



STATE OF NEW MEXICO
PUBLIC EDUCATION DEPARTMENT
300 DON GASPAR
SANTA FE, NEW MEXICO 87501-2786
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RYAN STEWART, ED.L.D.
SECRETARY DESIGNATE OF EDUCATION

MICHELLE LUJAN GRISHAM
GOVERNOR

Analysis of Renewal Application and Site Visit

Monte Del Sol Charter School

School Address: 4157 Walking Rain Rd, Santa Fe, NM 87507

Head Administrator: Robert Jessen

Business Manager: Maria Fidalgo

Authorized Grade Levels: 7-12

Authorized Enrollment Cap: 360

Current Enrollment: 364

Contract Term: July 1, 2015 through June 30, 2020

Mission: Monte del Sol Charter School educates and inspires Santa Fe's diverse population in grades 7 through 12, by building strong relationships and creatively engaging the local and global community.

To do this, Monte del Sol Charter School will:

- provide a small school so each individual is known;
- acknowledge and celebrate the diversity of its members and the community;
- connect students with adult community members through the mentorship program;
- foster awareness of the world through international trips, student exchanges, special events and curricula;
- engage students in the arts through events, activities, and curricula;
- teach the importance of environmental sustainability in our curricula and through participation in the garden.

PART A:	<p>Data analysis provided by CSD is attached</p> <p>Please see Part A - Summary Data Report based on accountability and reporting data from Current Charter Contract term</p>
PART B:	<p>Progress Report provided by the School is attached</p> <p>Please see Part B for the school’s self-report on the progress of meeting the academic performance, financial compliance and governance responsibilities of the charter school, including achieving the goals, objectives, student performance outcomes, state standards of excellence and other terms of the charter contract, including the accountability requirements set forth in the Assessment and Accountability Act during the Current Charter Term.</p>

The PED team reviewed the school’s Part B (Progress Report) and conducted a renewal site visit on October 15, 2019.
Ratings are based on the rubric provided in the application.

Section	Indicator	Final Rating
ACADEMIC PERFORMANCE		
1.a	<p>Department’s Standards of Excellence— A-F School Letter Grades</p> <p>Schools that have maintained a C or better letter grade over the term of the contract <u>AND</u> have not earned a D or F in any <u>indicator</u> of the letter grade in the past two years do <u>NOT</u> complete this Section.</p> <p>Overall NM School Grades SY16 - SY18: D, C, and D</p> <p>Current Standing: F, F, and F</p> <p>School Improvement: F, D, and F</p> <p>Higher-Performing Students: D, D, and D</p> <p>Lowest Performing Students: F, F, and F</p> <p>Graduation: C, C, and D</p> <p>College and Career Readiness: B, A, and D</p>	<i>Failing to Demonstrate Substantial Progress</i>
1.b	<p>Specific Charter Goals</p> <p>Schools that have met all of their school specific goals in each year of the contract term do <u>NOT</u> provide a narrative.</p> <ul style="list-style-type: none"> • SHORT CYCLE ASSESSMENT READING Rating for SY19: Does Not Meet • SHORT CYCLE ASSESSMENT MATH Rating for SY19: Meets • SHORT CYCLE ASSESSMENT MATH Q1 Rating for SY19: Exceeds • Increase GPA through mentorship. INNOVATIVE INDICATOR: The PEC and the parties agree that this indicator will not be used as a basis for non-renewal. Rating for SY19: Meets 	<i>Demonstrates Substantial Progress</i>
FINANCIAL COMPLIANCE		
2.a	<p>Audit</p> <p>Schools that have received no material weakness, significant deficiency, or repeat audit findings in each of the annual audits during the term of the contract do <u>NOT</u> complete this Section.</p> <p>During FY16-FY18, the school had eighteen (18) audit</p>	<i>Failing to Demonstrate Substantial Progress</i>

	findings, including six (6) repeats and six (6) material weaknesses or significant deficiencies.	
2.b	Board of Finance Schools that have maintained all Board of Finance authority during the entire term of the contract do <u>NOT</u> complete this Section. If required to complete this section, provide a narrative explaining the actions taken (improved practices and outcomes).	<i>Meets the Standard</i>
CONTRACTUAL, ORGANIZATIONAL, AND GOVERNANCE		
3.a	Material Terms All schools must provide a response for this section of the application.	<i>Meets the Standard</i>
3.b	Organizational Performance Framework Schools that do not have any repeated “working to meet” ratings or any “falls far below” ratings on the most recent organizational performance framework evaluation do <u>NOT</u> complete this Section. <ul style="list-style-type: none">● Indicator 1d Students with Special Needs● Indicator 1e English Language Learners● Indicator 1g Recurrent Enrollment● Indicator 2a Financial Compliance● Indicator 2b GAAP● Indicator 4c Background Checks● Indicator 5a Facilities Requirements● Indicator 5b Health and Safety Requirements	<i>Demonstrates Substantial Progress</i>
	Any OCR complaints or formal special education complaints, identify those, provide all communication related to those, and describe the current status in Appendix, referenced in narrative by name. List complaints	<i>None Known</i>
3.c	Governance Responsibilities All schools must provide a response for this section of the application.	<i>Demonstrates Substantial Progress</i>

PART C:	Financial Statement is attached 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 or comparable organizations and that is in a format required by the department.
PART D	Affidavits for Petitions are attached 1. A petition in support of the charter school renewing its charter status signed by not less than sixty-five percent of the employees in the charter school, with certified affidavit. Number: <u>40</u> Percentage: <u>93</u> %
	2. A petition in support of the charter school renewing its charter status signed by at least seventy-five percent of the households whose children are enrolled in the charter school, with certified affidavit. Number: <u>272</u> Percentage: <u>83.7</u> %

PART E:	<p>Description of the Charter School Facilities and Assurances are attached A 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.</p>
	1. A narrative description of its facilities
	2. Attach ___ facility plans or <u> X </u> the school’s Facility Master Plan
	3. Attach a copy of the building E Occupancy certificate(s) from <u>City of Santa Fe</u> number <u>02-222</u> <u>Maximum capacity is not listed on the certificate.</u>
	4. Letter from PSFA with the facility NMCI Score indicating that the school meets the requirements of Subsection C of 22-8B-4.2 NMSA 1978 The school’s letter, dated DATE, indicates an NMCI score of <u>21.41%</u> , which is below the current average of 23.07% (lower is better with zero being perfect).
5. Provide assurances that the facilities are in compliance with the requirements of Section 22-8B-4.2 NMSA 1978, including subsections A, C, and D. ___ building is owned by charter school, school district, or government entity; OR ___ building is subject to a lease-purchase agreement; OR <u> X </u> school had provided the appropriate assurances form: <input type="checkbox"/> Public (Cert A) <input type="checkbox"/> Private (Cert B) <input checked="" type="checkbox"/> Foundation (Cert C)	
PART F:	<p>Prior Amendment Requests</p> <ul style="list-style-type: none"> • Amendment request to increase enrollment cap to 380 was denied on 4/7/2017 • Amendment request to amend the food service terms of its contract with the condition that the school provide the approved governing body minutes to the CSD was approved on 1/13/2017.
Interviews	A summary of the Stakeholder Interviews is on the following page.
Other Appendices	The school provided additional appendices that are also attached.
School’s Response	The school may provide a narrative response to this analysis, which is due no later than November 25, 2019. The response should be uploaded to the Web-EPSS 2019-2020 PEC Renewal Application AND sent via email to charter.schools@state.nm.us.

Stakeholder Interviews

Stakeholder interviews were conducted on October 15, 2019 at Monte del Sol. The participants included five (5) parents, five (5) students, and nine (9) teachers. Three (3) acting governing board members were also interviewed plus a potential new member who had not been voted onto the board yet.

All five parents cited the small size of the school as being a major reason for sending their children to Monte del Sol. They all agreed that the small size makes the school feel like a community. Parents reported having positive interactions with teachers. One parent shared that teachers always push his son to be his best and that he is now like a new student earning As and Bs. Another parent mentioned that his daughter has decided what she wants to study after high school thanks to Monte del Sol's mentorship program. The school regularly calls, sends texts, or sends emails to communicate with parents.

Students echoed the feeling of community that the parents discussed. Students felt like they could always go to their peers or their teachers for help when they don't understand their coursework because "the teachers are willing to work with you."

The governing council listed the close relationship between students and teachers, the chemistry of the faculty, and the mentorship program as major strengths of the school. In regards to evaluating the head administrator, last year the governing council developed a new, more in-depth evaluation system after determining the old method to be insufficient. While the board does not have a formal self-evaluation tool, board members had a "retreat" at the beginning of the year. During the retreat, members reflected on what they wanted to be as a board and what they needed to do to support the school. The Finance Committee provides a report to the rest of the governing board during each monthly governing board meeting.

The founding vision of the school, small school environment, student teacher relationships, and freedom to teach what and how they wanted to teach were some of the reasons given for why teachers were attracted to Monte del Sol. Teachers drive school policies along with the administration. While teachers have issue with the current physical space of the school (old portables, lack of classrooms, and no space for sports), they do believe that the currently planned construction will help with those issues.



