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Part A: Preliminary Data Report and Current Charter Contract Terms

MCCURDY CHARTER SCHOOL

School Address: 515 Cam Arbolero, Espanola, NM 87532

Board President: Chris Martinez

Head Administrator: Sarah Tario

Business Manager: Deanna Mooney

Authorized Grade Levels: K – 12 – enrollment CAP of 584

Mission: The mission of the McCurdy Charter School {MCS} is to provide a safe learning environment for the students of Northern New Mexico: an environment that recognizes that education is rooted in academic excellence and achievement, character development and awareness, and community engagement and leadership.

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In 2019, New Mexico Public Education Department repealed the A-F School Grading legislation and replaced it with the New Mexico System of School Support and Accountability.

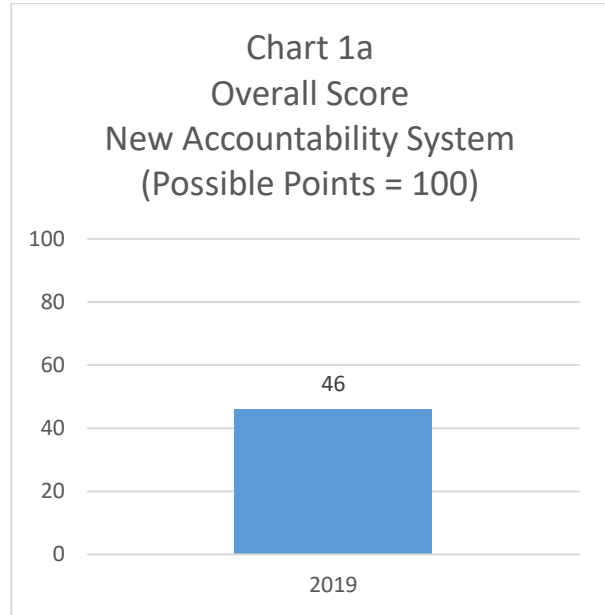
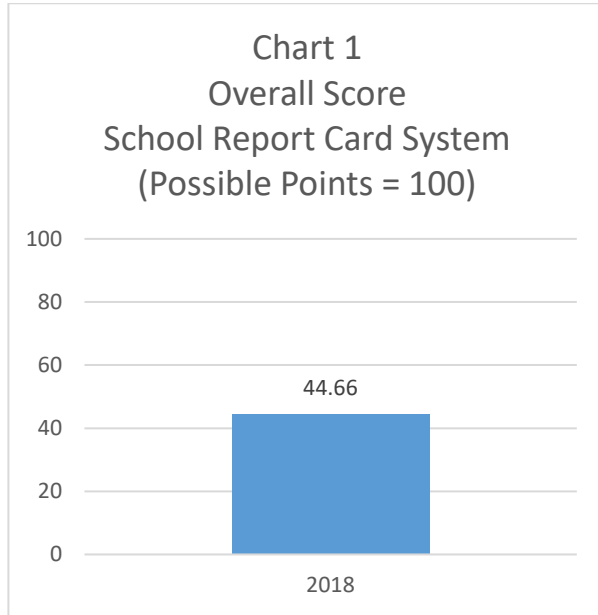
The framework for the New Mexico's system of school support and accountability recognizes that school performance should be assessed within three overarching categories: 1) student academic performance, including graduation rates, 2) student achievement growth, 3) English language proficiency and 4)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

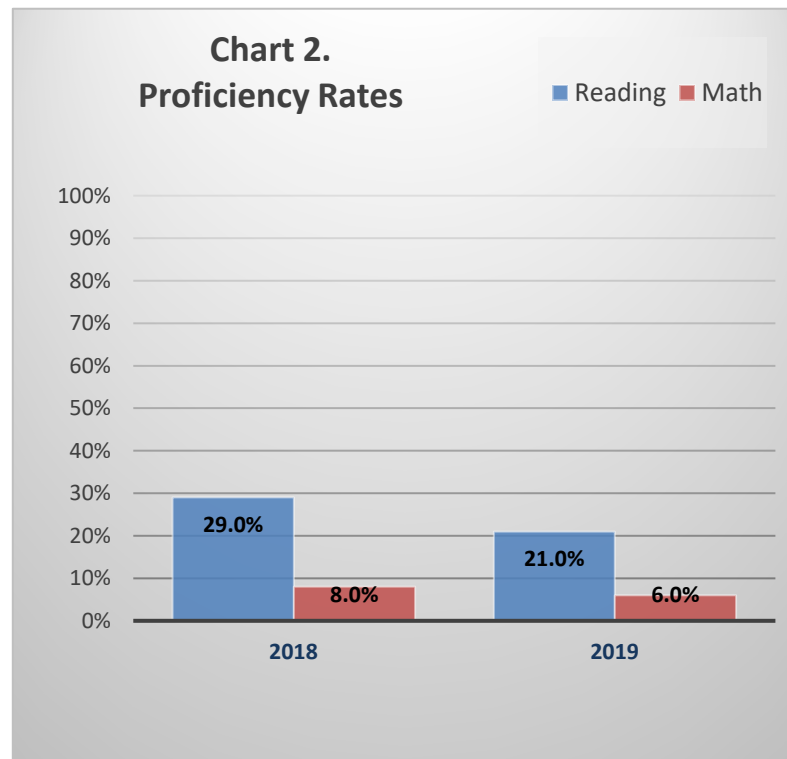
For 2020 and 2021, due to the COVID-19 health emergency school closures in Spring 2020 lasting through 2021, schools were waived from administration of state assessments and were unable to complete other assessments and projects required to meet mission goals. Therefore, state assessment data is not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

1a. Department's Standards of Excellence

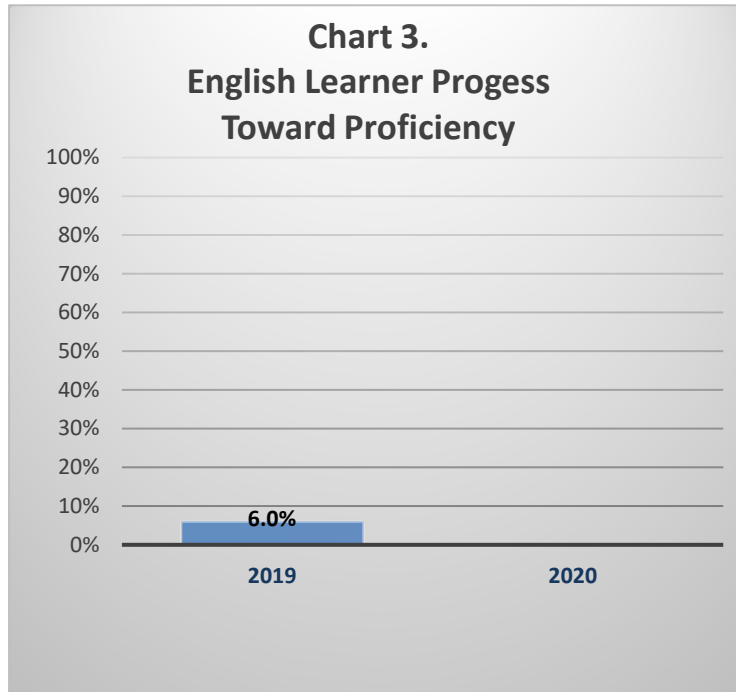
Overall Standing: Charts 1 and 1a illustrate the school's overall score (out of 100 possible points) in each of the years in which state assessment data is available (FY2018-FY2019).



