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**Charter Schools Division  
Preliminary Analysis of Renewal Application and Site Visit  
November 2021**

**School Name:** Estancia Valley Classical Academy (EVCA)

**School Address:** 110 State Highway 344, Edgewood, NM 87015

**Head Administrator:** Jennifer Rivera

**Governing Board Chair:** Douglas Ghormley

**Business Manager:** Holly Massey

**Authorized Grade Levels:** Kindergarten – Grade 12

**Authorized Enrollment:** 780

**Contract Term:** July 1, 2017 – June 30, 2022

**Mission:** To preserve our Nation's founding principles, Estancia Valley Classical Academy seeks to furnish willing students a rigorous education in the humanities, the sciences, and the arts with such instruction in the virtues as will best develop the mind and character of its pupils.

**Statutory Renewal Requirements**

According to New Mexico Statutes Annotated (NMSA) 1979, Section 22-8B-12 K., a charter may be suspended, revoked, or not renewed by the chartering authority if the chartering authority determines that the charter school did any of the following:

- (1) committed a material violation of any of the conditions, standards or procedures set forth in the charter contract;
- (2) failed to meet or make substantial progress toward achievement of the department's standards of excellence or student performance standards identified in the charter contract;
- (3) failed to meet generally accepted standards of fiscal management;
- (4) for a charter school located on tribal land, failed to comply with ongoing consultations pursuant to the Indian Education Act; or

(5) violated any provision of law from which the charter school was not specifically exempted.

### Renewal Application

Parts A and F of the Renewal Application are provided by the Charter Schools Division (CSD). All other parts of the application are provided by the school.

<b>PART A</b>	<b>Data analysis based on accountability and reporting data from current charter contract term</b>
<b>PART B</b>	<b>Progress report on meeting the</b> academic performance, financial compliance and governance responsibilities of the charter school, including achieving the goals, objectives, student performance outcomes, and accountability requirements set forth in the Assessment and Accountability Act and the charter contract.
<b>PART C</b>	<b>Financial Statement</b> A financial statement that discloses the costs of administration, instruction and other spending categories for the charter school that is understandable to the general public that allows comparison of costs to other schools.
<b>PART D</b>	<b>Petitions in support of the charter renewing its charter status</b> <ul style="list-style-type: none"> <li>• Petition signed by at least 65% of the school’s <b>employees</b>, with certified affidavit: <b>58 of 60 = 96%</b></li> <li>• Petition signed by at least 75% of the <b>households</b> whose children are enrolled, with certified affidavit: <b>293 of 350 = 83%</b></li> </ul>
<b>PART E</b>	<b>Description of the Charter School Facilities and Assurances that the facilities are in compliance with the requirements of Section 22-8B-4.2 NMSA 1978</b> <ul style="list-style-type: none"> <li>• The facility lease agreement as Appendix D</li> <li>• Narrative description of its facilities, attaching the Facility Master Plan, if available, as Appendix H</li> <li>• The building E Occupancy certificate(s) dated <b>10/26/18</b>. Maximum Occupancy (if listed): Not listed</li> <li>• Most recent facility NMCI Score <b>78%</b> indicating that the school meets the requirements of Subsection C of 22-8B-4.2 NMSA 1978</li> <li>• If the school is relocating or expanding, assurances that the facilities comply with the requirements of Section 22-8B-4.2 NMSA 1978: _____ Public (Cert A) _____ Private (Cert B) _____ Foundation (Cert C)</li> </ul>
<b>PART F</b>	<b>Amendment Requests</b>

The CSD team reviewed the school’s Progress Report (Part B) and conducted a renewal site visit on October 6-7, 2021. Ratings are based on the rubric provided on page 14 of the [State Charter Renewal Application](#).