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Part A: Preliminary Data Report and Current Charter Contract Term

**Monte del Sol Charter School
November 2019**

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).

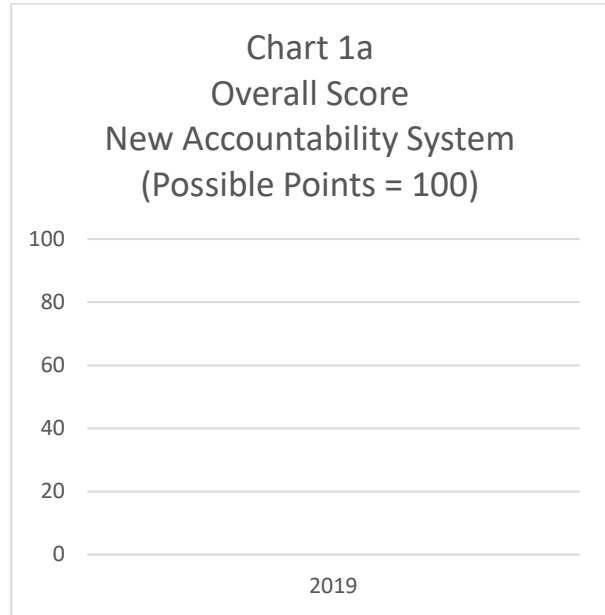
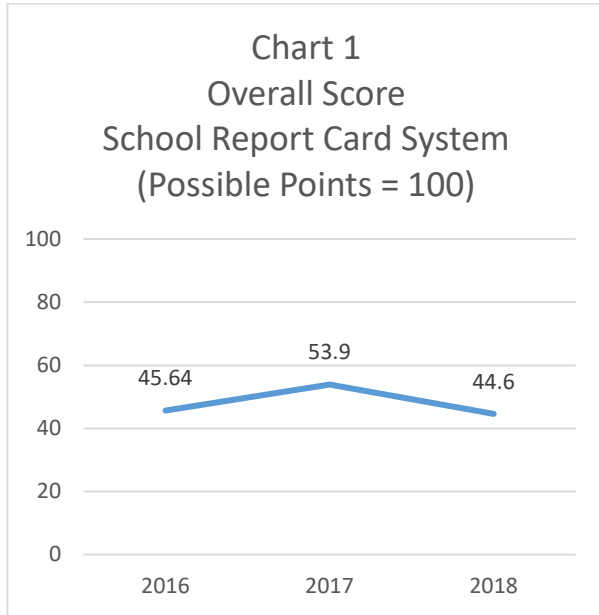
Each school in New Mexico has been included in one of two School Grading systems, either for elementary/middle schools or high schools. Although total possible points for either scheme add up to 100 in which points earned determine a school's letter grade, the two grading systems have different point 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.

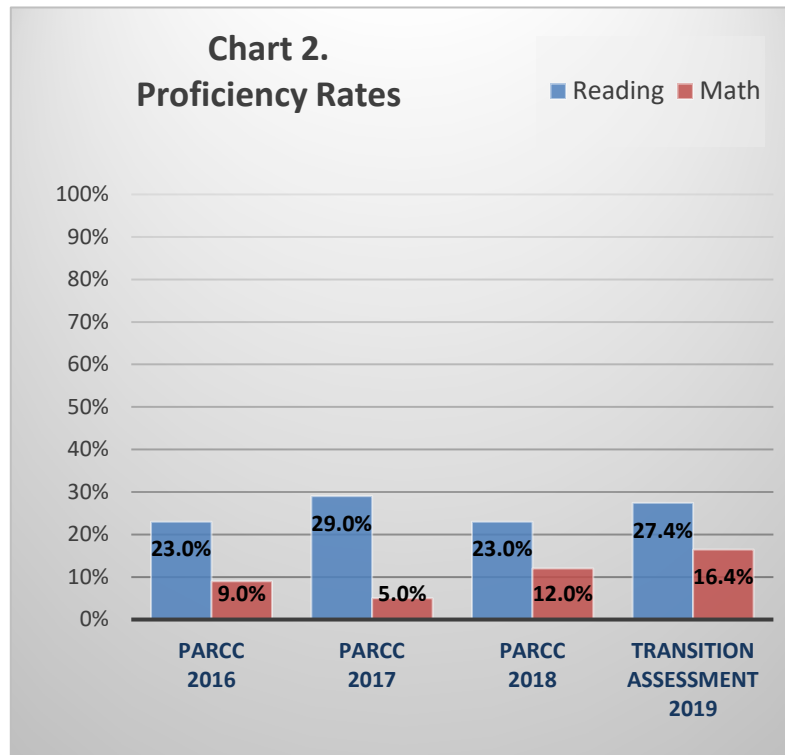
The following pages provide a snapshot of the school's academic performance, including analysis towards meeting the Department's Standards of Excellence for school years 2015-2016, 2016-2017, and 2017-2018 (under the A-F Grading System). **This report will be supplemented with information for 2018-2019, from the new State System of School Support and Accountability, once the reports are released.**

1a. Department's Standards of Excellence

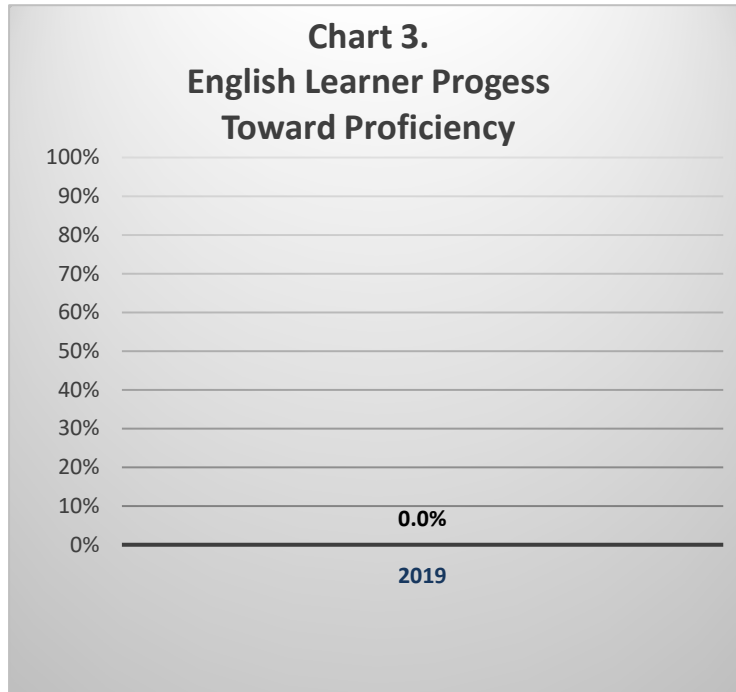
Overall Standing: Charts 1 and 1a illustrate the school's overall score (out of 100 possible points) in each of the last 4 years (FY2016-FY2019).



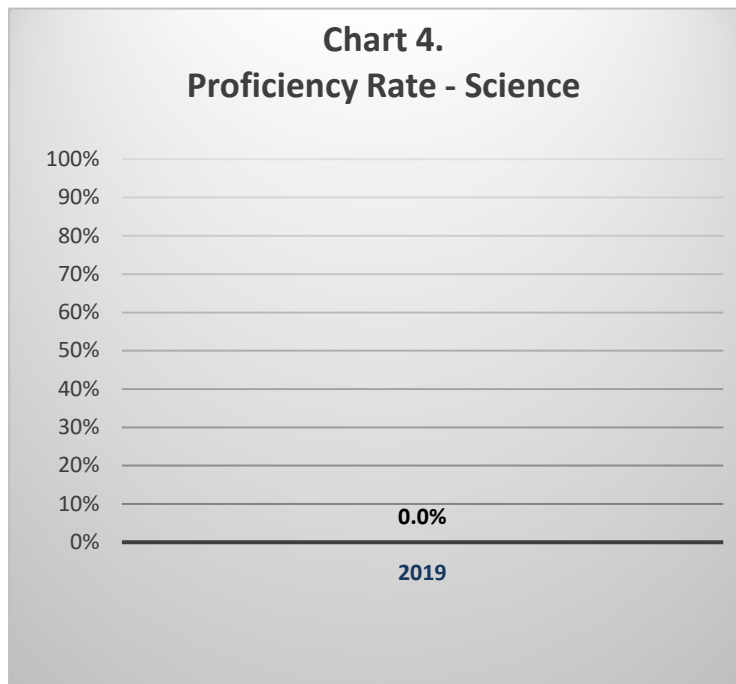
Proficiency Rates: Chart 2 shows the school's proficiency rates in **reading and math** during the four (4) year period.



