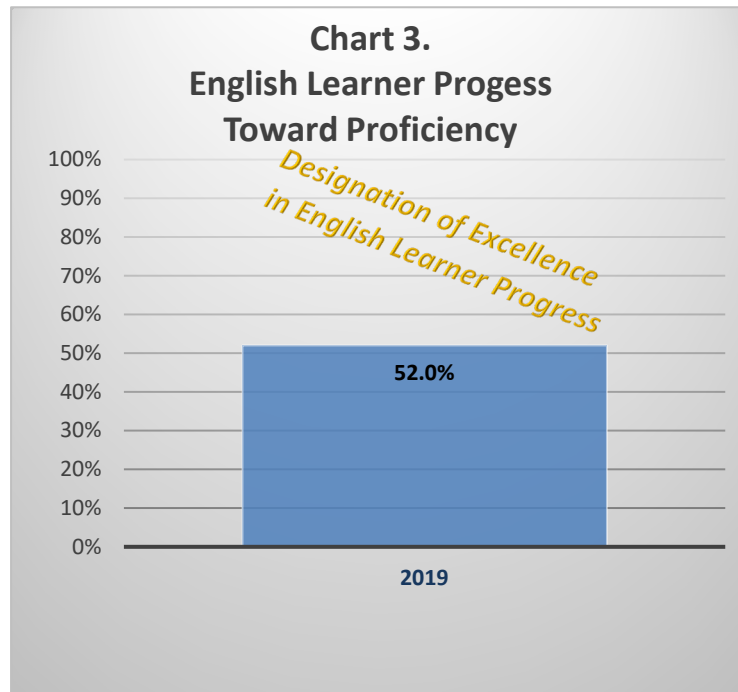
Overall Standing: Charts 1 and 1a illustrate the school's overall score (out of 100 possible points) in each of the years in which state assessment data is available (FY2018-FY2019).



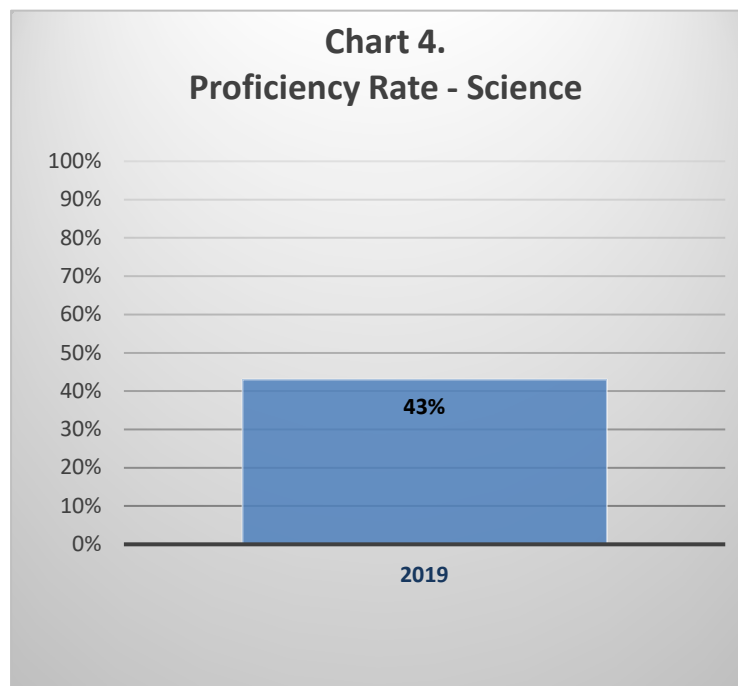
Proficiency Rates: Chart 2 shows the school's proficiency rates in **reading and math** in each of the years in which state assessment data is available (FY2018-FY2019).



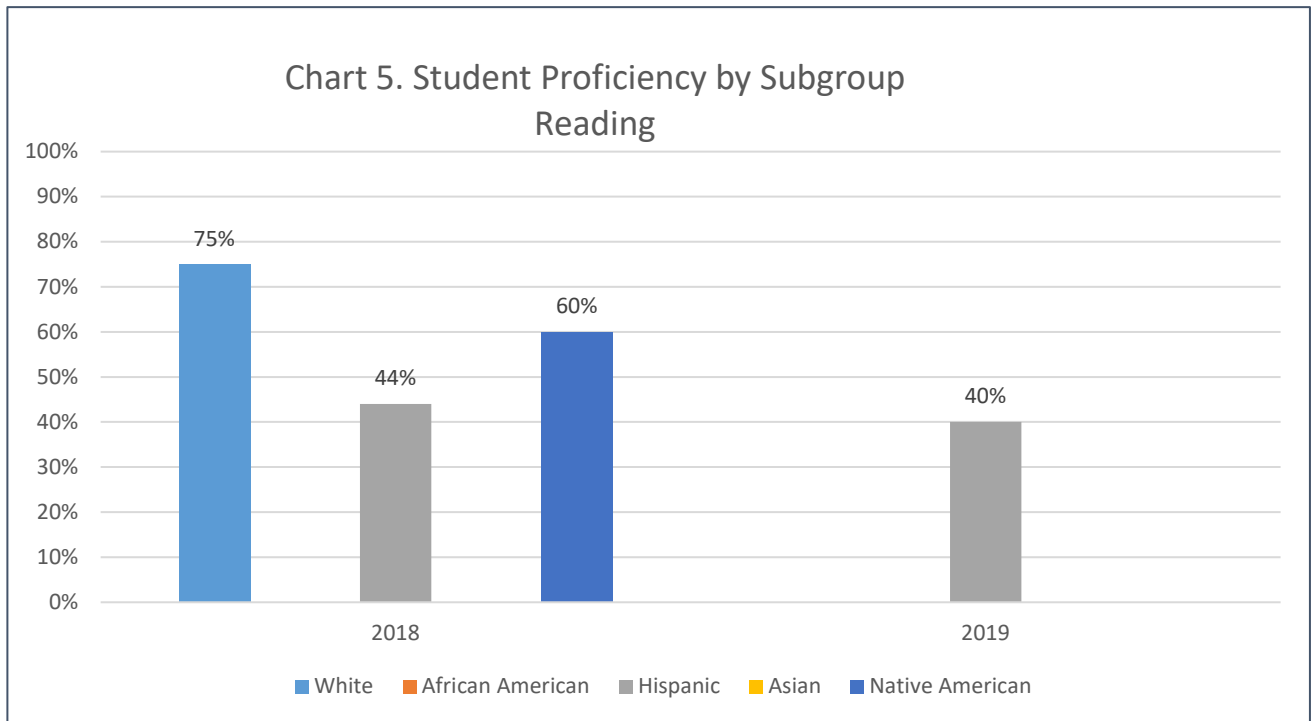
English Learner Progress Toward English Language Proficiency: This indicator was added in 2019 and is measured by the WIDA ACCESS assessment given annually to students identified as English Learners. It is the percentage of English Language Learners who are “on track” to achieve English Proficiency in their fifth year after being identified as an EL.