Progress Report (Part B) and Site Visit Evaluation		
Section	Indicator	Rating
<b>ACADEMIC PERFORMANCE</b>		
1.a	<b>Department’s Standards of Excellence</b> NM System of School Support and Accountability 2018-2019: 63, <i>Spotlight Designation</i> , 3 <i>DOEs</i> 2019-2020: <i>No data available for schools</i> 2020-2021: <i>No data available for schools</i> Overall NM School Grade 2017-2018: A	<i>Meets the Standard</i>
1.b	<b>Mission-Specific Goals</b> <i>The school did not include a mission-specific goal in its charter contract.</i>	<i>Not Applicable</i>
<b>FINANCIAL COMPLIANCE</b>		
2.a	<b>Audit</b> <i>Organizational Performance Framework 2a-2e</i>	<i>Demonstrates Substantial Progress</i>
2.b	<b>Board of Finance</b> <i>The school has maintained a board of finance throughout the charter term.</i>	<i>Meets the Standard</i>
<b>CONTRACTUAL, ORGANIZATIONAL, AND GOVERNANCE</b>		

3.a	<b>Comprehensive Educational Program</b> <i>See the narrative below for detail.</i>	<i>Meets the Standard</i>
3.b	<b>Organizational Performance Framework</b> <i>Organizational Performance Framework 1b-1f, 4a-4e, and 5a-5d</i>	<i>Meets the Standard</i>
3.c	<b>Governance Responsibilities</b> <i>Organizational Performance Framework 3a-3c</i>	<i>Meets the Standard</i>

**Academic Performance**

**NMPED Accountability Data 2018-2019**

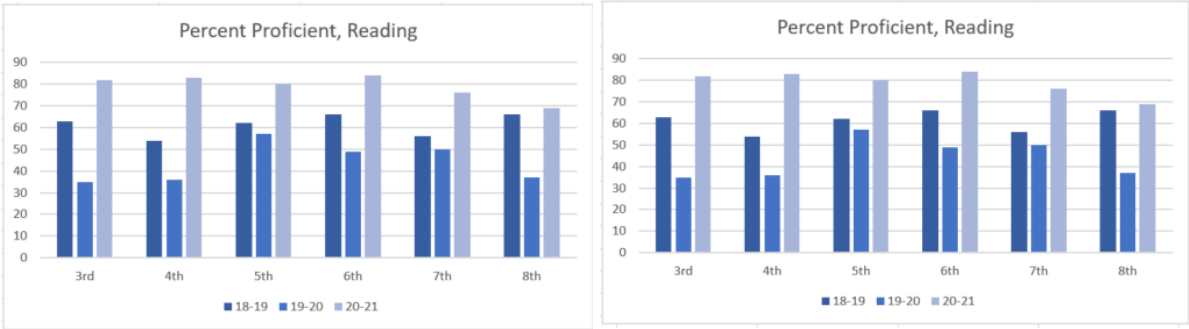
	<b>Overall</b>	<b>Reading Proficiency</b>	<b>Math Proficiency</b>	<b>Science Proficiency</b>	<b>English Learner Progress</b>
<b>Estancia Valley Classical Academy</b>	63	52	39	68	Masked
Moriarty-Edgewood	48	35	18	45	28
Statewide	-	34	21	40	29

\* Green shading indicates Spotlight School (overall) or Spotlight Designations of Excellence (other areas).

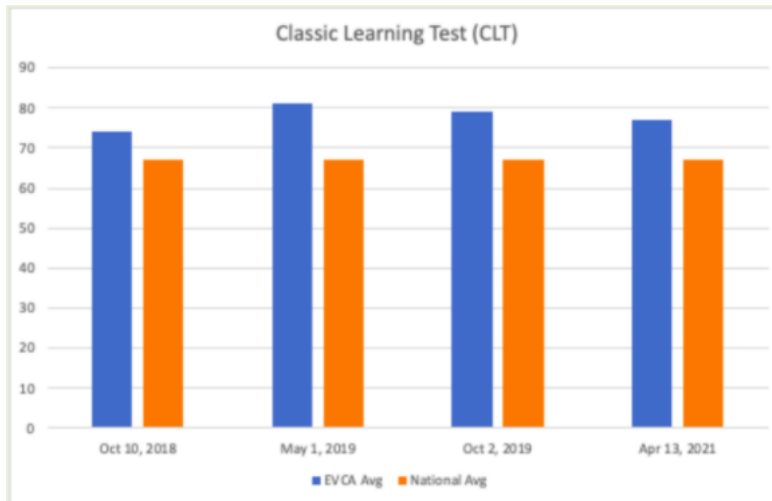
Estancia Valley Classical Academy (EVCA) had an overall score of 63, earning a Spotlight Designation and placing the school well above the local school district. EVCA also earned three Designations of Excellence, in career and college readiness, five-year graduation, and graduation growth.