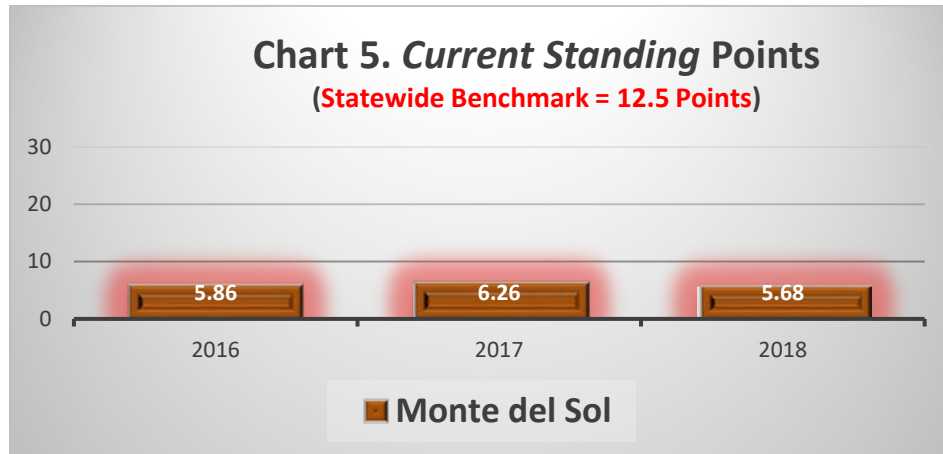
English Learner Progress toward English Language Proficiency: This indicator was added in 2019 and is measured by the WIDA ACCESS assessment given annually to students identified as English Learners.



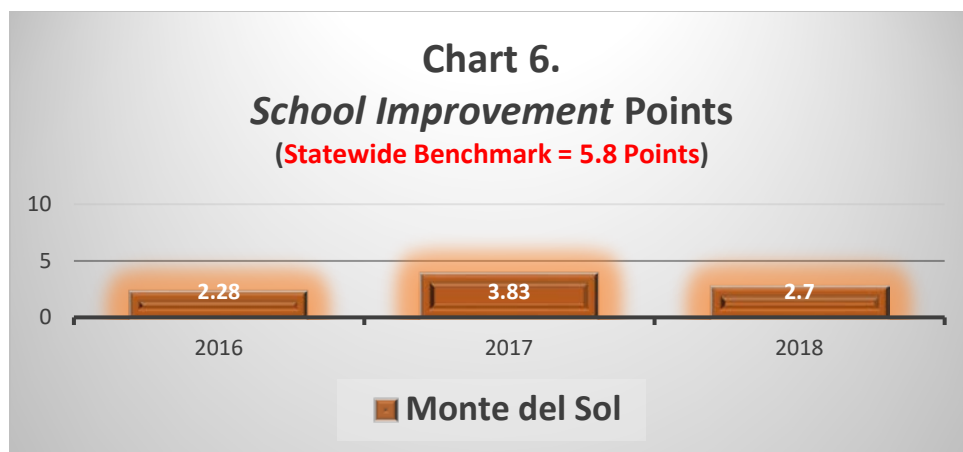
Science Proficiency: This indicator was added in 2019 and Chart 4 indicates the percentage of students who scored at the proficient level on state assessments in science.



Current Standing: Current standing measures both grade level proficiency and student performance, in comparison to expected performance, based on statewide peer performance. The statewide benchmark (established in 2012) was 12.5 points. The school's results for three years are provided in Chart 5. **This measure is not available for 2018-2019.**

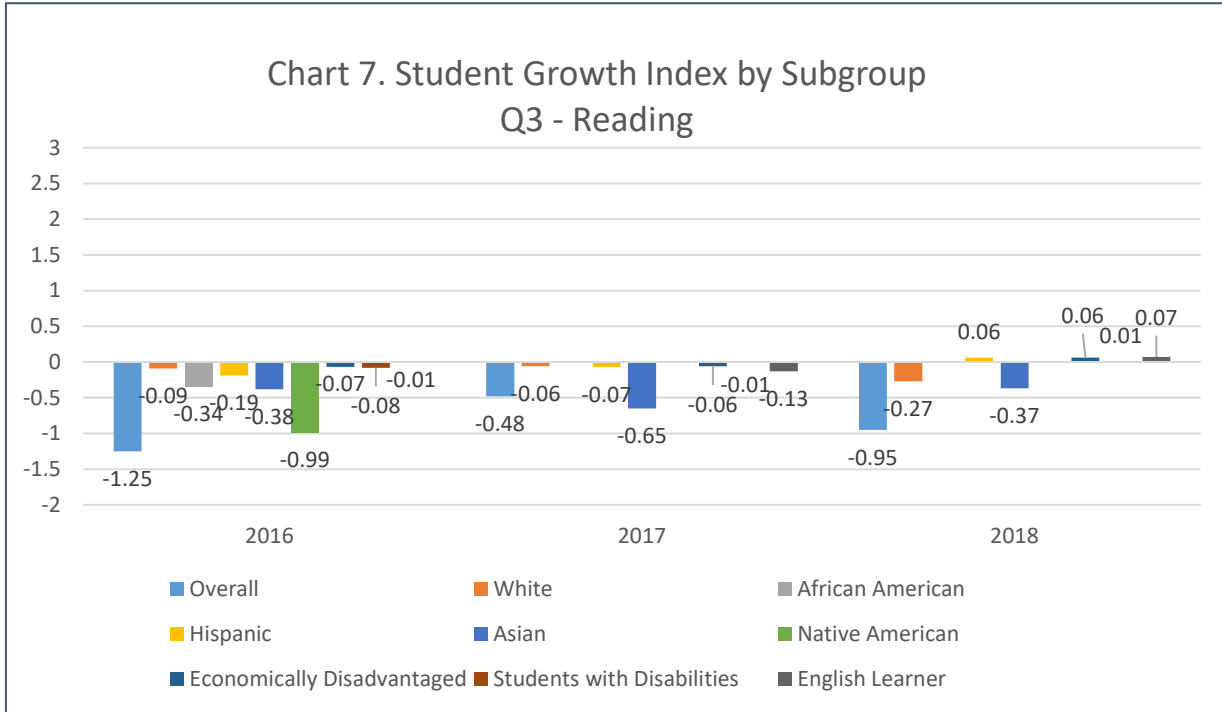


School Improvement: The *school growth/improvement* performance on the School Report compares overall student performance from year to year. Growth can be positive or negative. When it is positive, school performance is better than expected when compared to others schools with the same size, mobility, and prior student performance. Chart 6 shows the school's performance for three years. **This measure is not available for 2018-2019.**



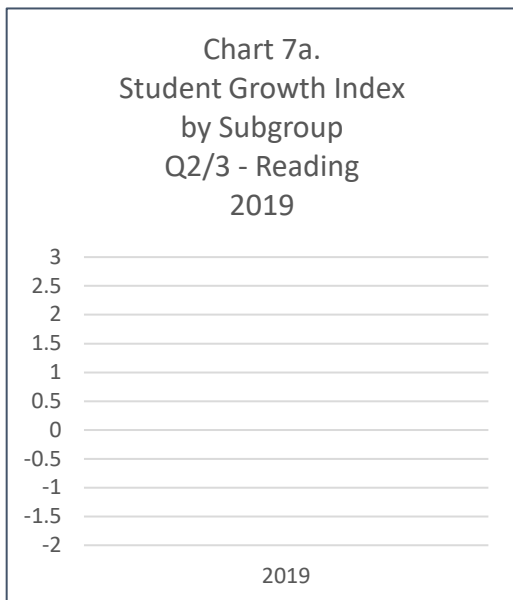
Subgroup – Higher-Performing Students in Reading

SY2016 - SY2018 Q3 Higher-Performing Students (top 75%). This indicator evaluates changes in comparative performance for the school’s higher-performing students (top 75%) for 2015-2016, 2016-2017, and 2017-2018. A growth index of zero (0) indicates expected growth; a positive number is greater than expected and a negative number is less than expected. Subgroups with fewer than 10 students are not displayed in order to mask student identity. **Please note that Q3 was changed to Q2/3 (middle) and Q4 (highest) in 2018-2019.**



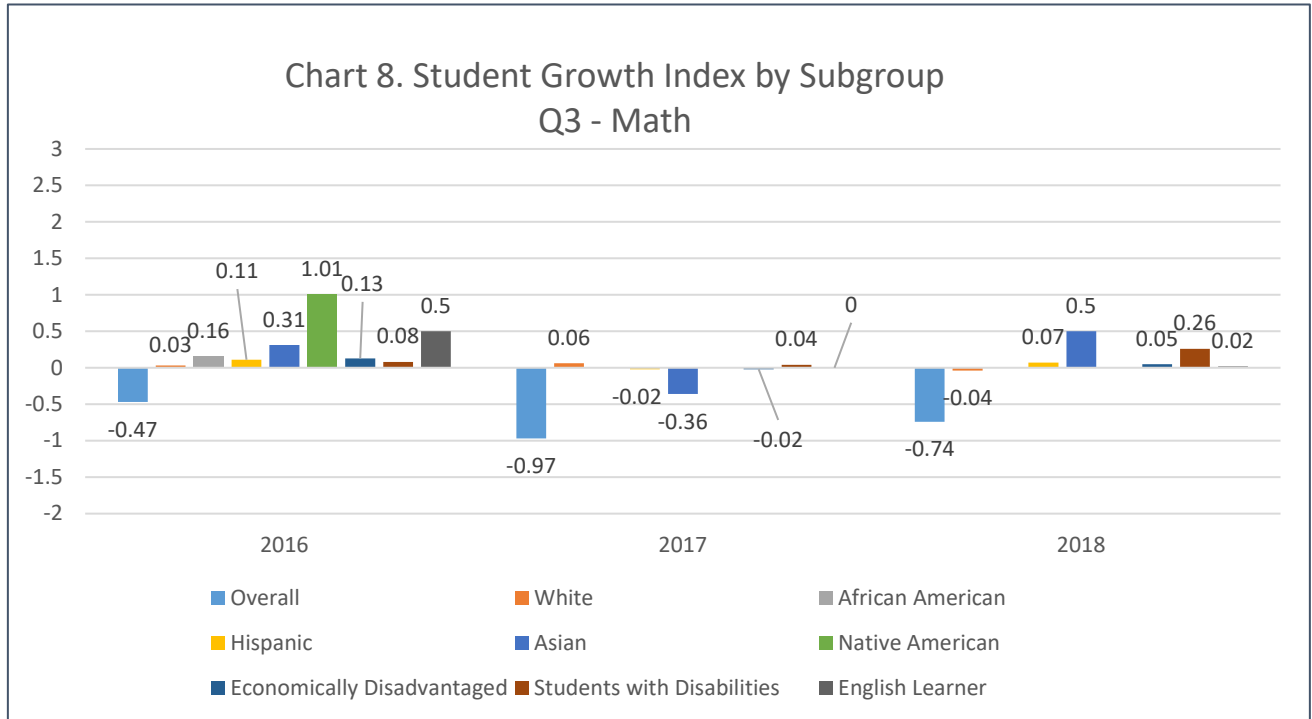
SY2019 Q2/3 Middle-Performing (middle 50%) and Q4 Highest-Performing (top 25%)

