



July 16, 2022

Corina Chavez,
Director
Options for Parents & Families, Charter Schools Division
New Mexico Public Education Department
300 Don Gaspar Ave.
Santa Fe, NM 87501

Dear Corina,

I am grateful to have the opportunity to submit this revised proposal in response to your questions on the original proposal. My goal with this proposal is to provide you with a bit more clarity and also include more flexibility for us to work together and course-correct throughout the process.

I hope that this is closer aligned with what you are envisioning and meets your and PEC's objectives.

Sincerely,

Naomi Rubin DeVeaux
Partner
National Charter Schools Institute

New Mexico Public Education Commission Charter School Accountability Framework Proposal

Overview

The National Charter Schools Institute proposes to provide facilitation and thought-partner support to develop a comprehensive charter school accountability framework for New Mexico Public Education Commission and Public Education Department. We will provide a national perspective, conduct research, provide data analysis, and facilitate an inclusive process.

We Know Authorizing

We have deep authorizing experience and expertise. We work with all types of authorizers (district, state, higher education, and special purpose) around the country. The Institute is well positioned to quickly build rapport and earn the respect of your key stakeholders in order to produce a meaningful and actionable evaluation report.

Charter School Accountability

We understand that “what gets measured gets done” and through our A-GAME (Assess—Global access, Academics, Mission, and Equity through Engagement) initiative, we support authorizers in revisiting academic accountability to incorporate more than compliance. Through this work, the Institute, in collaboration with Momentum Strategy & Research, supports authorizers in creating meaningful frameworks. Recent engagements include: Massachusetts Elementary and Secondary Education, Delaware Department of Education, Arizona Charter School Board, Riverside, Inyo, and Los Angeles Counties’ offices of education (CA) and the Thomas B. Fordham Foundation (OH). All have adopted frameworks for some or all of their public charter schools that include more than compliance and traditional measures of school quality. Previously, as the former deputy director of the D.C. Public Charter School Board, Naomi Rubin DeVeaux, a partner in the A-GAME work and lead on this proposal, oversaw the creation of financial, academic, and operational accountability of over 100 public charter schools and navigated the process of adopting new measures and frameworks with the seven-member appointed board, the school leaders, and parent stakeholders. She also helped the state develop their statewide accountability framework to meet federal requirements. In addition, Cindy Shuhmacher, an Institute consultant, is available to support adoption of financial measures. Cindy ran Central Michigan University’s authorizing agency and built their financial oversight tools. She has helped authorizers across the country develop customized frameworks, including a number of authorizers in Michigan, South Carolina, and authorizers in Oklahoma through their charter resource center.

Our Organization, Values & People

As a mission-driven, non-profit 501(c)3 organization, the Institute is committed to inspiring, equipping, and supporting people and organizations striving to improve education for all students.

- We value the transformative power of education and want all people to have the opportunity to grow and reach their full potential.
- We value people and relationships and are relentless about fulfilling our promises and treating people with respect.
- We are collaborative and always strive to build relationships of mutual trust and respect.
- Our team has founded, taught in, and operated schools, served on governing boards, led authorizing agencies, started and run state charter support organizations, coached in NACSA’s leadership program, presented at numerous state and national conferences, trained authorizers; guided facility financings, supported school turnarounds, closed underperforming schools, and have earned the trust and confidence of influential leaders through the quality of their work and personal integrity.

- The Institute is financially strong and transparent. Governed by a diverse nine-member board, annual revenues exceed \$7 million and our annual audit and certificates of insurance will be provided upon request.

Project Plan

Local Context and Desired Outcome: Every state is unique and one-size-does-not-fit-all. Understanding and creating a framework that supports what New Mexico families, communities, and stakeholders value is the first step.