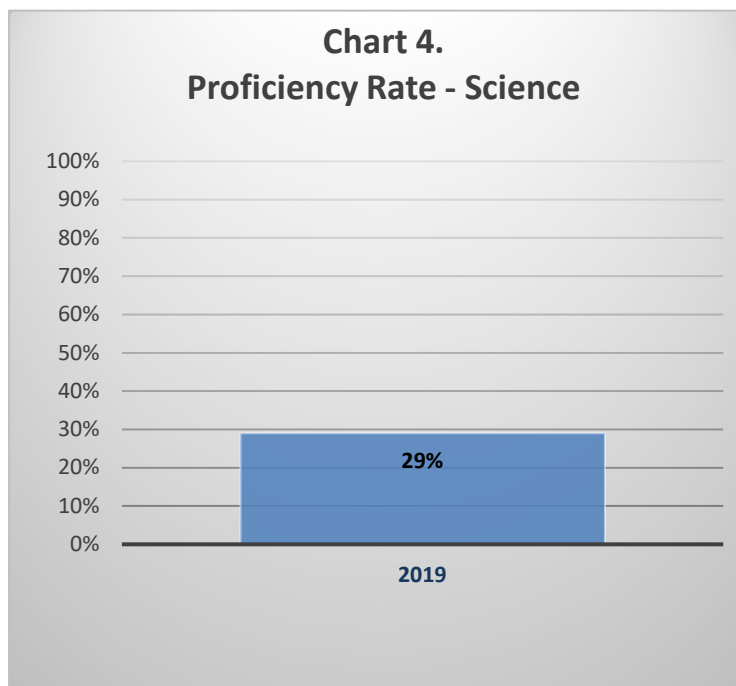
Proficiency Rates: Chart 2 shows the school's proficiency rates in **reading and math** in each of the years in which state assessment data is available (FY2018-FY2019).



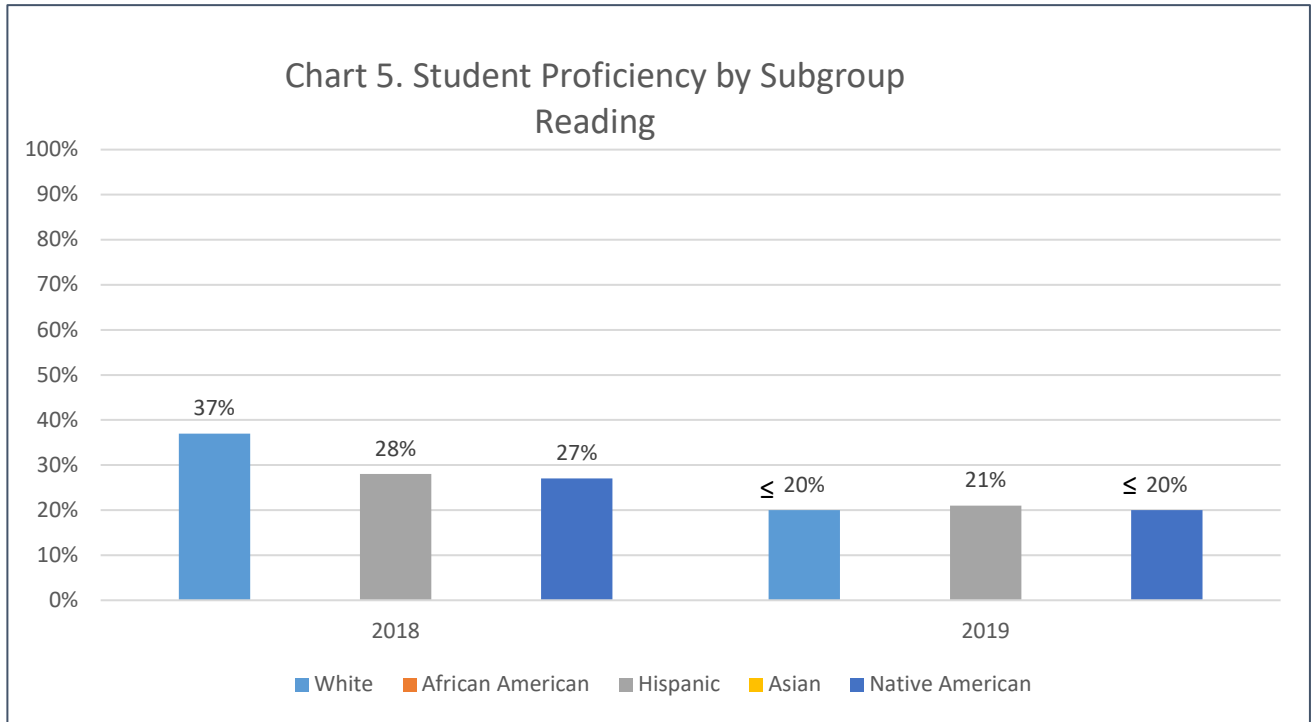
English Learner Progress Toward English Language Proficiency: This indicator was added in 2019 and is measured by the WIDA ACCESS assessment given annually to students identified as English Learners. It is the percentage of English Language Learners who are “on track” to achieve English Proficiency in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