Charts 7a and 7b are reserved for the 2019 data for Q2/3 and Q4 in Reading.



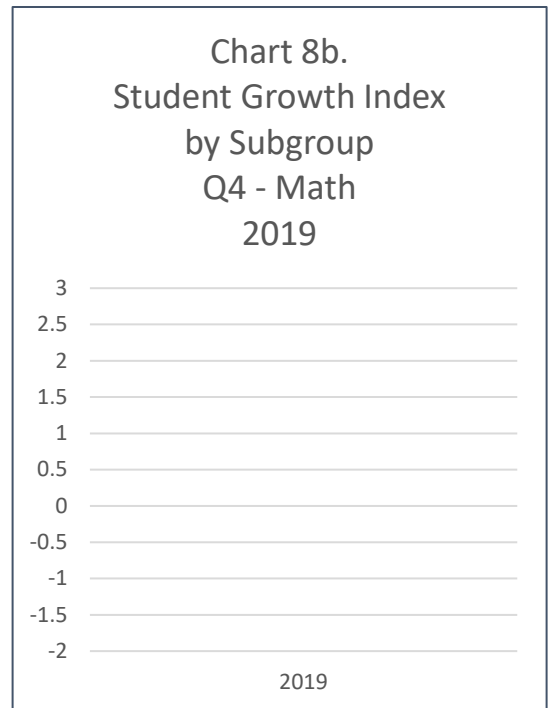
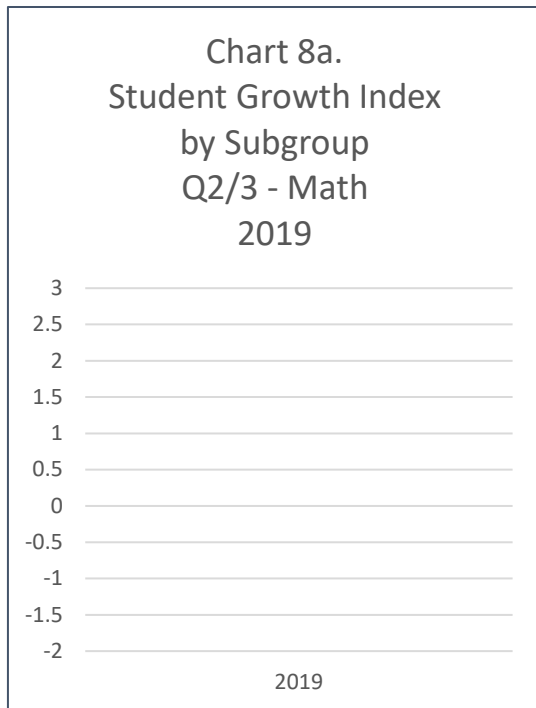
Subgroup – Higher-Performing Students in Math

SY2016 - SY2018 Q3 Higher-Performing Students (top 75%)



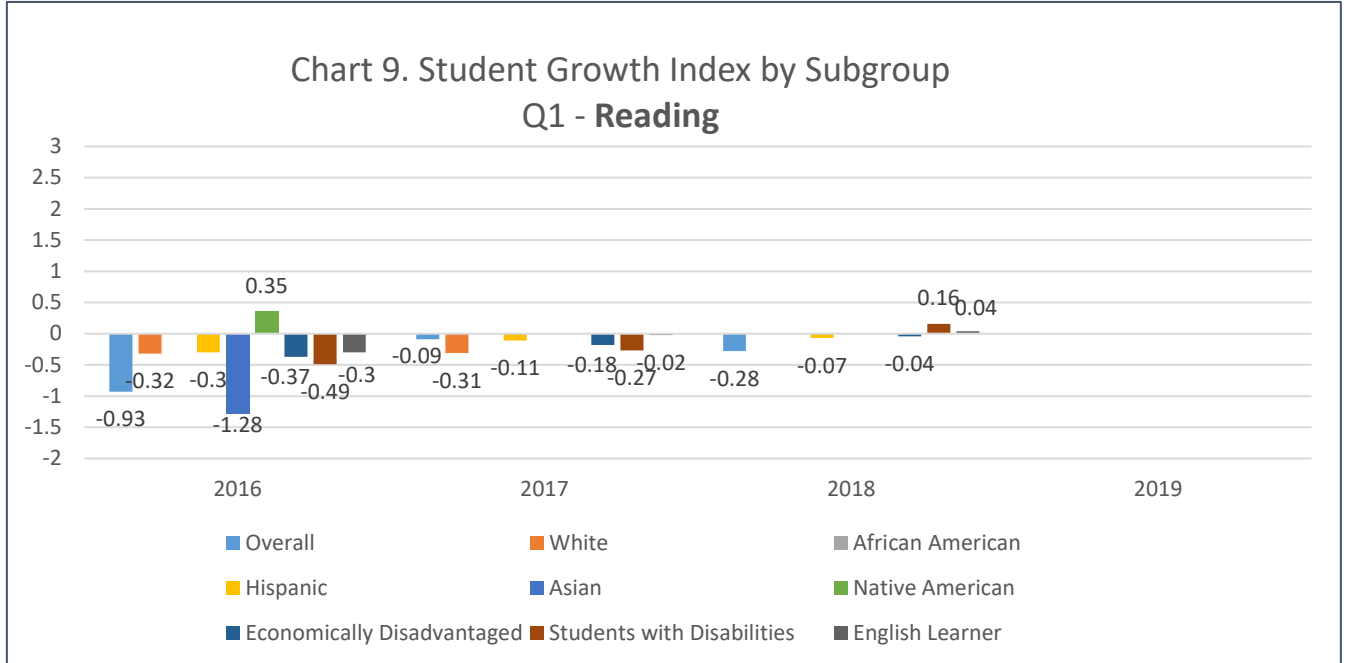
SY2019 Q2/3 Middle-Performing (middle 50%) and Q4 Highest-Performing (top 25%)

Charts 8a and 8b are reserved for the 2019 data for Q2/3 and Q4 in Math.