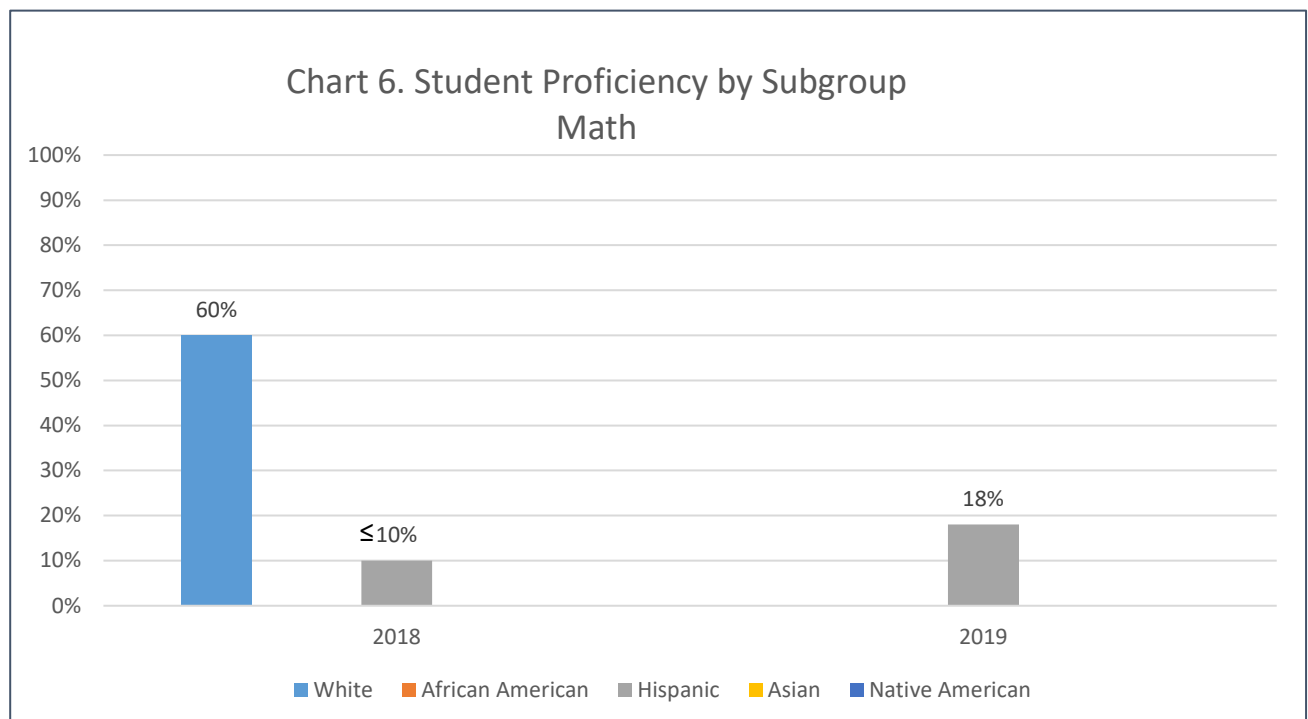
Science Proficiency: This indicator was added in 2019 and Chart 4 indicates the percentage of students who scored at the proficient level on state assessments in science.