To measure student achievement, EVCA uses a wide range of assessments to monitor student progress, including I-station, Gates-MacGinitie Reading test, McCall Crabbs, Lexia, I-Singapore, the Classical Learning Test (CLT), SAT, ASVAB, NMESSA, NMASR, and regular classroom assessments in all grades.

Because Estancia Valley Classical Academy qualified for expedited renewal, the school was not required to submit a Part B response to academic performance. However, the school provided the following graphs which report reading and math proficiencies for grades 3 – 8 based on short cycle assessments.



In 2018, EVCA began offering the Classic Learning Test (CLT), a standardized college readiness test. The results are as follows:



## Public Education Commission Performance Framework

Estancia Valley Classical Academy	2017-2018	2018-2019	2019-2020	2020-2021
<b>Category I. Academic Performance Framework</b>				
Indicator 1 Components of School Accountability System	Meets (or Exceeds) Standard	62.85 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
<b>Financial Performance Framework</b>				
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
<b>Category II. Organizational Performance Framework</b>				
Indicator 1a Educational Program: mission and educational program of approved charter application	Meets (or Exceeds) 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	Unable to Review - COVID	Unable to Review - COVID
Indicator 4a Students & Employees: protecting the rights of all students	Working to Meet Standard	Meets (or Exceeds) Standard	Unable to Review - COVID	ASSURANCES
Indicator 1c Educational Program: protecting the rights of students with disabilities	Meets (or Exceeds) Standard	Meets (or Exceeds) Standard	Unable to Review - COVID	Meets (or Exceeds) Standard
Indicator 1d Educational Program: protecting the rights of English Language Learners	Meets (or Exceeds) Standard	Working to Meet Standard	Unable to Review - COVID	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
Included in Indicator 4b	Meets (or Exceeds) Standard			
Indicator 2a Financial Mgmt & Oversight: meeting financial reporting and compliance requirements	Falls Far Below (or Does Not Meet) Standard	Working to Meet Standard	Working to Meet Standard	Working to Meet Standard
Indicator 2b Financial Mgmt & Oversight: following generally accepted accounting principles	Falls Far Below (or Does Not Meet) Standard	Falls Far Below (or Does Not Meet) Standard	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
Included in Indicator 3c	Meets (or Exceeds) Standard			
Indicator 4c Students & Employees: meeting teacher and other staff credentialing requirements	Working to Meet Standard	Meets (or Exceeds) Standard	Unable to Review - COVID	Meets (or Exceeds) Standard
Indicator 4d Students & Employees: respecting employee rights	Meets (or Exceeds) Standard	Working to Meet Standard	Unable to Review - COVID	ASSURANCES
Indicator 4e Students & Employees: completing required background checks / reporting ethical violations	Meets (or Exceeds) Standard	Meets (or Exceeds) Standard	Unable to Review - COVID	ASSURANCES
Indicator 5a School Environment: complying with facilities requirements	Working to Meet Standard	Meets (or Exceeds) Standard	Unable to Review - COVID	ASSURANCES
Indicator 5c School Environment: complying with health and safety requirements	Meets (or Exceeds) Standard	Working to Meet Standard	Unable to Review - COVID	ASSURANCES
Indicator 5d School Environment: handling information appropriately	Meets (or Exceeds) Standard	Meets (or Exceeds) Standard	Meets (or Exceeds) Standard	ASSURANCES
<b>OTHER</b>				
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	Not Applicable
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				
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	Unable to Review - COVID	ASSURANCES

## Organizational Performance

EVCA has made improvement and has maintained a “Meets (or Exceeds) Standard” rating for indicator 4c (meeting teacher and other staff credentialing requirements) during the previous 2 ratings years. EVCA also made improvement from 2018-19 to 2020-21 for indicator 1d (protecting the rights of English Language Learners).