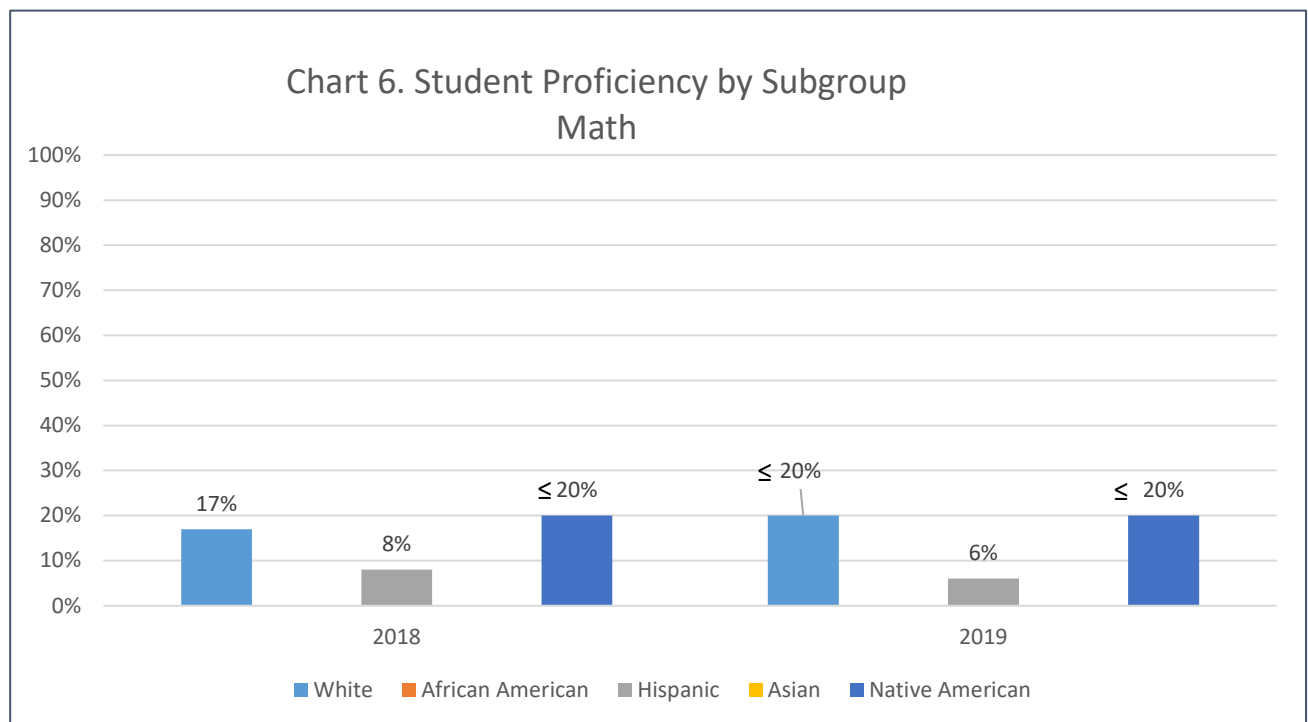
Science Proficiency: This indicator was added in 2019 and Chart 4 indicates the percentage of students who scored at the proficient level on state assessments in science.



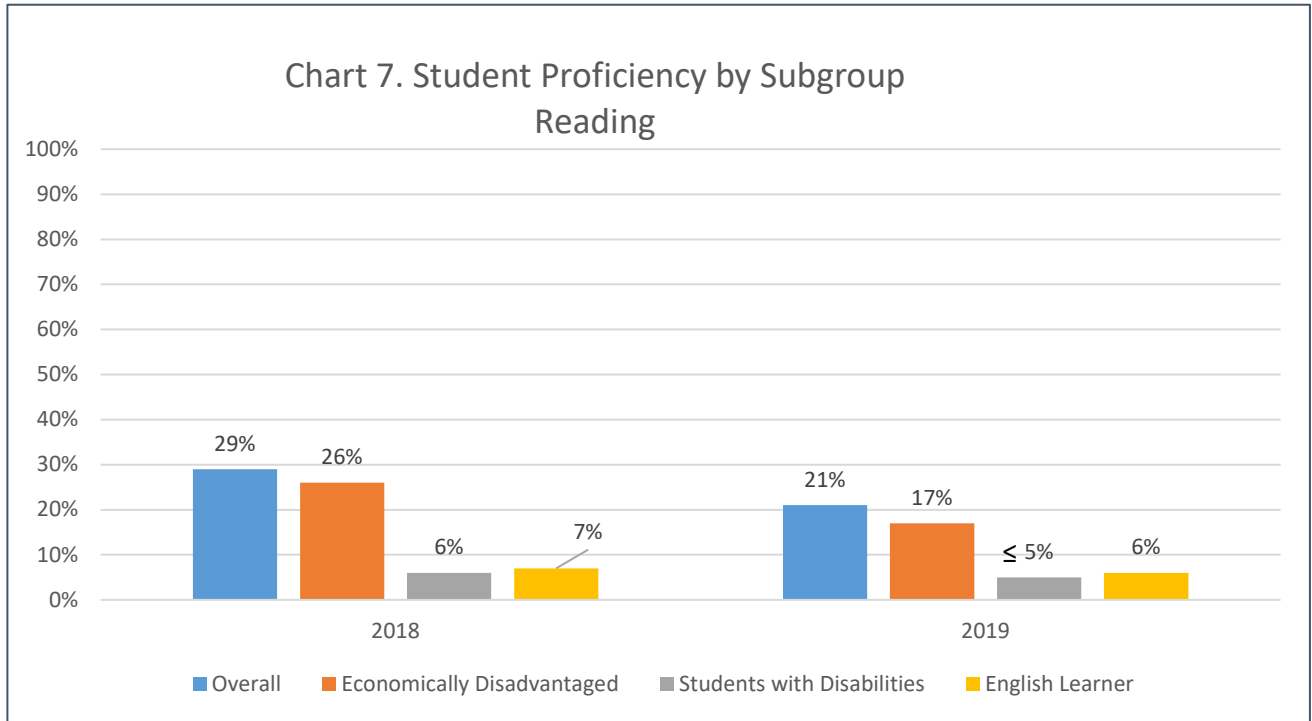
Race/Ethnicity Subgroups - Proficiency in Reading