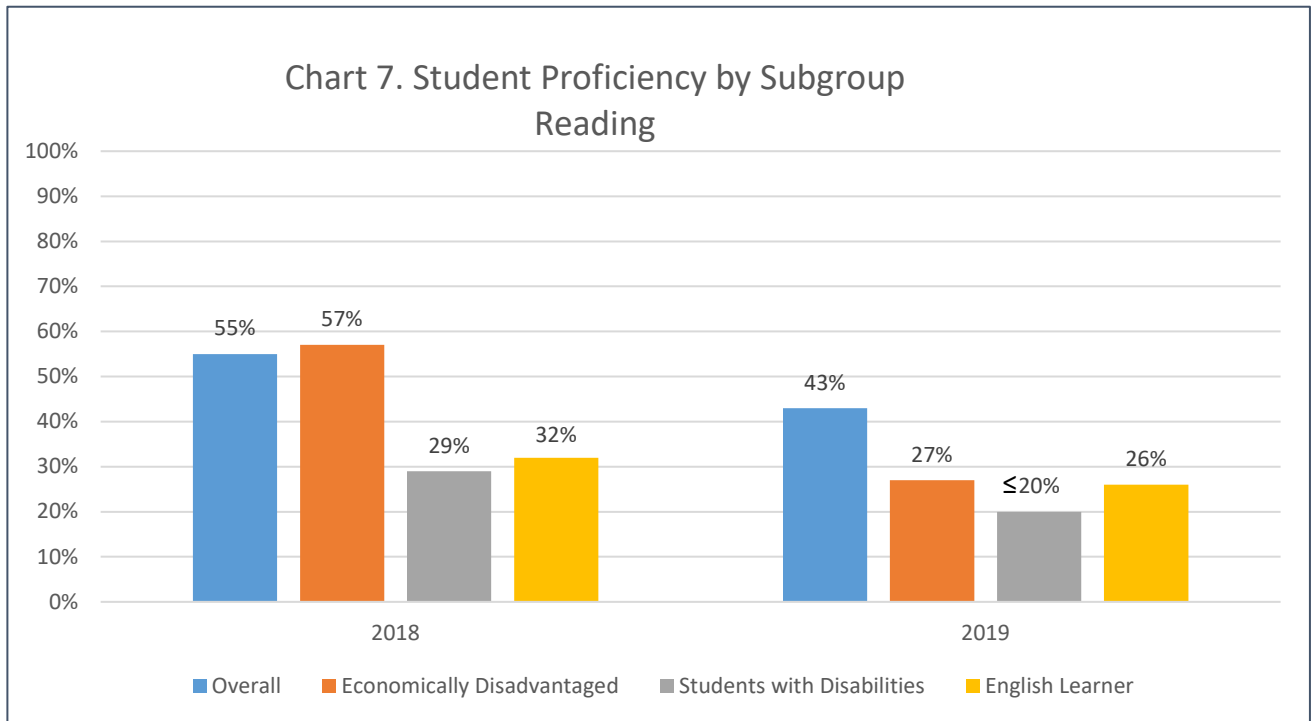
Race/Ethnicity Subgroups - Proficiency in Reading



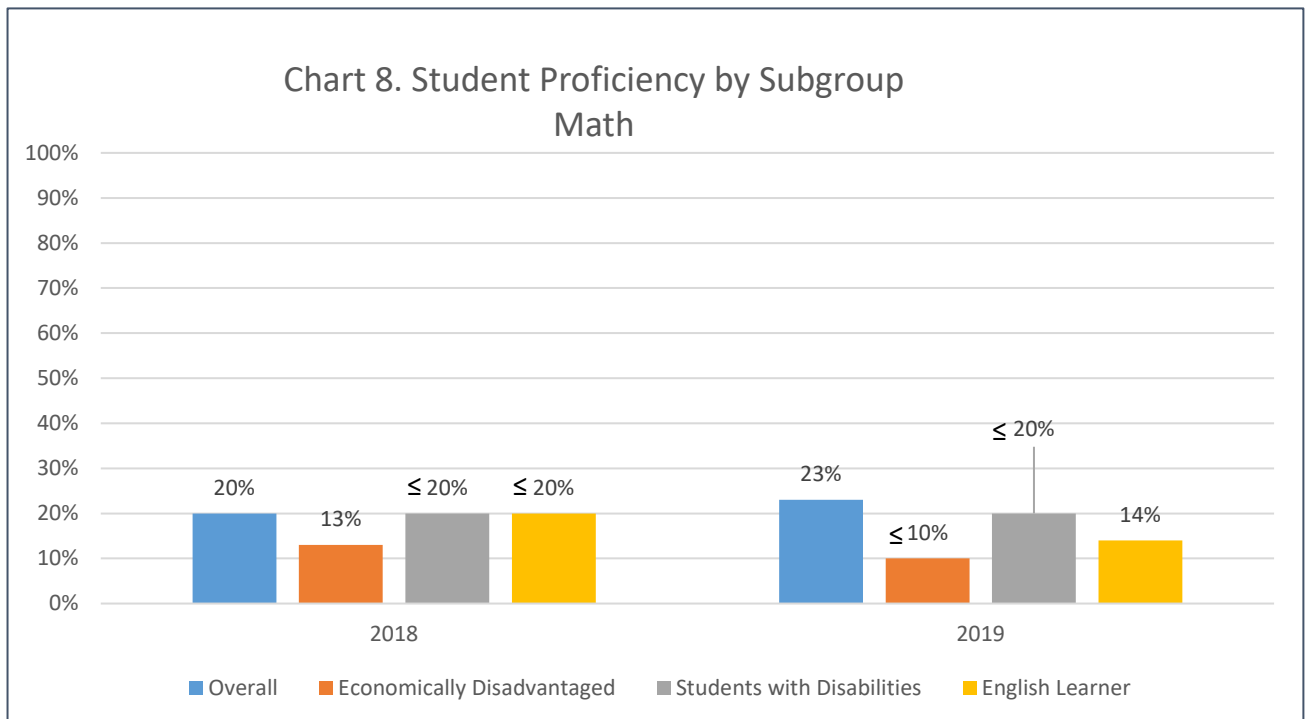
Race/Ethnicity Subgroups - Proficiency in Math



Other Subgroups - Proficiency in Reading



Other Subgroups - Proficiency in Math



1b. Specific Charter Goals

This section includes analysis of the school’s progress towards meeting its Specific Charter Goals or Mission-Specific Indicators.

Charter Specific Goals / Mission Goals

Mission 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 goals (one minimum; two maximum).