In 2020-21 the school still appears to need improvement with the financial performance indicators. Indicators 2a and 2b refer to the schools 2020 audit report findings. The school received a *Working to Meet* rating for indicator 2.a. (meeting financial reporting and compliance requirements) because the

school had two (2) audit findings and provided a management response to the auditor. Indicator 2.b. (following generally accepted accounting principles) refers to the severity of the audit finding. The school received a *Does Not Meet* rating because one of the two audit findings in 2020 was a material weakness. The school currently employs a full-time, on-site business manager. The school leadership acknowledges the heavy financial requirements and administrative supports a school of this size requires. Therefore, the school's FY22 budget includes an additional .5 FTE for business office support.

### **Financial Performance**

EVCA is on a quarterly reporting status, which indicates the school's business manager is responsive to School Budget Bureau requests and reports are submitted in a timely manner. The school's business manager has been serving in this capacity throughout this contract term and at no time during the contract term did the school move from quarterly reporting status.

Student membership at EVCA has grown an average of 8% each year of the current contract. The school moved into a new building late in the 2018 calendar year to accommodate the growth. As expected, rent expense increased during this time. The school has been successful in using Public School Capital Outlay funds (Fund 31200) to offset rent expense throughout the contract term, but the fund has not increased at the same rate as rent has. In 2017-18 PSCO provided \$331,681, which was 62% of total rent, compared to 2020-21 when \$440,527 in PSCO funds covered only 36% of the year's rent.

The school received eleven (11) audit findings from 2017 to 2020. Since the school's foundation is a component unit of the school, any findings received by the foundation is reflected in the school's finding count which was the case in 2018 when the foundation received one (1) significant deficiency finding. In the most recent published audit report, EVCA received a material weakness finding for lack of policies, procedures or internal controls. The school business manager stated this occurred due to insufficient guidance on proper reporting of capital asset additions.

<b>Audit Year</b>	<b># of Findings</b>	<b># of Repeat Findings</b>	<b># of Material Weaknesses</b>	<b>Significant Deficiencies</b>
FY 2020	2	0	1	0
FY 2019	2	1	0	0
FY 2018	5	0	0	1
FY 2017	2	1	0	2

During the contract term the school has been able to prioritize spending in the classroom at an average of 69% with administration expense as a percentage showing a slight decrease, while rent expense experienced an increase for the reasons mentioned previously. Student enrollment size contributes to the school's ability to maintain these spending percentages.

General Fund (11000) data as reported in OBMS - Fourth Quarter

			Contract Years				
			Actual	Actual	Actual	Actual	Budgeted
			General Fund - 11000- Amounts (in whole dollars)				
Enrollment			FY17-18	FY18-19	FY19-20	FY20-21	FY21-22
	120D Student membership		488	548	587	590	590
	40D program units from final funded run		677,602	841,319	908,771	973,973	975,264
Function	Function Name	Description of Expenditures					
1000	Direct Instruction	Classroom teachers, educational assistants, instructional coaches, textbooks, classroom technology	1,765,959	2,332,473	2,626,259	2,566,382	2,801,123
2100	Student Support	Attendance, social worker, guidance, health, psychological, speech & occupational therapy services	123,611	167,169	184,878	190,805	148,348
2200	Instructional Support	Library, instruction related technology	-	-	-	-	-
2300	Central Administration	Governance council, Office of Superintendent, community relations	145,239	124,513	111,919	129,000	163,576
2400	School Administration	Office of the Principal	103,345	136,661	187,835	183,118	300,198
2500	Central Services	Business management, administrative support, admin technology	62,040	64,612	49,860	71,821	71,809
2600	Maintenance & Operations	Building operations, maintenance, equipment upkeep, security & safety	443,156	620,542	975,638	1,073,117	1,245,924
2700-5900	All Other Function Codes	Transportation, food service & capital outlay	-	-	-	-	-
<b>Total</b>			<b>2,643,349</b>	<b>3,445,970</b>	<b>4,136,388</b>	<b>4,214,243</b>	<b>4,730,978</b>
<b>Total State Equalization Guarantee (SEG) Funding</b>			<b>2,733,643</b>	<b>3,455,325</b>	<b>4,017,207</b>	<b>4,239,334</b>	<b>4,668,361</b>
<b>Carryover(Shortfall)</b>			<b>90,294</b>	<b>9,355</b>	<b>(119,181)</b>	<b>25,091</b>	
How Funds Were Spent in Percentages of Total							
	Classroom		71%	73%	68%	65%	62%
	Administration		12%	9%	8%	9%	11%
	Other		17%	18%	24%	25%	26%