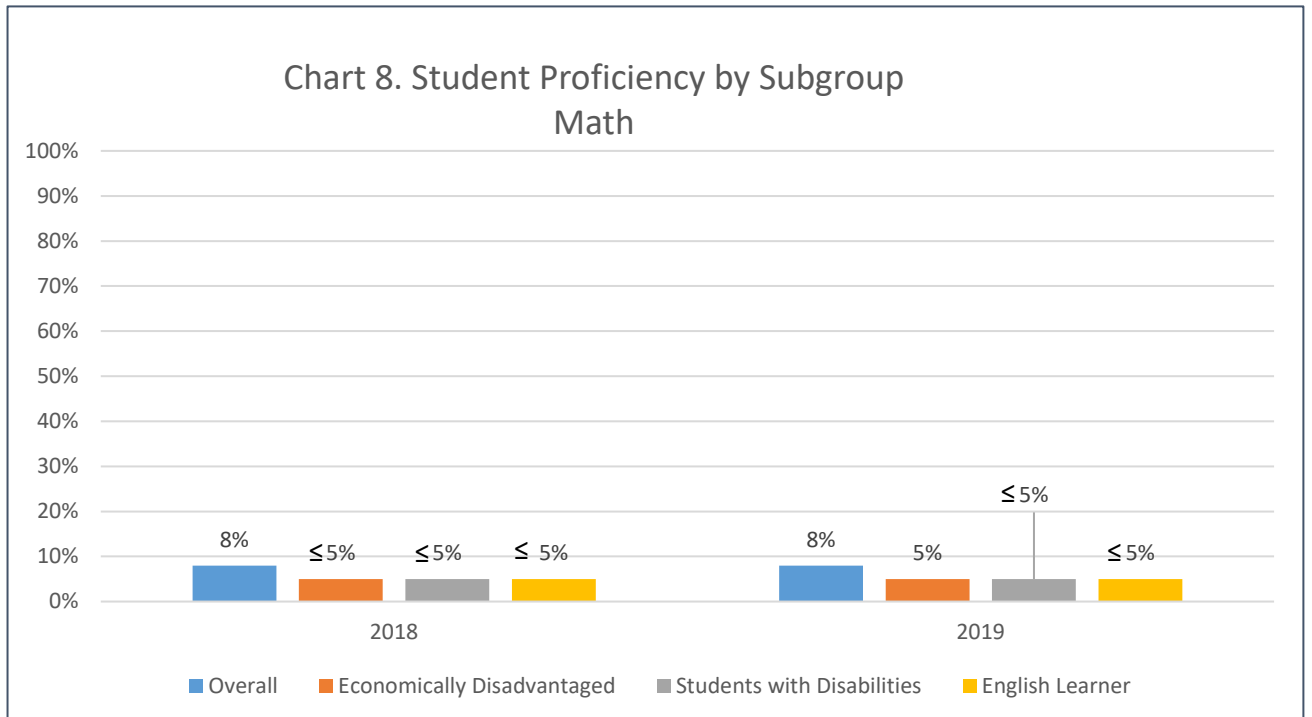
Race/Ethnicity Subgroups - Proficiency in Math