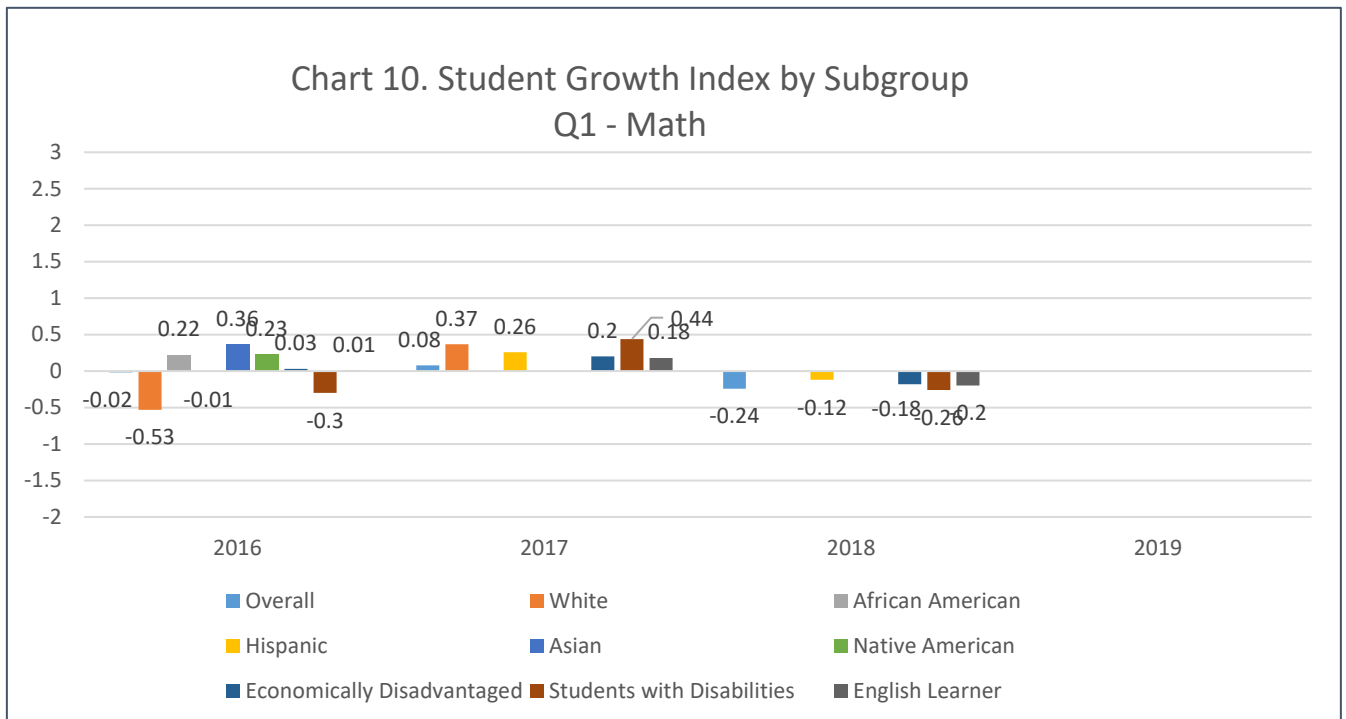


Subgroup – Lowest-Performing Students in Reading

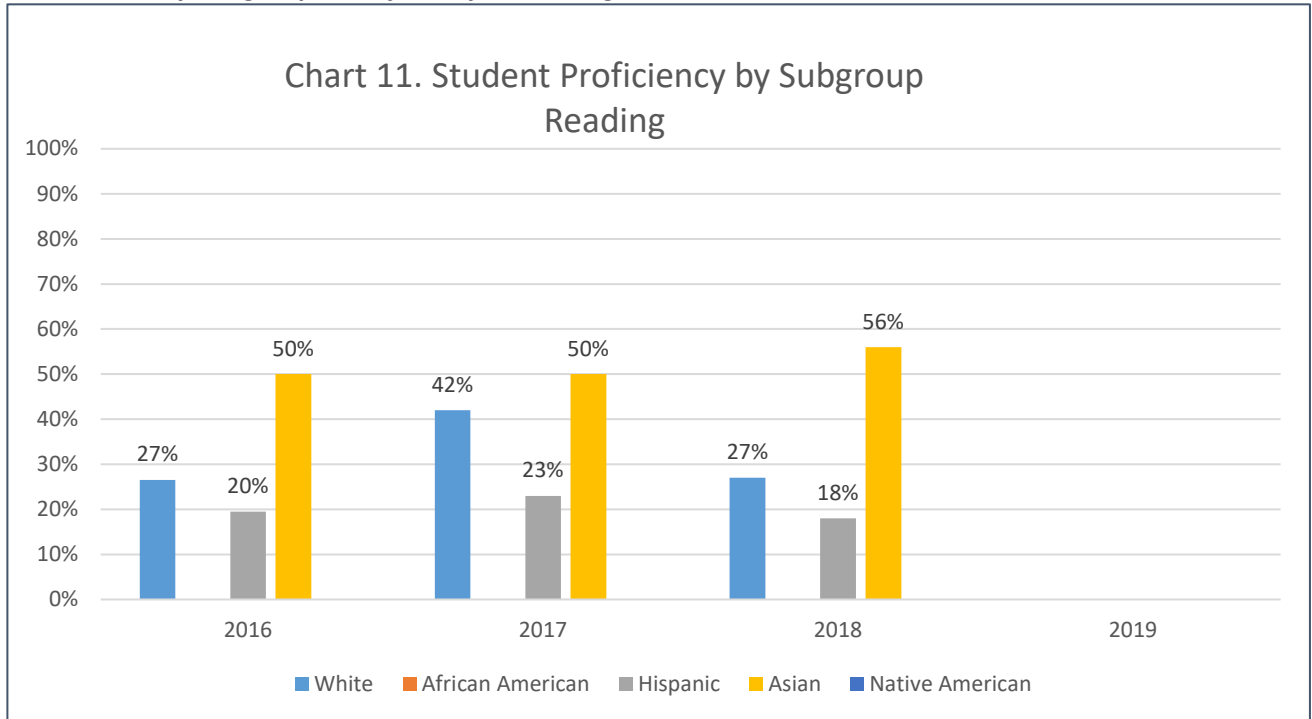
Q1 Lowest-Performing Students (Q1). In Q1 student growth, the indicator evaluates changes in comparative performance for the school’s lowest-performing students (lowest 25%). For some schools data may be masked due to low numbers in a particular category.



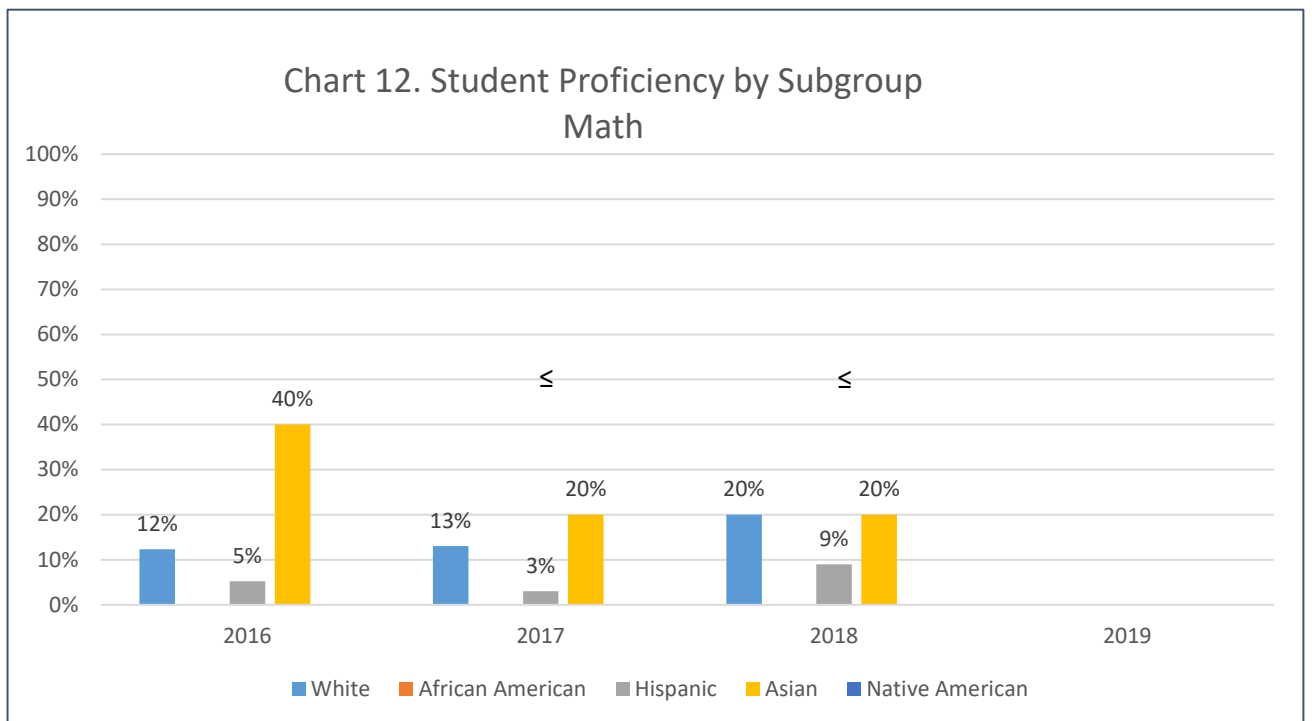
Subgroup – Lowest-Performing Students in Math