- ❖ Review all documents and materials developed to date
 - Survey results
 - Draft Framework
 - Existing State Accountability
- ❖ Discussions (if needed because not captured in documents)
 - Director
 - Commissioners
 - School Leader(s)
 - Other Stakeholders (with the recommendation of the Director)

Framework Design: Ensure that the Framework measures what matters most to the PEC, CSD, the School Leaders, and Families

- ❖ Discuss findings with working group and ensure that there is alignment between the current draft framework and what should be measured
 - Academics
 - Operational
 - Finance
- ❖ Build Framework
 - Facilitate weekly 1.5 hour virtual working sessions with working group (up to 20) beginning upon contract execution through December board meeting and vote to adopt.
 - Between sessions: conduct research, analyze data, update draft
 - Determine what is “good enough” for each indicator to establish targets
 - Using the Results-Based Accountability (TM) already adopted by CSD and PEC for oversight, the facilitator will ensure that the goals are designed to capture the four elements of Results-Based Accountability:
 - Understanding where schools are strong and where they need support,
 - Supporting schools’ internal continuous improvement efforts,
 - Identifying and celebrating promising practices and programs, and
 - Providing the PEC and individual schools with data and stories that help communicate a meaningful and positive narrative about New Mexican students, communities, and schools.
 - Keeping in mind these expected outcomes, the facilitator will structure each discussion around the extent to which the proposed goal(s) for each indicator will provide the needed information.
 - Using the three-tiered rating system, the Facilitator will support creating definitions of “Success Criteria” that align with state expectations, CSD expectations, and reasonable expectations of schools.
 - Meets or Exceeds Success Criteria
 - Working to Meet Success Criteria

- Falls Far Below Success Criteria
- Academic
 - Support the continued adoption and development of goals that show school development within the performance areas:
 - Mission Implementation through Education Program
 - Support for teachers and staff
 - Culture and linguistic responsiveness
 - School climate
 - Family engagement
 - State Accountability System
 - Outcomes for Special Student Populations
 - For any area where the school creates its own measure or is responsible for the data collection and analysis, the facilitator will take the working group through a short process to ensure that the results will be valid and reliable and not lead to bias.
- Operational
 - Using research gathered from authorizers across the country, determine the key features of a strong operational framework for New Mexico
 - Ensure measures focus on outputs
 - Governing Council Membership and Training
 - Equitable Enrollment Processes
 - Compliance with PED Requirements
 - Recurrent Enrollment
- Financial
 - Determine a direction for financial monitoring based on vision for financial oversight and monitoring
 - Support the adoption of key performance indicators for each of the following performance areas:
 - Healthy Financial Practices
 - Qualified Personnel
 - Responsible Expenditures
 - Ensuring Sustainability
 - Reporting and Compliance

Change Management: Change is always hard. While creating opportunities for all community members to weigh is time consuming, it provides for smoother implementation and enforcement. Members to consider are:

- ❖ Working Group
- ❖ PEC Members
- ❖ PED/CDS Staff
- ❖ School Leaders
- ❖ School Board Members
- ❖ Families
- ❖ Other stakeholders, as identified by the PEC/PED, such as charter support organization(s)

Final Framework

- ❖ Synthesize results from all and compile final framework for dissemination
- ❖ Ensure final copy is error-free

Estimated Timeline

Topic		# of Sessions (estimate)	Week of... (subject to change, based on holidays, vacations, availability, and complexity)
Introductions and Overview. Determine Academic & Operational Structure. Establish how and when to incorporate input from outside working group		1	Jul 25
For each of the performance categories, it will be important to think through the types of data that you would accept, the process that you will use to collect data/analysis, and how you will verify its authenticity. We will include this in our discussion. Altogether, I think this will take five weeks, as these are complicated measures with many different approaches.			
1.A	The school's education program effectively supports comprehensive mission implementation, student academic success, and overall student well-being.	1	August 1
1.B	Teachers and staff receive effective professional support to ensure they are able to execute the schools' mission and support students' academic and overall personal growth.	1	Aug 8
1.C	Students' experiences honor their culture, language, and identity – and prepare them for a multicultural world. Moreover, student learning in these domains is fully integrated into the schools' academics and processes.	1	Aug 15
1.D	The school provides the necessary resources and creates a robust environment that supports students' sense of belonging and helps students develop positive relationships, social and emotional well-being, and competencies for a multicultural world. A successful school climate should be measured across the following three domains: <ol style="list-style-type: none"> 1. Positive staff-student relationships 2. Equitable behavior interventions and support 3. Effective social-emotional learning Each of the above domains must be measured.	1	Aug 22