Other Subgroups - Proficiency in Reading

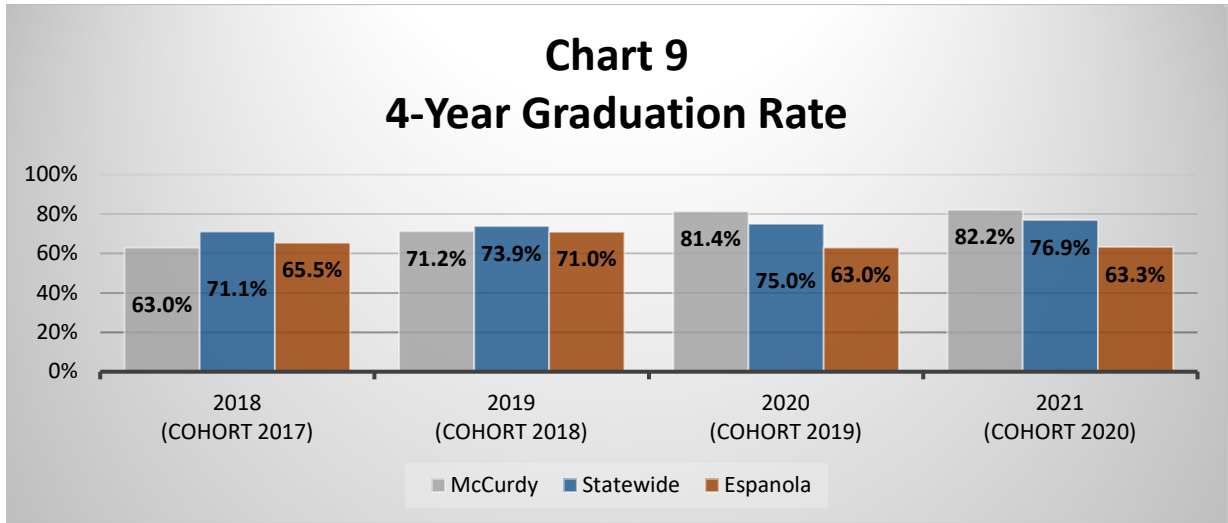


Other Subgroups - Proficiency in Math

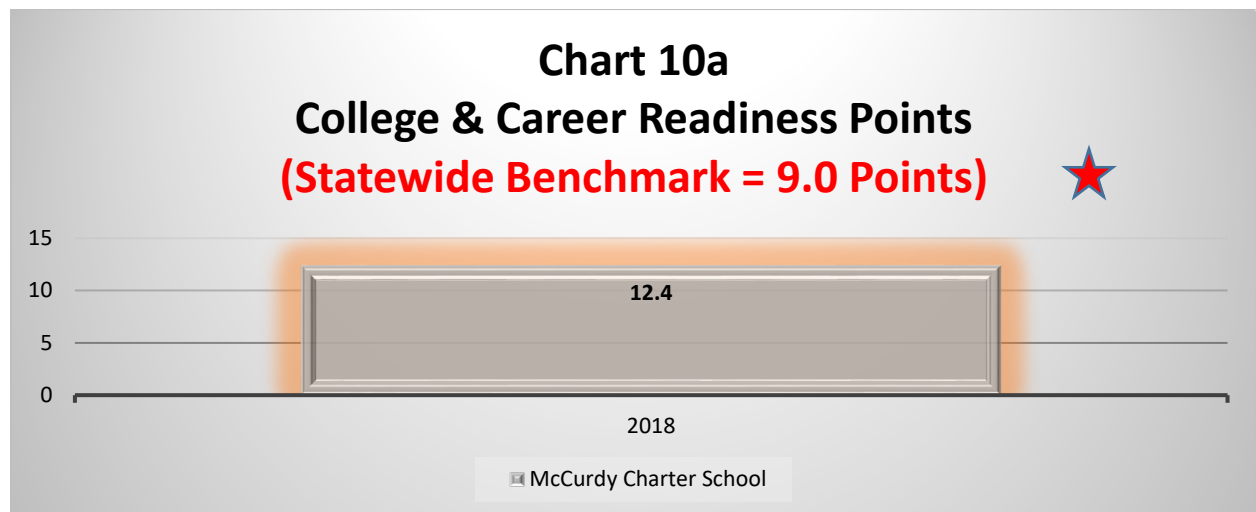


High School Graduation Rates for the 4-year cohort

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

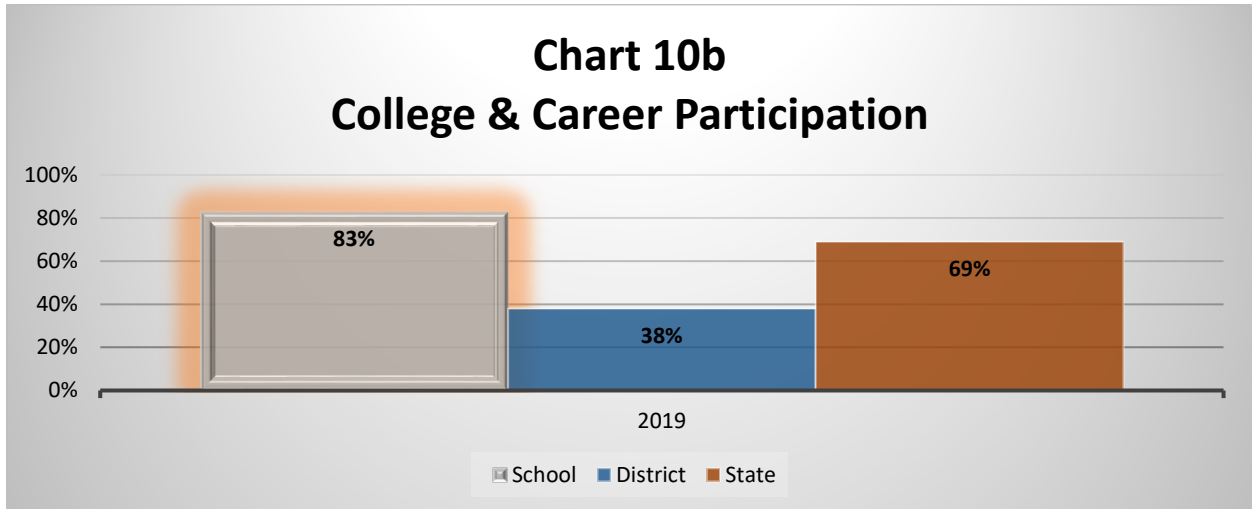


College & Career Readiness (CCR): This indicator evaluates the percent of cohort members (high school students' 4th year) who show evidence of college or career preparation, along with the proportion of those students meeting a success benchmark¹. Schools receive credit when students participate in college entrance exams and coursework leading to dual credit and vocational certification. The school receives additional credit when students meet success goals. College and Career Readiness is composed of *Participation* (5 points) and *Success* (10 points) yielding a total 15 points in the high school's overall grade. The statewide benchmark for points earned is 9. Chart 14a illustrates the total *College and Career Readiness* (CCR) points earned during FY18. In subsequent years, (FY19 onward) PED began presenting *Participation* and *Success* separately. The separated data is given in charts 14b and 14c.



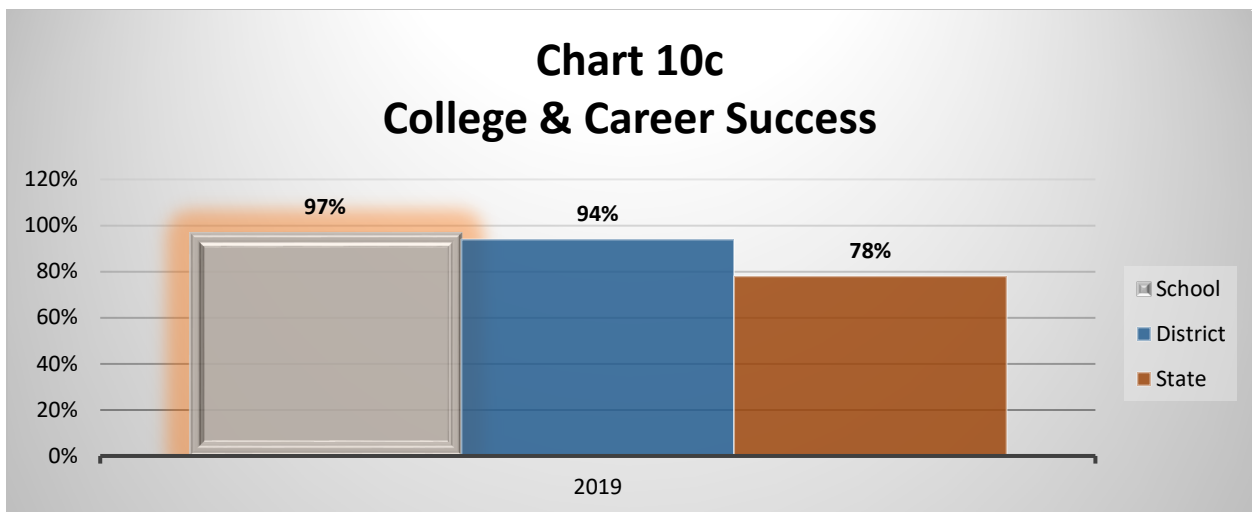
¹ "New Mexico Vistas Technical Guide" document for 2019 at:
<https://webnew.ped.state.nm.us/wp-content/uploads/2020/04/New-Mexico-Vistas-Technical-Guide-SY-2018-19.pdf>

College & Career Participation: High schools are awarded credit when students participate and succeed in college and career readiness (CCR) 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 the whether students participated in such activities.



College & Career Success: High schools are awarded credit when students participate and succeed in college and career readiness (CCR) 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).

The CCR indicator is calculated in a valid, reliable, and consistent manner for all high schools statewide, with the number of students participating in CCR activities divided by the number of students in the high school cohort.



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

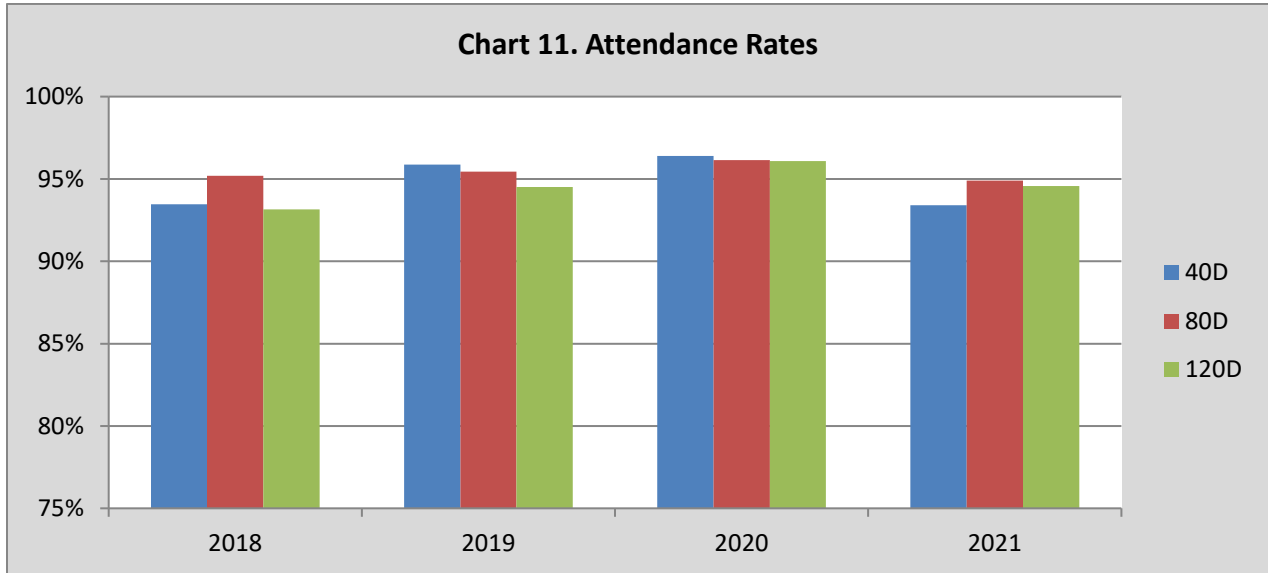
Mission goals were optional on the 2018 version of the contract. The school elected not to include mission-specific goals. Upon renewal, the school will be required to add mission goals (one minimum; two maximum).