The PED Operating Budget Management System (OBMS) showed 95%, approximately \$265,000, of the schools grant fund requests for reimbursements (RfRs) were submitted during June and July 2021

### Governance

The EVCA governing board has been consistent and stable throughout the contract term, with only one change in a board member. Communication with the board has been positive and responsive.

Governing Board Training Hours				
Board Members	FY18	FY19	FY20*	FY21
Douglas Ghormley - President	10	8	6	12
Deron Knoner – Vice President	10	8	6	8
Kim Adams - Treasurer	9	8	6	8
Bill Richard - Secretary			10	8
Roger Lenard	9	8	6	12
Theresa Nunneley	9	8	6	10
Harlan Lawson	8	8	8	

Black shading indicates that the member did not serve a full year in that fiscal year; yellow indicates that the member did not complete all required training hours during that fiscal year. Training requirements are 8 hours per year for returning board members, and 10 hours for new members. Exemptions are noted in years marked by an asterisk.

\* 2 hour exemption in FY20

## Comprehensive Educational Program

EVCA is a K-12 state charter located in Edgewood, New Mexico. The school currently utilizes a Hillsdale College endorsed curriculum through the Barney Charter School Initiative (BCSI), an outreach program of Hillsdale College. The curriculum is devoted to “the revitalization of public education through the launch and support of classical K-12 charter schools.” The curriculum “promotes a model of education that is rooted in the liberal arts and sciences, offers a firm grounding in civic virtue, and cultivates moral character.” According to the affiliate page on the Hillsdale website, the college appears to endorse schools that identify as either public classical charters or private Christian schools in nature. Upon review of the curriculum, it appears to be robust in its depiction of American History but is lacking in diversity of voice and representation.

As per the school’s contract with Hillsdale, EVCA is required to teach Latin and as a result, students in grades 3-6 are required to learn Greek and Latin roots and two years of Latin is required for students in the upper school. While EVCA’s Latin requirement will satisfy a student’s language requirement for the State of New Mexico, it is also important to note that if a student wants to take an additional language, that that language will be counted as an elective. Furthermore, the Latin requirement also poses a potential issue for students who transfer into EVCA, especially those coming in with credit recovery. When asked, the school does not conduct exit interviews for students who exit the school.

Interwoven into the school’s curriculum and mission is instruction in virtue through the 8 Pillars of Character: citizenship, cooperation, courage, honesty, integrity, perseverance, respect, and responsibility. The pillars are used as both a touchstone and framework for shaping ideas during class discussion (i.e. “which pillar of character is this character currently showing, how do you know it to be true?”) and a vital aspect of the school’s SEL program. During student focus groups, students at EVCA often referenced back to the pillars of character as a form of accountability for themselves. Teachers hand out “Pillars of Character” cards to students who demonstrate one of the pillars.

The Governing Board and school staff work hard to maintain integrity to the classical program. Teachers participate in professional development offerings focused on rigor, equity, and Socratic methodology; most of the school’s professional development is offered through Hillsdale, as well as conducted internally.

Student and parent focus groups expressed an understanding of high expectations. Most courses at the upper level are the equivalent of honors classes. Seniors prepare a moral philosophy thesis which aims to expose students with the works and teaching of historical philosophers with the intention to learn to reason and make and refute arguments to support a final project. Of the 54 students at EVCA in their junior senior year, 30 are enrolled in a dual credit program. Classes are offered through Mesalands and CNM and the school is working to add courses through ENMU. These classes count towards both high school elective credit and college credit. Students talked about rising to meet academic demands and said they like learning at high levels, and believe the teachers are there to support them in their learning. However, during the student focus group, many students discussed taking “mental health days,” to help offset the stresses associated with school. Several upper-level students said they appreciated having fewer distractions than in most public schools, i.e., the dress code, ban on technology in classrooms, and no sports program. Students identified the mission of the school as having a focus on the arts, humanities, and science. Students talked about learning to apply lessons from math and science to “real life.” One recurring theme was the focus on not only learning information, but why that information is important to know.