Figure 2. Progress towards Charter Specific Goals.¹

	Goal 1	Goal 2
2018	NA	NA
2019	NA	NA

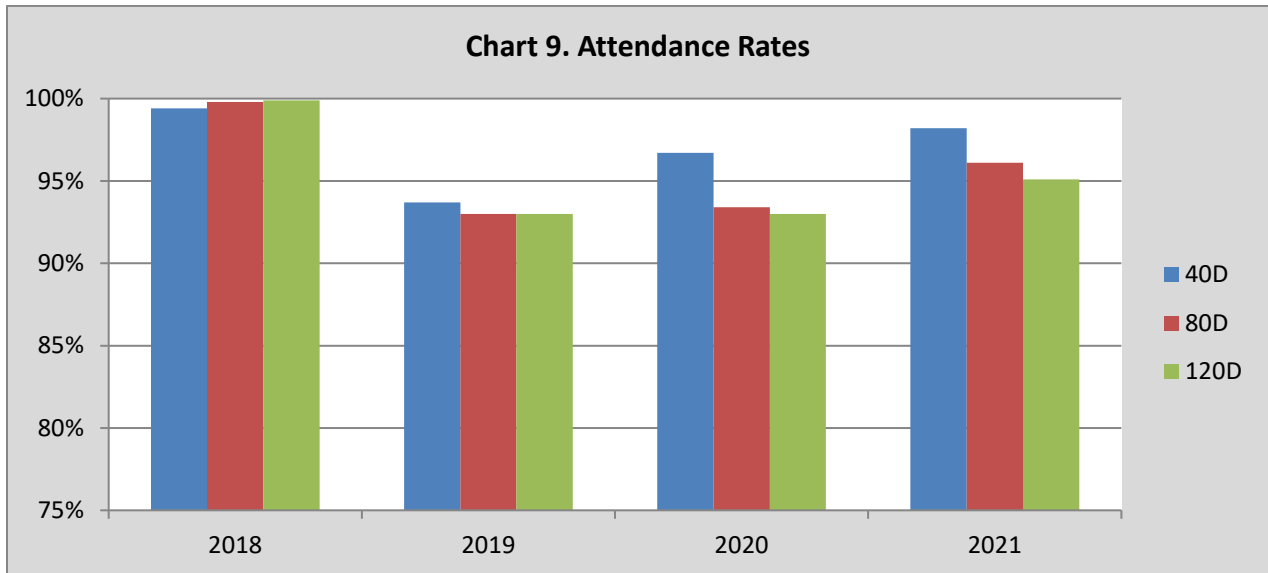
Due to the COVID-19 health emergency school closures in Spring 2020 lasting through 2021, schools were waived from administration of state assessments and were unable to complete other assessments and projects required to meet mission goals. Therefore, data is not available for 2020 or 2021.

¹ Charter Specific Goals are referred to as “Mission-Specific Indicators” or “Performance Indicators” in the school’s contract and performance framework.

1c. Student Attendance and Enrollment

The following information provides a picture of the school’s attendance and truancy, current student membership (enrollment), and enrollment trends over the term of the contract.

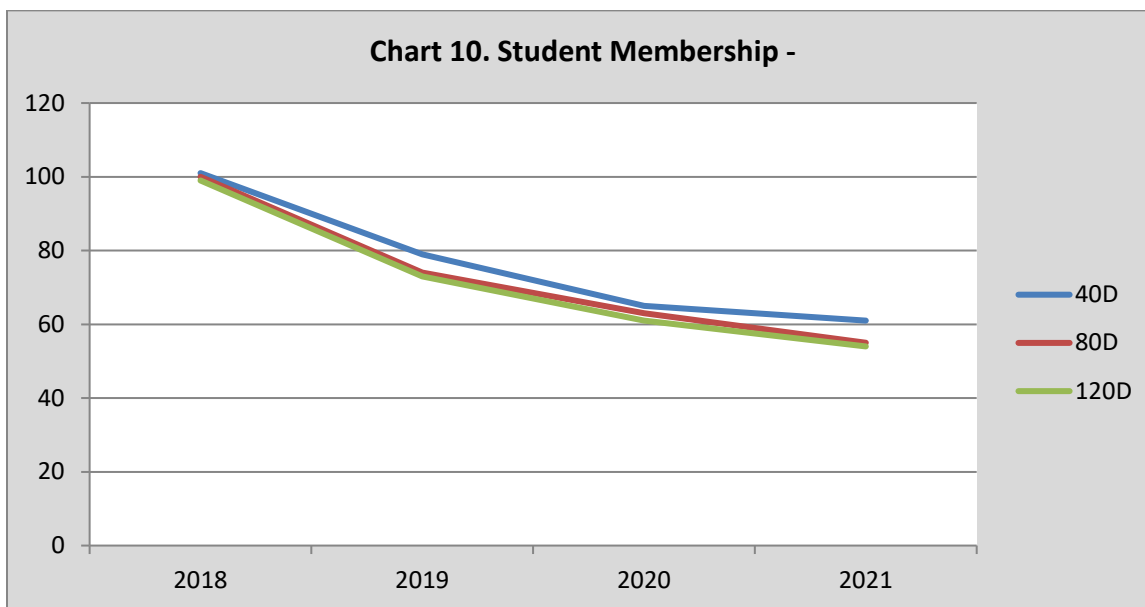
Attendance Rate (The statewide target is 95% or better.)



Source: STARS → District and Location Reports > Template Verification Reports > Student > Student Summary Attendance Summary