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.

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.

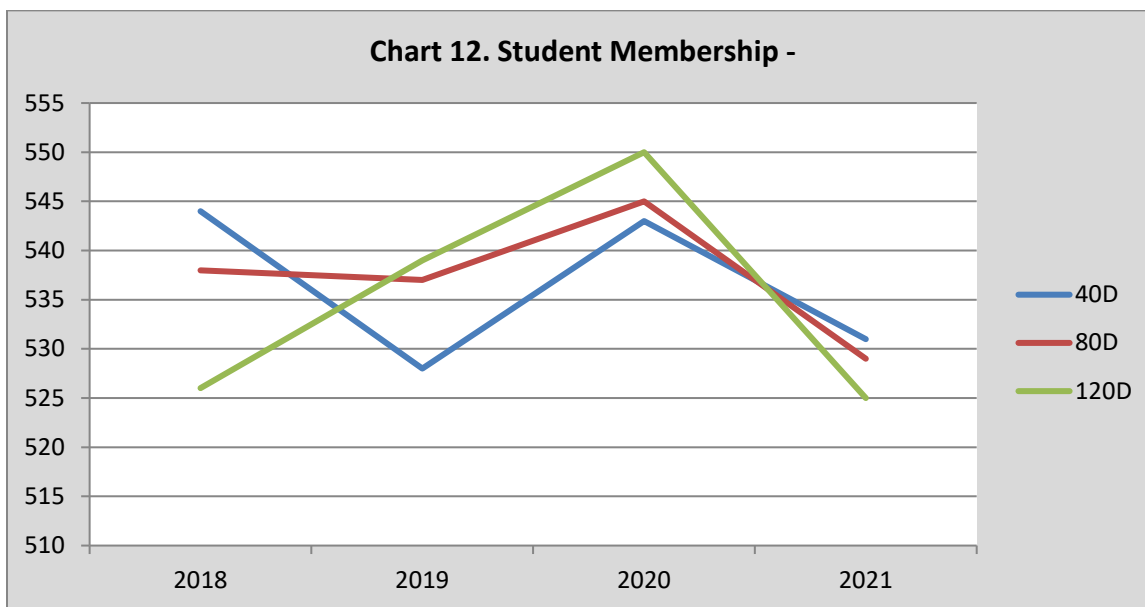
Attendance Rate (The statewide target is 95% or better.)



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

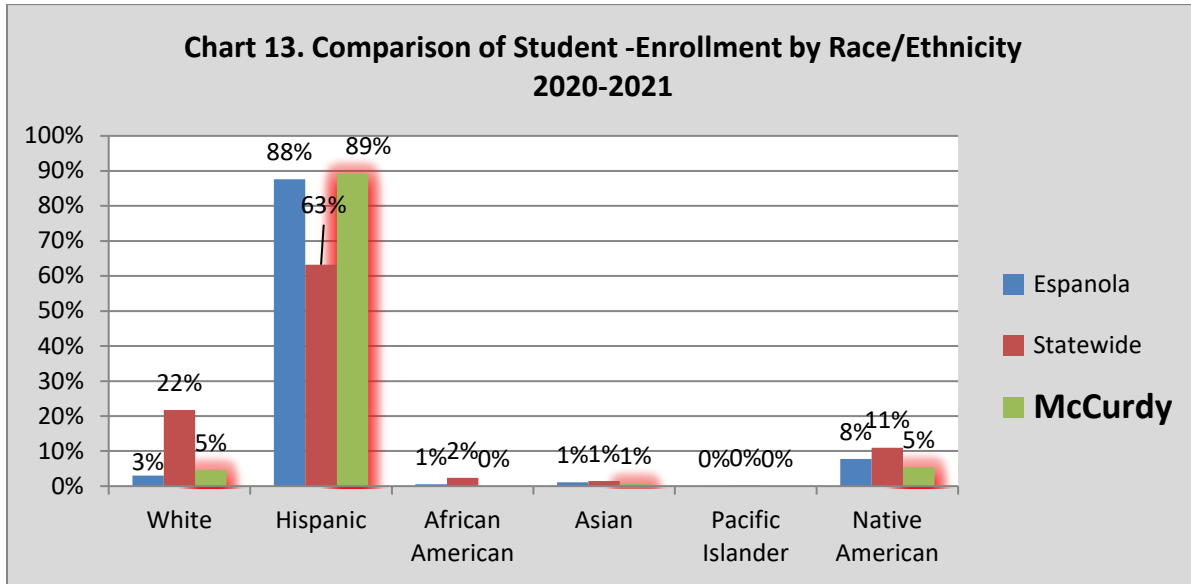
Student Membership (Enrollment)

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).



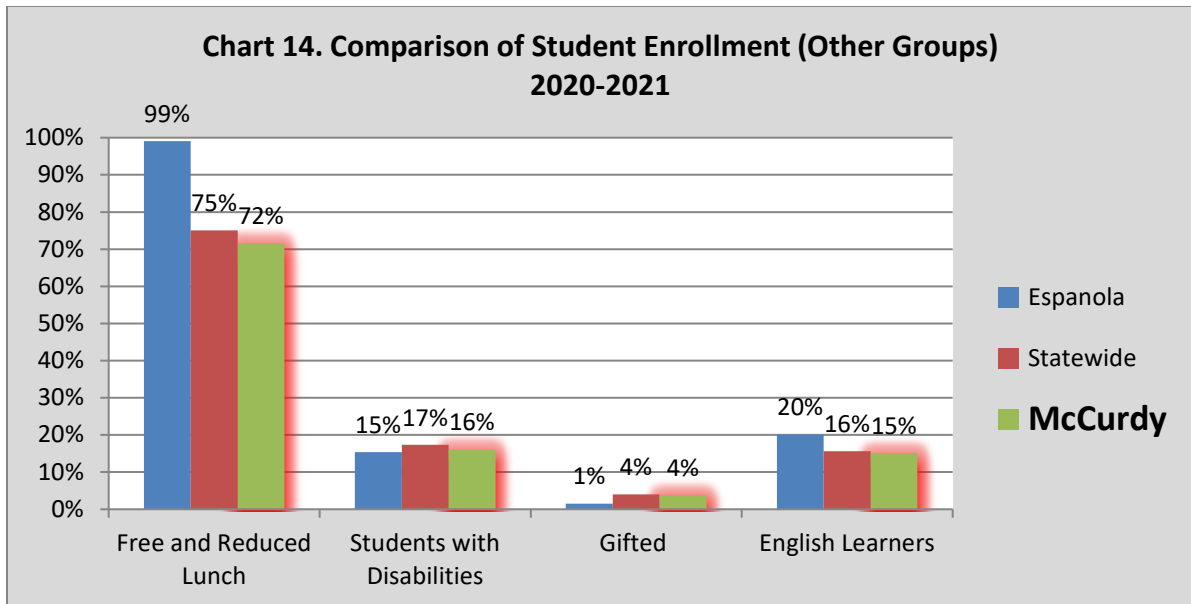
Source: STARS → District and Location Reports → General Reports → Enrollment by district by location by grade