Topic		# of Sessions (estimate)	Week of... (subject to change, based on holidays, vacations, availability, and complexity)
1.E	The school effectively engages and partners with families to together improve students' academic growth and overall well-being.	1	Aug 29
The State assessment data seems to be completed. However, we may want to spend part of a session or an entire session reviewing and finalizing.			
2.A	The school ensures sufficient continuous enrollment of students – and ensures those students meet or exceed the expectations established by PED for all New Mexican students, including sufficient academic achievement and academic growth.	1	Sep 5
2.B	The school ensures special populations (low-income students, Native American students, English language learners, students with disabilities, and any other populations identified by PED as a special population) ² have equitable access to and successful involvement in the educational program.		
Some of the performance areas seem completed—we can focus on building out the others. I estimate 3 days total for Operational.			
3.A	The governing council understands and effectively executes its duty to the school.	1	Sep 12
3.B	The school ensures equitable advertising, access and enrollment processes so all families feel welcomed and have equitable opportunities to apply and enroll at the school.	1	Sep 19
3.C	The school complies with all appropriate PED requirements.	.5	Sep 26
3.D	The school ensures sufficient continuous enrollment of students.	.5	
If you have decided on this framework, the step will be to create the KPI (key performance indicator(s) for each performance area. I anticipate 3.5-four days total.			

Topic		# of Sessions (estimate)	Week of... (subject to change, based on holidays, vacations, availability, and complexity)
3.A	The school is following Public School Code and demonstrates its use of healthy financial practices.	.5	Oct 3
3.B	The school is adequately staffed to ensure proper fiscal management.	.5	
3.C	The school responsibly prioritizes its expenditures.	1	Oct 10
3.D	The school manages finances to ensure sustainability.	1	Oct 17
3.E	The school meets financial reporting and other financial compliance requirements.	.5	Oct 25
Final Review		1	Nov 7
Deliverable			Cost
15 Facilitated Virtual Sessions			\$4,500
Preparation, research, data analysis, etc.			\$12,600
Final product (design and copyediting)			\$500
Total			\$17,600

The total price is negotiable. If the scope of work is acceptable, we will work with your budget to provide you with the best possible product.

Project Personnel

Naomi Rubin DeVeaux

Dedicated to serving families through quality public school choice, throughout her career, Naomi Rubin DeVeaux seeks to publish transparent and actionable school performance information. She has held leadership positions in authorizing agencies, charter support organizations, served on school boards, and taught in public schools. Currently, Naomi is a partner with the National Charter Schools Institute where she works on authorizer and school governance and academic oversight. Naomi previously served as the Deputy Director of DC Public Charter School Board, where she developed an innovative suite of school evaluation tools. She was previously the Deputy Director of Friends of Choice in Urban Schools. She began her career in education as a high school English and literacy teacher at district and charter schools. She is vice chair of the DC Bilingual Public Charter School board and a two-term board member of Education Board Partners (formerly Charter Board Partners). She is a member of the Coalition of Learner Equity, a Pahara – Aspen education leader, and began her teaching career as a Fulbright scholar in Germany.

Cindy Shumacher

As a consultant to the National Charter Schools Institute, Cindy supports charter school authorizers develop financial scorecards and oversight tools. Until 2018, Cindy was the executive director of the Center for Charter Schools at Central Michigan University, a nationally-recognized statewide charter school authorizer where she oversaw the strategic development and implementation of programmatic initiatives that focused on improving school performance outcomes for a diverse portfolio of 57 charter schools. Prior to being named the executive director, Cindy lead the governance, academic, fiscal and operational units and she helped develop nationally recognized financial oversight systems. She is a NACSA New Leaders Coach and often presents on financial oversight at NACSA and other conferences. Cindy graduated with a master's degree with an emphasis in accounting from Central Michigan University. Prior to being involved with charter schools, she practiced as a certified public accountant and served as an internal auditor.

References

- Kathryn Upton, Executive Director, Thomas B. Fordham Foundation, kmullenupton@fordhamfoundation.org
- John Carwell, Charter Office, Delaware Department of Education john.carwell@doe.k12.de.us
- Alison Bagg, Director, Massachusetts Department of Education, alison.w.bagg2@state.ma.us