Students practice study skills during many classes. Notetaking skills are emphasized (in some classes more than others). Several students in one class were observed in the library, facilitating their own learning/study group. Students in focus groups reported that teachers are supportive, help students organize, and treat all students equally. Technology is seldom used as a teaching/learning tool in the classroom, apart from a special education classroom, where students were using computers to work on

individual goals and assignments. This is intentional, so students will not be focusing on computers or phones. during classroom observations, However, CSD did not consistently observe learning goals, assignments, and lesson objectives for student and teacher to see or reference throughout the class period.

Most teachers in focus groups reported implementing the curriculum with rigor. The renewal team saw few examples of Socratic instruction in the classroom, but students knew the principles and practices of Socratic instruction. Most teachers used a lecture style model with very little back-and-forth dialogue between either teacher and student or student-to-student. While nearly every teacher observed posted an agenda for the day, learning targets were rarely seen in the classrooms. When asked how they knew they were learning what they were supposed to, students said that they know how to present their ideas and justify them, that they do research and come up with their own understanding, and that what they are learning is about citizenship and being someone who contributes.

There is a student council, and students involved in student government have gone before the Governing Board to make public comments about their concerns. There is no sports program, but students can participate in the district schools' team sports. Students have opportunities to participate in afterschool programs such as intramurals, bible club, robotic club, swing dance, and violin.

Many students made comments comparing EVCA to "public schools," and appear to believe that the quality of their classical experience at EVCA rises far above the experience of students attending other public schools. Parents echoed this belief, one parent mentioned they felt they were getting a private education for free. A few students in focus groups had attended a district school in the past, but the vast majority of students were formerly home schooled.

The school recognizes the social and emotional needs of students, allowing them to take their own "mental health day" if needed. Students talked about feeling safe, accepting others, and being free to express an opinion or values different from their classmates without fear of retaliation or bullying. The site visit team observed courteous and positive behavior among students throughout the two day visit. During COVID, some students experienced COVID-related social and emotional issues, including struggling with isolation. The school initiated targeted support and many of these issues were resolved. One student said she believed that her brother, who was then a student at EVCA, was alive today because of this effort.

When asked about diverse cultures being welcomed, students said all students feel culturally welcome. In at least one student focus group, student responses focused on global cultures more than on local diversity. EVCA's part B addressed school demographics comparing the zip codes their students reside in as opposed to the Moriarty-Edgewood district overall. The schools data showed White and Hispanic residents were close to equal. The charter schools division relies on STARS data to compile this data because it codifies enrolled student population. EVCA compared to the two other public schools in Edgewood showed white students for those schools at 58% compared to EVCA at 67% and Hispanic student populations at 46% v. EVCA at 31%.

The school does not provide food services nor transportation. According to the parents who participated in the parent focus group, most of whom were also employed at the school, stated that they often coordinate carpools for students in the area through the school's Facebook page.

Parents feel strongly connected to the school and mentioned experiences their children had in a traditional school prior to enrolling in EVCA that include bullying, lack of teacher involvement/attention to individual learning needs (including special education). Parents had no concerns about the safety of students at EVCA. Parents are in general highly involved in the school. While volunteering isn't a formal requirement, parents appear to understand there is an expectation to become part of the learning community.



One comment made suggested that the unofficial expectation for parents to participate at the school, drive children to school and provide their own food was a way to “weed out” certain others from attending.

Discipline is handled in class by the teacher or, when necessary, by the Dean. During classes, teachers sometimes use strategies like positive peer pressure such as not allowing anyone in the class to earn extra points on an examination. School staff attribute the low number of disciplinary issues and the calm school climate to having clear expectations for student behavior. When infractions occur, there is a discussion between students and, typically, the Dean of Students, who will help them see why their misbehavior was wrong and a consequence could be given (usually detention). Parents appreciate the way in which the Dean handles discipline, including notifying parents immediately when their children misbehave.