Enrollment by Race/Ethnicity



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

Enrollment by Other Subgroups

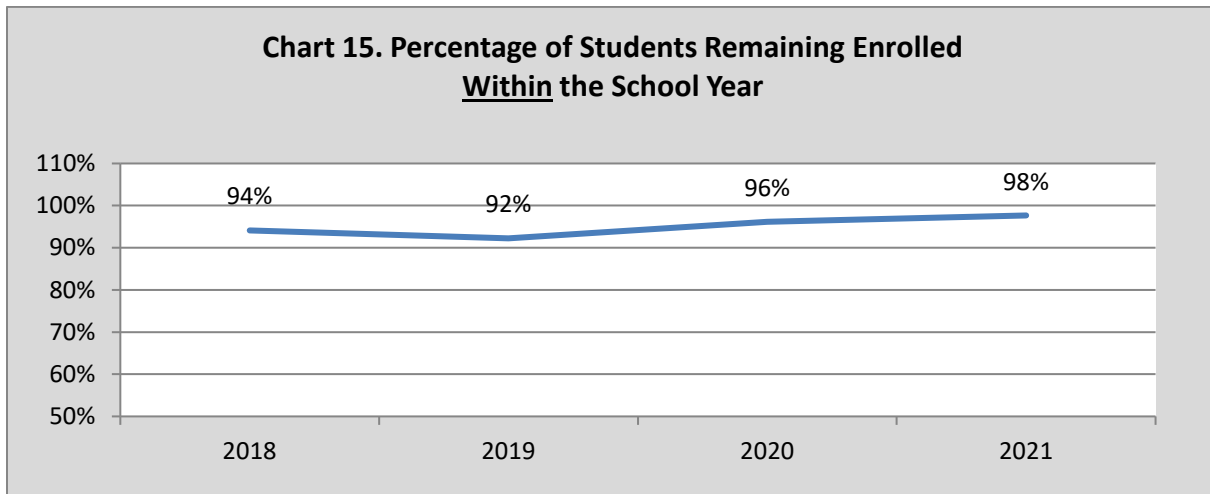


Source: STARS → District and Location Reports → General Reports → Enrollment Subgroup Percentages with Averages

Retention and Recurring Enrollment

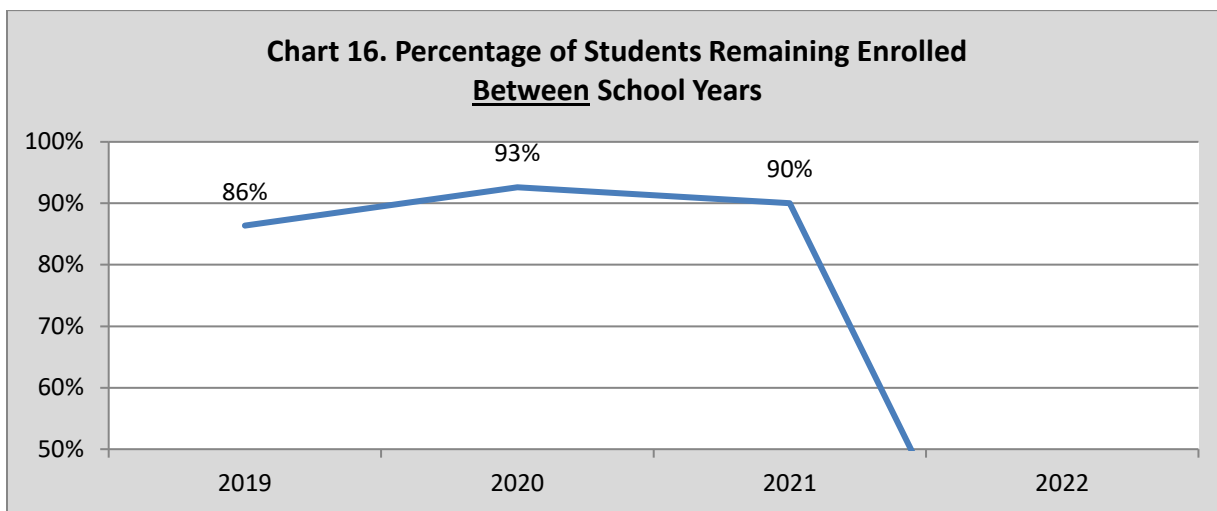
In its Performance Framework, the PEC established student retention expectations. For this school, the PEC established a target of 85% recurrent enrollment between years.

Below, in Chart 23, 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.

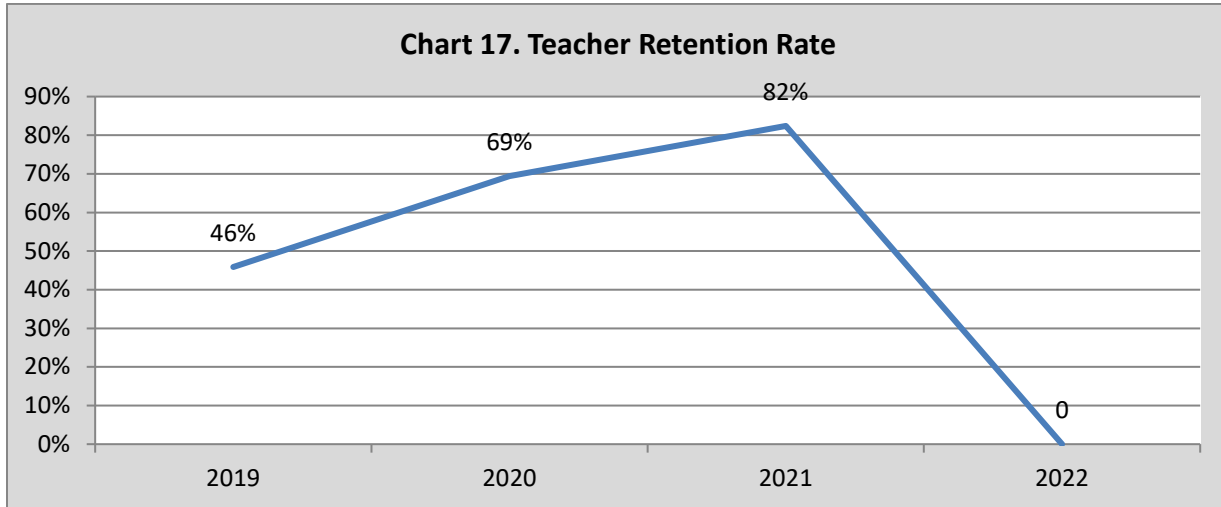


Source: STARS → District and Location Reports → Options for Parents → Charter School Enrollment Report