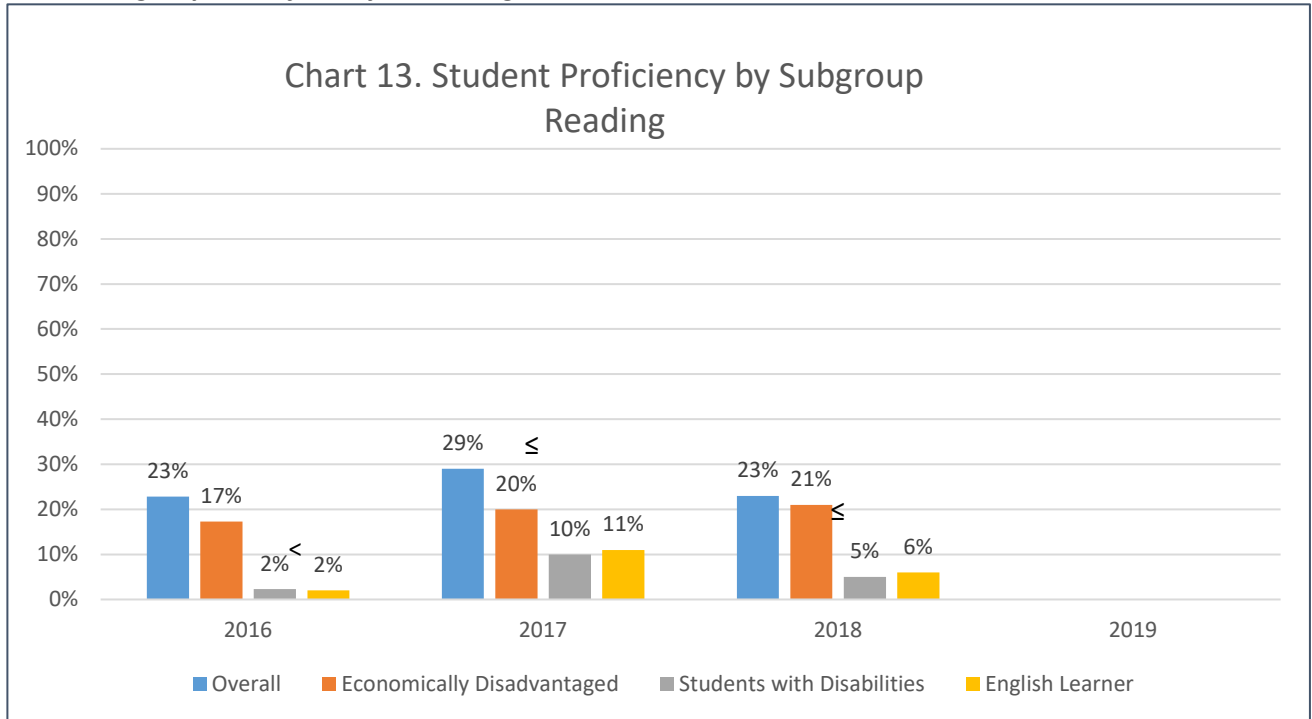
Race/Ethnicity Subgroups - Proficiency in Reading



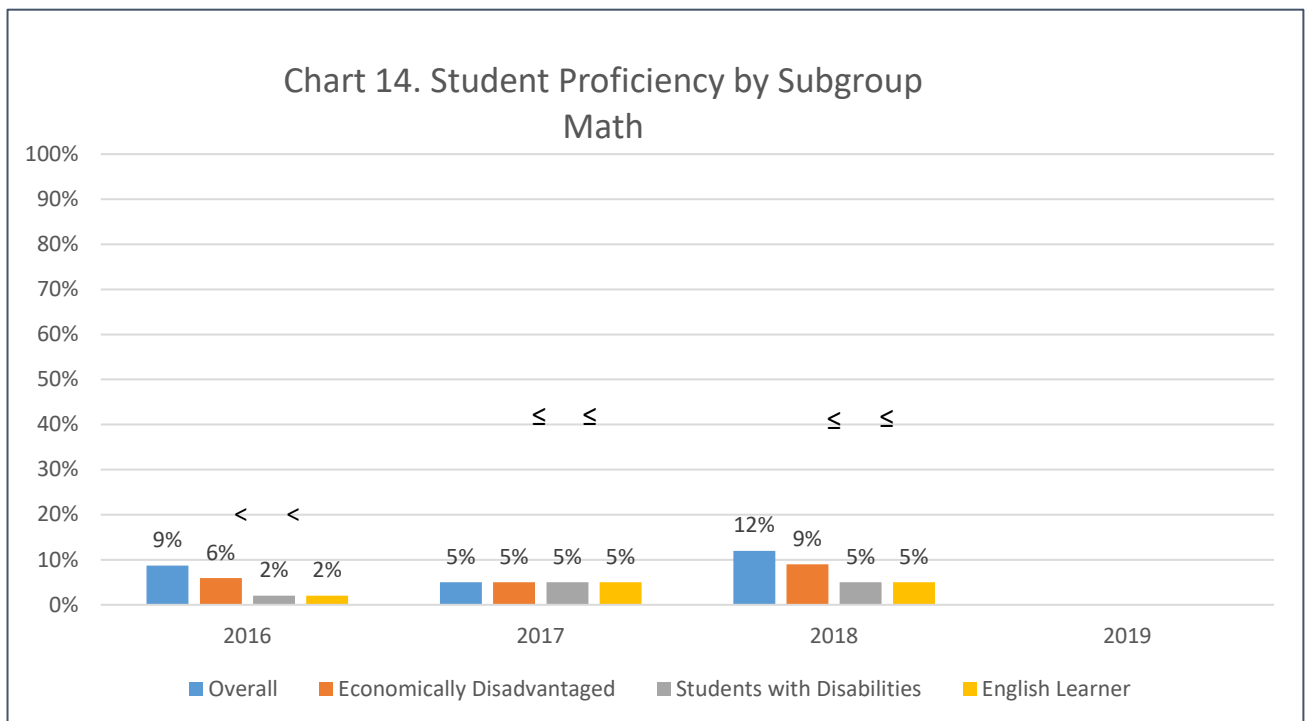
Race/Ethnicity Subgroups - Proficiency in Math



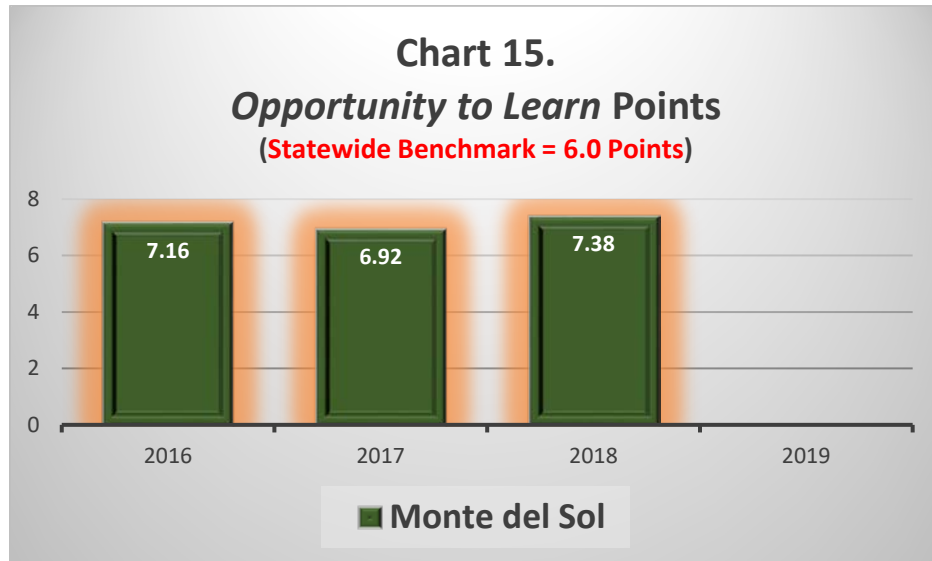
Other Subgroups - Proficiency in Reading



Other Subgroups - Proficiency in Math

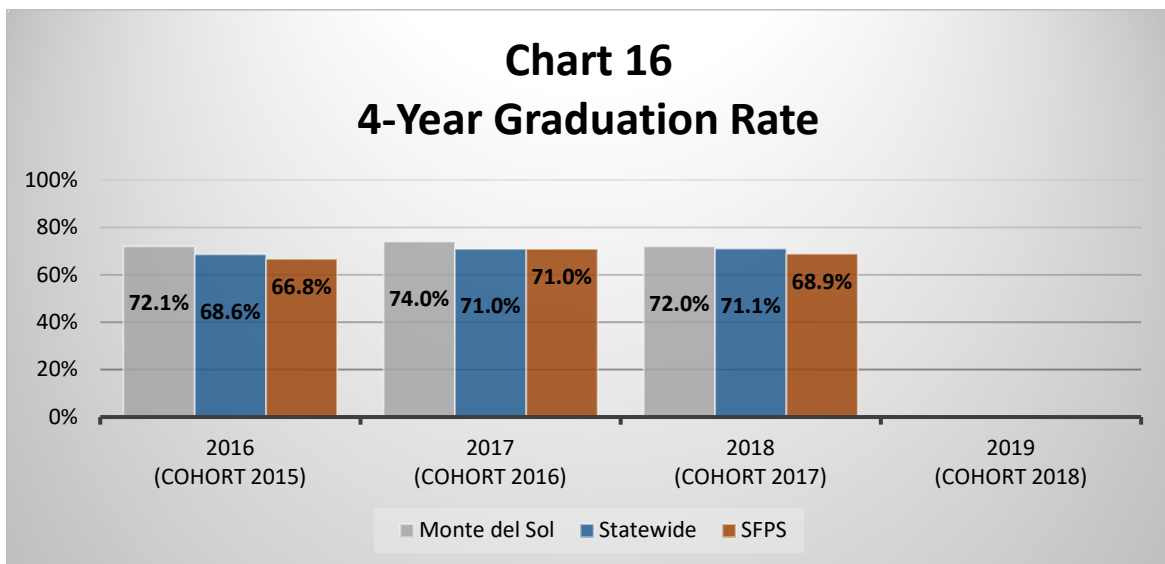


Opportunity to Learn (OTL): Opportunity to learn represents the quality of learning environment schools provide. This indicator is based on attendance and classroom surveys administered to students (or parents in grades K-2). High schools can earn 8 total points (3 for attendance, 5 for the survey). The target for attendance is 95%. Only attendance was assessed in 2016 and scores were not assigned that year. The 2019 NM System of School Support and Accountability used the same Opportunity to Learn Survey. However, this indicator will be changed to the “Educational Climate Survey, Multicultural Initiatives, and Socio-Emotional Learning” in future years.