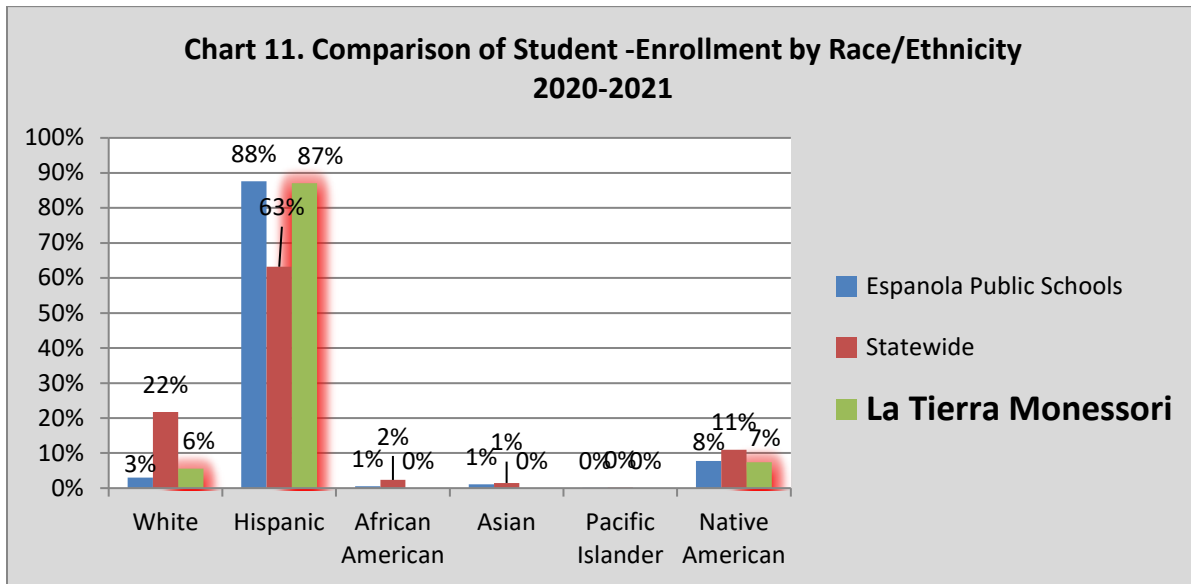
Student Membership (Enrollment)

The chart below shows the school’s student membership for each of the years in operation during the contract term, at each of the reporting windows (40 day, 80 day, and 120 day).



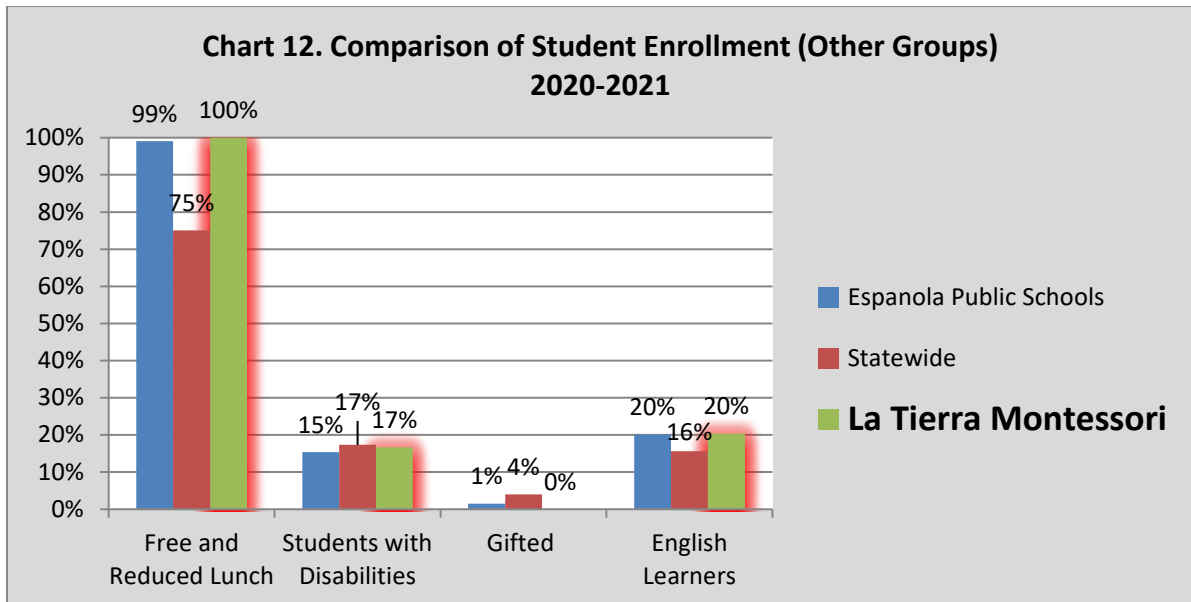
Source: STARS → District and Location Reports → General Reports → Enrollment by district by location by grade

Enrollment by Race/Ethnicity



Source: STARS → District and Location Reports → General Reports → Enrollment Subgroup Percentages with Averages

Enrollment by Other Subgroups

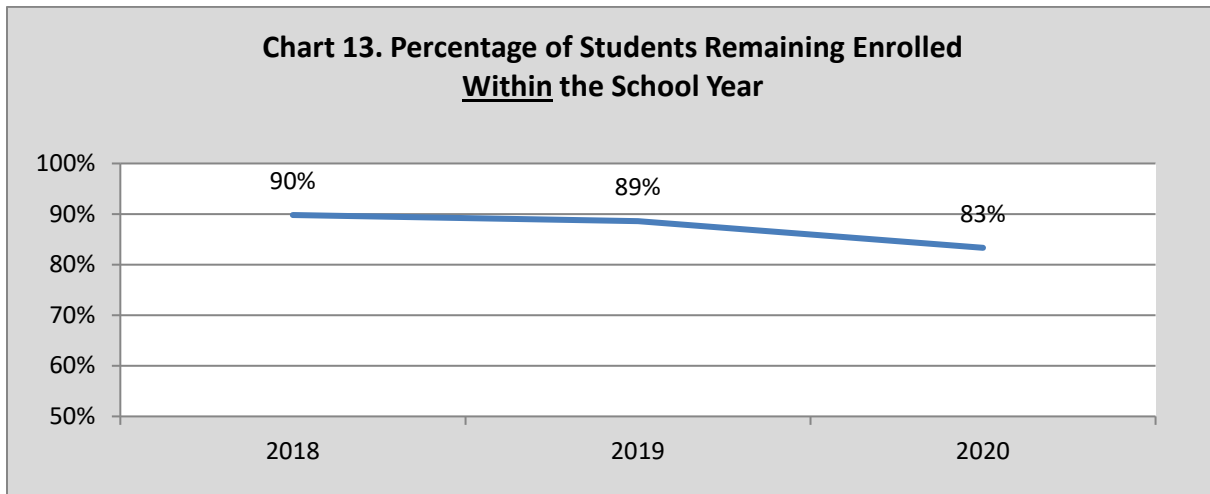


Source: STARS → District and Location Reports → General Reports → Enrollment Subgroup Percentages with Averages