1d. Teacher Retention Rate

Chart 25 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	6	4	1
FY19	8	3	1
FY18	5	1	5
FY17	4	1	1

Summary of Most Recent Fiscal Report

In FY20, the school received the following audit finding:

2020-001 Budgetary Conditions (Previously 2019-001) (Other Noncompliance)

Condition/Context: During our audit, we noted one expenditure function where actual expenditures exceeded the budgetary authority:

- Fund 22000 Function: 1000 Instruction \$30,665

Management's Response: This was an oversight. Management will check all budgets at least semi-annually for compliance with budgeting.

2020-002 Internal Control Over Purchasing and Disbursements (Previously 2018-004) (Other Noncompliance)

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:

- 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.
- 3 instances in which the PO was exceeded by \$1,310.
- 3 Instances in which the PO was dated after the purchase, totaling \$12,899.

Management's Response: The Finance Director will work with the CPO and Business Office to understand account codes and procurement requirements.

2020-003 Cash Receipts Athletic Events (Other Matters)

Condition/Context: During our review of various cash receipts and the related ticket sales reconciliation forms, we observed the following:

- 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.
- 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.
- 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 \$84.

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.

2020-004 Internal Control Over Payroll (Other Matters)

Condition/Context: During our audit testing over personnel files, we identified 1 of 10 employees which the employee was underpaid \$231.25.

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.

2020-005 Internal Control Over Financial Reporting (Previously 2017-003) (Material Weakness)

Condition/Context: During our audit, we identified the following issues related to the financial close and reporting process:

- Approximately \$46,307 incorrectly classified as lunch fees instead of as federal grant revenue related to the USDA National School Lunch Program.
- The capital asset schedule incorrectly excluded a capital asset in the amount of \$5,590.
- 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 the carried over from the old system that need to be adjusted for.

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.

2020-006 Untimely Processing and Submission of Reimbursement Requests (Previously 2019-008) (Other matters)

Condition/Context: As of June 30, 2020, the school required temporary interfund loans to cover negative cash balances of approximately \$450,000. This is a request 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.

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 and RfR so that there is backup during heavy workloads.

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

The McCurdy Charter School educational philosophy integrates academic, character and community elements through the Core Knowledge curriculum in grades K-8 and the Paideia methodology of Socratic discussion in grades 7-12, both of which are aligned with New Mexico Common Core State Standards.

All graduating seniors will have successfully completed 4 math credits.

All students will participate in a designated character development, anti-bullying, and social-emotional learning curriculum on a monthly basis, at a minimum.

The school will implement a digital learning plan to ensure technology use and instruction is integrated into all grade level curriculum.

Students in every grade level will complete one classroom-based service learning project each semester.

All graduating seniors will have successfully completed a one credit hour service learning course.

The school will offer co-curricular activities, including athletics through the New Mexico Activities Association.

The school implements a family engagement program to encourage family participation in the school community.

3b. Organizational Performance Framework

McCurdy Charter School	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)	45.51 Points (Lower Middle)		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	Working to Meet Standard	Meets (or Exceeds) Standard	Meets (or Exceeds) Standard	Unable to Review - COVID
Indicator 4a Students & Employees: protecting the rights of all students	Falls Far Below (or Does Not Meet)	Meets (or Exceeds) Standard	Working to Meet Standard	ASSURANCES
Indicator 1c Educational Program: protecting the rights of students with disabilities	Working to Meet Standard	Falls Far Below (or Does Not Meet) Standa	Working to Meet Standard	Meets (or Exceeds) Standard
Indicator 1d Educational Program: protecting the rights of English Language Learners	Working to Meet Standard	Working to Meet Standard	Working to Meet Standard	Meets (or Exceeds) Standard
Indicator 4b Students & Employees: attendance, retention, and recurrent enrollment	Meets (or Exceeds) Standard	Meets (or Exceeds) Standard	Meets (or Exceeds) Standard	Meets (or Exceeds) Standard
<i>Included in Indicator 4b</i>	Meets (or Exceeds) Standard			
Indicator 2a Financial Mgmt & Oversight: meeting financial reporting and compliance requirements	Falls Far Below (or Does Not Meet)	Falls Far Below (or Does Not Meet) Standa	Working to Meet Standard	Working to Meet Standard
Indicator 2b Financial Mgmt & Oversight: following generally accepted accounting principles	Working to Meet Standard	Falls Far Below (or Does Not Meet) Standa	Does Not Meet Standard	Does Not Meet Standard
Indicator 3a Governance & Reporting: complying with governance requirements	Meets (or Exceeds) Standard	Falls Far Below (or Does Not Meet) Standa	Working to Meet 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	Falls Far Below (or Does Not Meet)	Meets (or Exceeds) Standard	Meets (or Exceeds) Standard	Working to Meet Standard
Indicator 4d Students & Employees: respecting employee rights	Working to Meet Standard	Falls Far Below (or Does Not Meet) Standa	Meets (or Exceeds) Standard	ASSURANCES
Indicator 4e Students & Employees: completing required background checks / reporting ethical violations	Falls Far Below (or Does Not Meet)	Falls Far Below (or Does Not Meet) Standa	Meets (or Exceeds) 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	Working to Meet Standard	Meets (or Exceeds) Standard	Working to Meet Standard	ASSURANCES
Indicator 5d School Environment: handling information appropriately	Falls Far Below (or Does Not Meet)	Meets (or Exceeds) Standard	Working to Meet 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		Working to Meet Standard	Not Applicable	Unable to Review - COVID
Indicator 2c Financial Mgmt & Oversight: responsive to audit findings		Falls Far Below (or Does Not Meet) Standa	Does Not Meet Standard	Does Not Meet 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	Meets (or Exceeds) 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		Falls Far Below (or Does Not Meet) Standa	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 six (6) members serving on their Governing Body. They are in their second year of being coached by Kelly Callahan. 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
Nancy O’Brien		11.5	8
Chris Martinez	Chair	11.5	8
Deborah Bennett-Anderson		11.5	8
Juan Valdez		11.5	8
Adan Trujillo		11.5	8
Crystal Espinoza		11.5	8

Figure 7. Current governing council members

*Training requirements reduced by any approved exemptions.