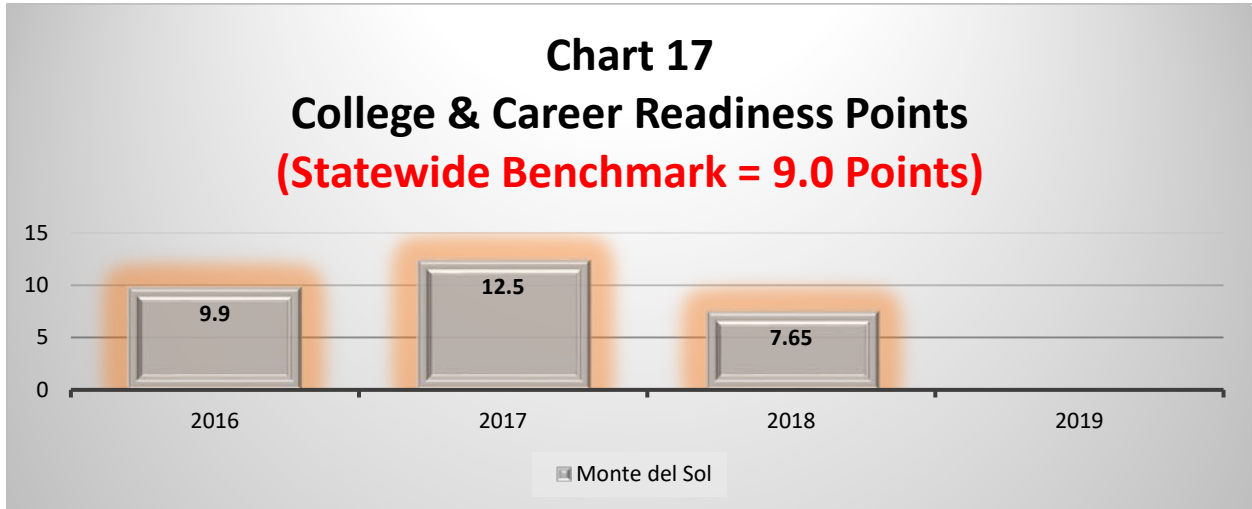
High School Graduation Rates for the 4-year cohort

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 17 illustrates the total *College and Career Readiness* (CCR) points earned during the past four (4) years.



¹ See the “*New Mexico School Grading Technical Guide: Calculation and Business Rules*” document which can be obtained at:
<https://aae.ped.state.nm.us/SchoolGradingLinks/1617/Technical%20Assistance%20for%20Educators/Technical%20Guide%202017.pdf>

1b. Specific Charter Goals

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

Charter Specific Goals

1. **SHORT CYCLE ASSESSMENT READING.** Short Cycle Assessment data (Discovery*) will be used to measure academic growth or proficiency in Reading of Full Academic Year (FAY) students in 7th -11th grade. The school meets the target of this indicator if 75-84% of identified students made at least one full year’s growth in reading short-cycle assessment scores when comparing beginning year results to later results OR The student tests at “achievement level III or IV” on the winter or spring short-cycle assessment.
2. **SHORT CYCLE ASSESSMENT MATH.** Short Cycle Assessment data (Discovery*) will be used to measure academic growth or proficiency in Math of Full Academic Year (FAY) students in 7th -11th grade. The school meets the target of this indicator if 75-84% of identified students made at least one full year’s growth in reading short-cycle assessment scores when comparing beginning year results to later results OR The student tests at “achievement level III or IV” on the winter or spring short-cycle assessment.
3. **SHORT CYCLE ASSESSMENT MATH Q1** Short Cycle Assessment data (Discovery*) will be used to measure academic growth or proficiency in Math of Full Academic Year (FAY) students identified as being in the lowest quartile of students (Q1 students) as shown through the scores of the fall Discovery assessment. The school meets the target of this indicator if 60-74% of identified students made at least one full year’s growth in math short-cycle assessment scores when comparing beginning year results to later results OR The student tests at “achievement level III or IV” on the winter or spring short-cycle assessment.
4. **Increase GPA through mentorship.** The school will meet the standard if 50 - 59 % of students who took a mentorship the previous year will show .3 increase in their Annual GPA when comparing the Annual GPA from the previous year to the current year’s Annual GPA OR has a 3.5 Annual GPA or above. **INNOVATIVE INDICATOR:** The PEC and the parties agree that this indicator will not be used as a basis for non-renewal.

*Discovery was discontinued; the school now uses NWEA.

Figure 2. Progress towards Charter Specific Goals.²

	Goal 1	Goal 2	Goal 3	Goal 4
2016	Does Not Meet	Falls Far Below	Falls Far Below	Did Not Meet
2017	Falls Far Below	Falls Far Below	Falls Far Below	Did Not Meet
2018	Does Not Meet	Does Not Meet	Meets	Meets
2019	Does Not Meet	Meets	Exceeds	Meets

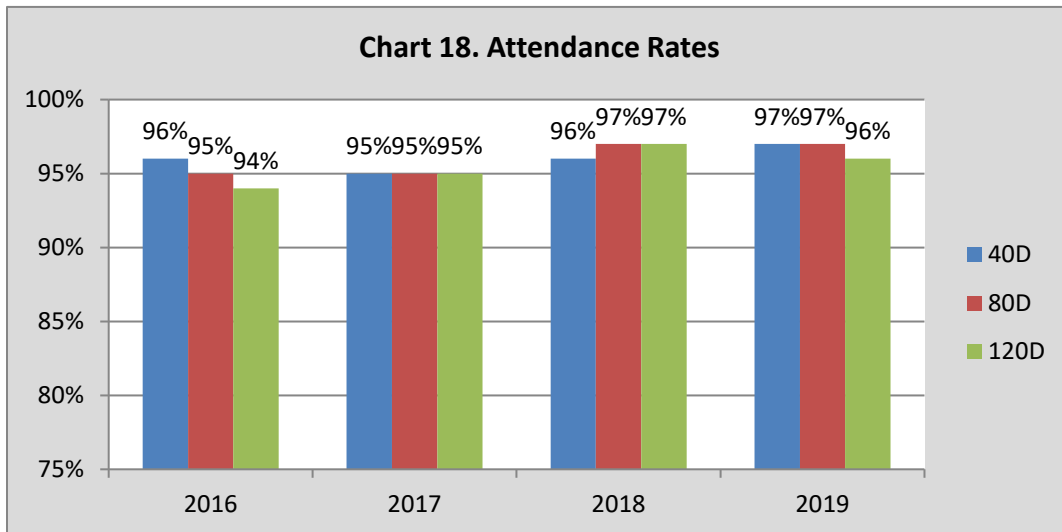
² Charter Specific Goals are referred to as “Mission-Specific Indicators” or “Performance Indicators” in the school’s contract and performance framework.

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.)

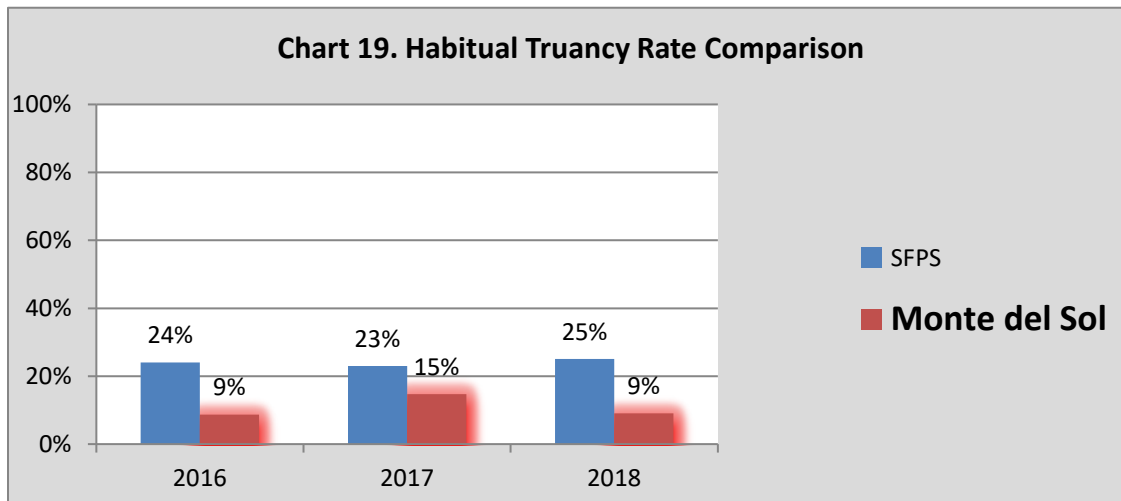
Source: STARS → District and Location Reports > Template Verification Reports > Student > Student Summary Attendance Verification



Habitual Truancy (The statewide target is 2% or less.)

Chart 19 reflects the school’s habitual truancy rate compared to the local district.