Retention and Recurring Enrollment

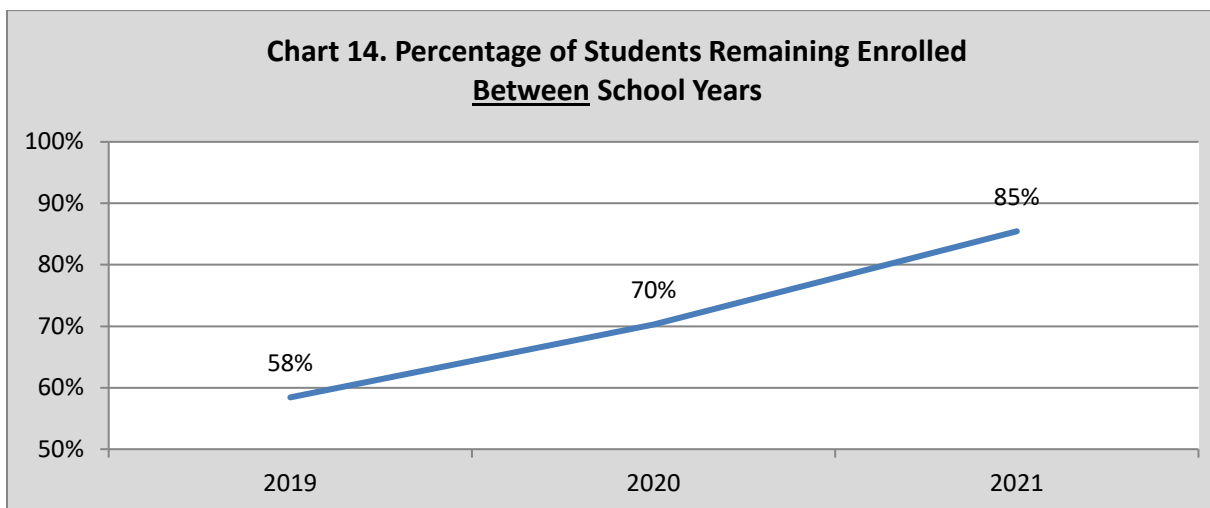
In its Performance Framework, the PEC established student retention expectations. For this school, the PEC established a target of 85% recurrent enrollment between years.

Below, in Chart 13, the PED has calculated within-year retention rates to evaluate the percentage of students who remain enrolled in the school from the time they enroll until the end of the school year. This data is calculated by identifying all students who enroll in the school at any time during the year and then evaluating if the students remain enrolled until the end of the school year. Students whose withdrawal codes indicate circumstances beyond the student's control are removed from the data set.



Source: STARS → District and Location Reports → Options for Parents → Charter School Enrollment Report

To evaluate recurrent enrollment as required by the PEC, the PED has calculated this measure by identifying the students enrolled at the end of each year who are eligible to reenroll (not graduated), and then identifying the students who reenroll on or before the 10th day of the subsequent year. Students whose withdrawal codes indicate circumstances beyond the student's control are removed from the data set.

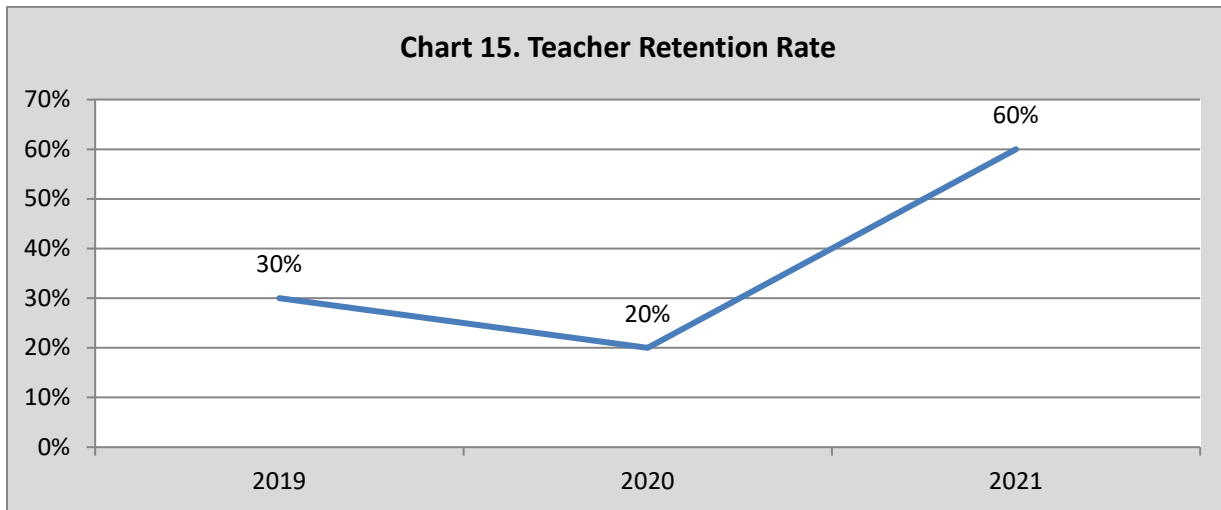


Source: STARS → District and Location Reports → Options for Parents → Charter School Enrollment Report

1d. Teacher Retention Rate

Chart 15 demonstrates the school's retention of teachers over time. This data is calculated by comparing the license numbers for teachers from one year to the next. For example, all teacher license numbers reported for the 2017-2018 school year were compared to teacher license numbers the following year for the same reporting period. The percentage of duplicate license numbers were compared in the second year and the retention rate was calculated based on the percentage of teachers who returned the following year.

The PEC established a goal of 80% teacher retention (lower than 20% turnover) as stated in the performance framework #4d.



Source: STARS → State Reports → Staff Reports → Turnover Rates for Assignment Category (Teachers)

SECTION 2. FINANCIAL COMPLIANCE

2a. Audits

Figure 3. Fiscal compliance over term of contract.

Audit Year	# of Total Findings	# of Repeat Findings	# of Material Weaknesses and Significant Deficiencies
FY20	5	0	1
FY19	1	0	0
FY18	2	0	1

Summary of Most Recent Fiscal Report

In FY20, the school received the following audit finding:

2020-001 Pledged Collateral (Other Noncompliance)

Condition/Context: During our review of pledged collateral, we noted the school did not have any pledged collateral established with its financial institution. This resulted in \$89,632 of funds not being collateralized.

Management's Response: It was found that pledged collateral was not put in place when the bank account was initially opened.

2020-002 Purchasing (Other Noncompliance)

Condition/Context: During testing over 32 cash disbursements, we noted 2 instances which had purchase orders created after the purchase or service took place. These two purchases totaled \$1,324.

Management's Response: Management is in agreement with this finding, which took place under the prior business manager/CPO.

2020-003 Untimely Deposits (Other Noncompliance)

Condition/Context: In testing cash receipts, we identified 1 out of 19 receipts totaling \$800 whose deposit date exceeded the next business day deposit by over a week.

Management's Response: Management is in agreement with this finding.

2020-004 Internal Controls over Payroll and File Maintenance (Other Matters)

Condition/Context: During testing over employee payroll transactions and payroll expense, we identified the following:

- 1 of 5 employee payroll tested in which the timesheet was not signed and authorized by the school administrator.
- 2 of 5 employees' payroll recalculations identified variance in the pay docks recorded to the supporting leave slips. In one instance, the employee payroll appeared to have been overpaid by \$686.82. Another employee payroll resulted in an underpayment of \$115.63.
- 1 of 5 employees whose payroll recalculation did not reconcile to the payroll register for three separate pay periods. One instance in which the hours reported on the timesheet did not agree to the total hours paid, resulted in \$165 overpayment. Two other instances in which an employee was compensated for additional hours, for which the school could not provide a signed contract or agreement in order to review the established hourly rate and scope of work. The school had a three-week hourly rate contract at the start of the year for the employee, which was used for testing purposes assuming the same \$15 hourly rate as no contract was provided. This resulted in an underpayment and overpayment for a net effect of \$22.50 in excess wages paid for the two pay periods.
- While testing ERB expense to the supporting contribution forms, it appeared the general ledger was overstated by approximately \$9,500. It was identified that the expense account entered into the payroll module for health premiums was improperly coded to ERB expense, which resulted in an \$8,438 adjustment to reclassify the expense to the proper expense account.

Management's Response: Management is in agreement with this finding, which took place under the prior business manager/CPO.

2020-005 Internal Controls over Financial Close and Report (Significant Deficiency)

Condition/Context:

- During testing over subsequent disbursements, we identified a disbursement for \$5,000, which was improperly excluded from the school identified accounts payable at June 30, 2020.
- While testing the capital asset rollforward schedule and supporting capital asset listing, we identified the following:
 - The capital asset beginning net book value did not agree to the June 30, 2019 ending balances. This was linked to an error in the date of service, which was a verbal recommendation identified to the school during the FY19 audit but was not corrected.
 - Several versions of the asset listing and rollforward were provided in order to accurately report current year depreciation and accumulated depreciation at June 30, 2020. While recalculating depreciation expense for one of the asset listings submitted, the listing and rollforward reflected \$824 in accumulated depreciation in excess of the asset cost.
 - An asset addition of \$9,635 was improperly placed as a completed asset addition in FY20; yet, at the conclusion of the audit, some remaining equipment had yet to be received. In addition, final assembly is required in order for the asset to function in its intended use and thus should have been recorded by the school as construction in progress at fiscal year-end.

Management's Response: Subsequent disbursement was excluded due to an oversight and immaterial. Business Manager was unaware of item not identified in FY18 with the change in business managers and the prior business manager handling the asset schedule during the FY19 audit. Recalculations of depreciation were done upon identification of this.

2b. Board of Finance

The school's Board of Finance was never suspended during the term of its contract.

SECTION 3. CONTRACTUAL, ORGANIZATIONAL, AND GOVERNANCE RESPONSIBILITIES

3a. Educational Program of the School

- i. Montessori methods and materials that address the education of the whole child will be utilized as an approach to instruction. The school will use Montessori instruction in multi-age groupings with teachers who are trained in Montessori curriculum and practices. Self-directed Montessori materials designed for hands-on learning are a part of each child's experience in every classroom.
- ii. Students receive visual arts and performing arts instruction weekly that is aligned with grade-level appropriate New Mexico State Standards.
- iii. Students participate in an agricultural curriculum which complements classroom instruction and offers opportunities for hand-on learning in the school's greenhouse and gardening plots. This part of the school's instructional plan lends itself to studies of health, environment, resources sustainability and community involvement.
- iv. Parents have many opportunities to participate at school and in school-related events such as the following:
 - a. "Family Nights" to inform parents of the Montessori philosophy and instructional practices being used at the school and how these can be reinforced at home.
 - b. Activities that showcase student learning for their families and involved community members.

3b. Organizational Performance Framework

La Tierra Montessori	2017-2018	2018-2019	2019-2020	2020-2021
Category I. Academic Performance Framework				
Indicator 1 Components of School Accountability System	Falls Far Below (or Does Not Meet) Standard	56.71 Points (Spotlight)		Unable to Review - COVID
Indicator 2 Subgroup Performance	Not Applicable	Pending		Unable to Review - COVID
Indicator 3 Mission Specific Goals	Not Applicable	Not Applicable		Not Applicable
Financial Performance Framework				
Self-Assessment Survey completed and signed by Head Admin, SBO, and Finance Chair	Meets (or Exceeds) Standard	Meets (or Exceeds) Standard	Meets (or Exceeds) Standard	Not Applicable
Category II. Organizational Performance Framework				
Indicator 1a Educational Program: mission and educational program of approved charter application	Working to Meet Standard	Meets (or Exceeds) Standard	Meets (or Exceeds) Standard	Meets (or Exceeds) Standard
Indicator 1b Educational Program: state assessment requirements	Meets (or Exceeds) Standard	Meets (or Exceeds) Standard	Meets (or Exceeds) Standard	Unable to Review - COVID
Indicator 4a Students & Employees: protecting the rights of all students	Meets (or Exceeds) Standard	Meets (or Exceeds) Standard	Does Not Meet Standard	ASSURANCES
Indicator 1c Educational Program: protecting the rights of students with disabilities	Meets (or Exceeds) Standard	Working to Meet Standard	Meets (or Exceeds) Standard	Meets (or Exceeds) Standard
Indicator 1d Educational Program: protecting the rights of English Language Learners	Working to Meet Standard	Working to Meet Standard	Does Not Meet Standard	Meets (or Exceeds) Standard
Indicator 4b Students & Employees: attendance, retention, and recurrent enrollment	Meets (or Exceeds) Standard	Working to Meet Standard	Not Applicable	Meets (or Exceeds) Standard
<i>Included in Indicator 4b</i>	Working to Meet Standard			
Indicator 2a Financial Mgmt & Oversight: meeting financial reporting and compliance requirements	Working to Meet Standard	Working to Meet Standard	Working to Meet Standard	Working to Meet Standard
Indicator 2b Financial Mgmt & Oversight: following generally accepted accounting principles	Meets (or Exceeds) Standard	Falls Far Below (or Does Not)	Meets (or Exceeds) Standard	Does Not Meet Standard
Indicator 3a Governance & Reporting: complying with governance requirements	Meets (or Exceeds) Standard	Meets (or Exceeds) Standard	Meets (or Exceeds) Standard	Meets (or Exceeds) Standard
<i>Included in Indicator 3c</i>	Meets (or Exceeds) Standard			
Indicator 4c Students & Employees: meeting teacher and other staff credentialing requirements	Meets (or Exceeds) Standard	Falls Far Below (or Does Not)	Meets (or Exceeds) Standard	Meets (or Exceeds) Standard
Indicator 4d Students & Employees: respecting employee rights	Meets (or Exceeds) Standard	Meets (or Exceeds) Standard	Working to Meet Standard	ASSURANCES
Indicator 4e Students & Employees: completing required background checks / reporting ethical violations	Meets (or Exceeds) Standard	Meets (or Exceeds) Standard	Working to Meet Standard	ASSURANCES
Indicator 5a School Environment: complying with facilities requirements	Meets (or Exceeds) Standard	Meets (or Exceeds) Standard	Meets (or Exceeds) Standard	ASSURANCES
Indicator 5c School Environment: complying with health and safety requirements	Meets (or Exceeds) Standard	Meets (or Exceeds) Standard	Working to Meet Standard	ASSURANCES
Indicator 5d School Environment: handling information appropriately	Meets (or Exceeds) Standard	Meets (or Exceeds) Standard	Meets (or Exceeds) Standard	ASSURANCES
OTHER				
School specific conditions in the Charter Contract, if any	Not Applicable			
Indicator 1e Educational Program: meeting program requirements for all PED and federal grant programs		Meets (or Exceeds) Standard	Meets (or Exceeds) Standard	ASSURANCES
Indicator 1f Educational Program: NM DASH Plan		Not Applicable	Not Applicable	Unable to Review - COVID
Indicator 2c Financial Mgmt & Oversight: responsive to audit findings		Working to Meet Standard	Working to Meet Standard	Meets (or Exceeds) Standard
Indicator 2d Financial Mgmt & Oversight: managing grant funds responsibility		Meets (or Exceeds) Standard	Meets (or Exceeds) Standard	Meets (or Exceeds) Standard
Indicator 2e Financial Mgmt & Oversight: staffing to ensure proper fiscal management		Working to Meet Standard	Working to Meet Standard	Meets (or Exceeds) Standard
Indicator 2f Financial Mgmt & Oversight: meeting obligations timely / appropriate internal controls		Not Applicable	Not Applicable	Meets (or Exceeds) Standard
Indicator 3b Governance & Reporting: complying with nepotism and conflict of interest requirements		Meets (or Exceeds) Standard	Meets (or Exceeds) Standard	ASSURANCES
Indicator 3c Governance & Reporting: meeting obligations timely / appropriate internal controls		Meets (or Exceeds) Standard	Meets (or Exceeds) Standard	ASSURANCES
Indicator 5b School Environment: complying with transportation requirements		Not Applicable	Not Applicable	ASSURANCES

3c. Governing Body Performance

The school has eight (8) members serving on their Governing Body.

Figure 7 lists the information provided to the PED regarding the members who are currently serving on the school's Governing Body.

Board Member Name	Position	Training Hours Completed	Training Hours Required
Amy Larsen	Chair	19.5	8
Willie Williams	Vice Chair	11.5	8
Lynette McLean		14.5	8
Brenda Atencio*	Secretary	11.5	8
Alberto Mares*		10.5	8
Tara Voit*		10.5	8
Isaac Casados*		10	8
Chris Baca*		14.5	8

Figure 7. Current governing council members

* These members did not complete all hours in each of the required training categories.