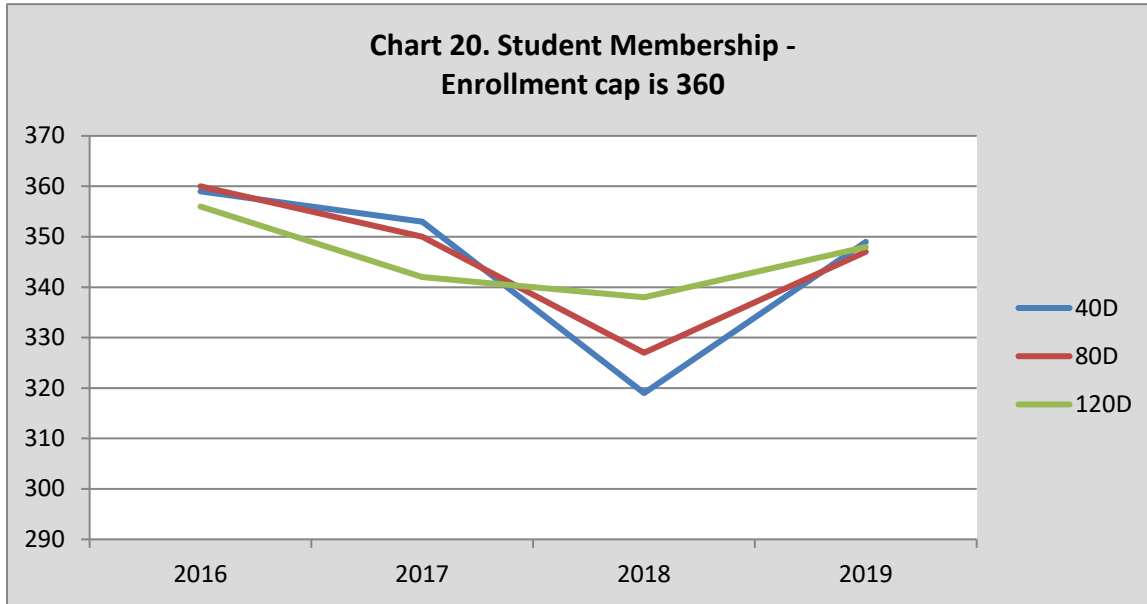
Source: STARS → District and Location Reports → Mobility and Truancy → Habitual Truant Student Totals by District and School



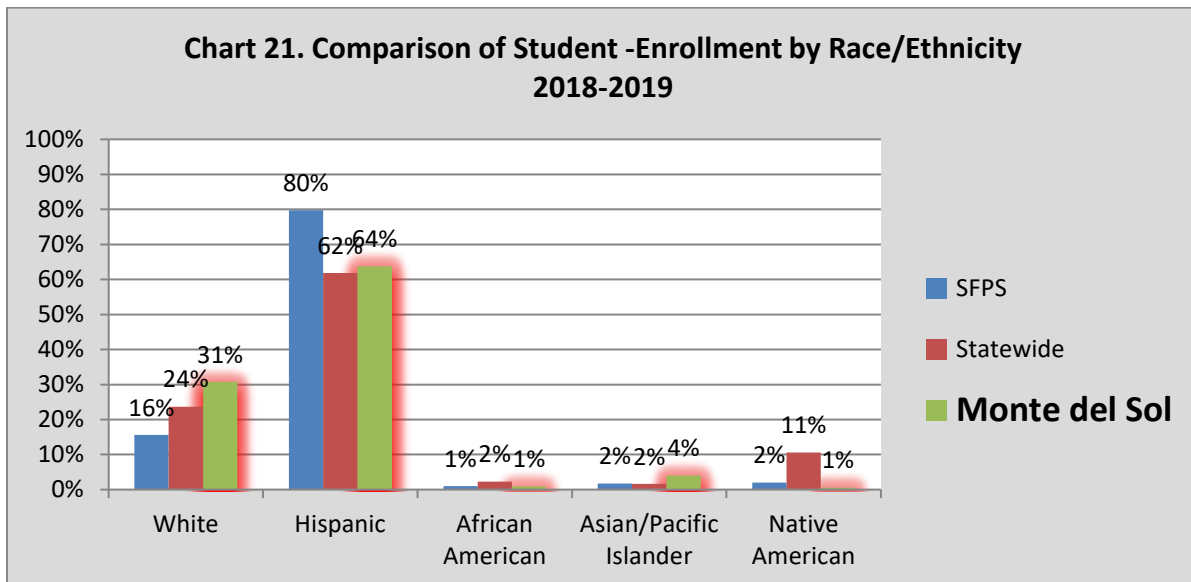
Student Membership (Enrollment)

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 → Membership Reports → Membership – District Detail Report

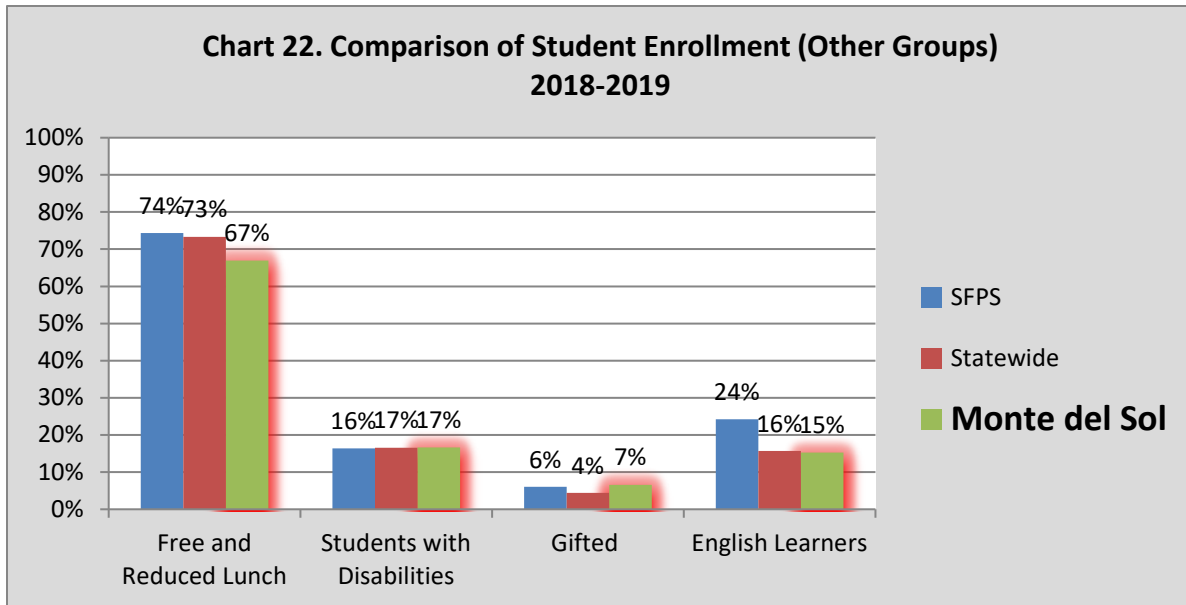


Enrollment by Race/Ethnicity



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

Enrollment by Other Subgroups

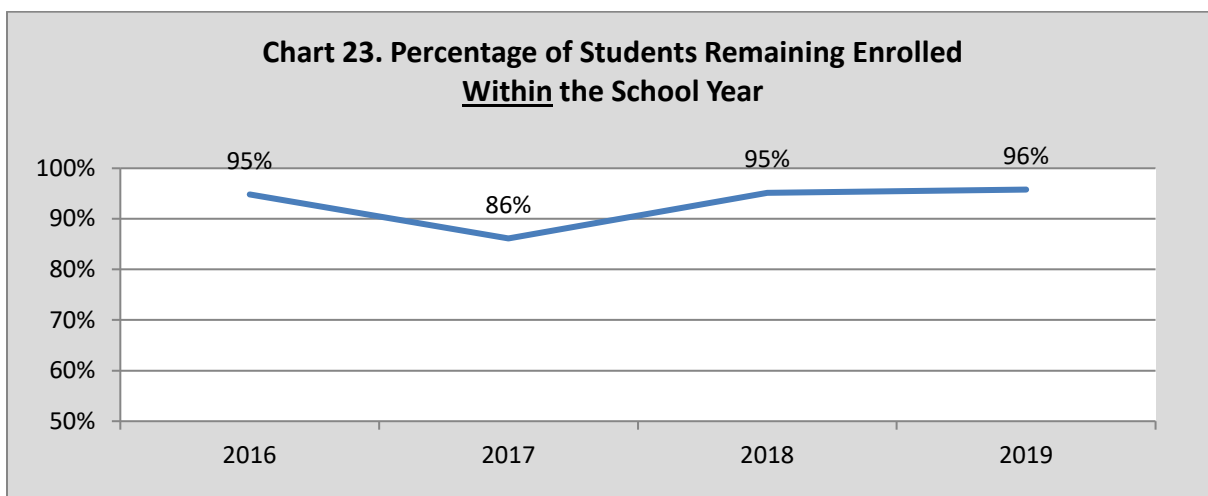


Source: STARS → District and Location Reports → General Reports → Enrollment Subgroup Percentages with Averages

Retention and Recurring Enrollment

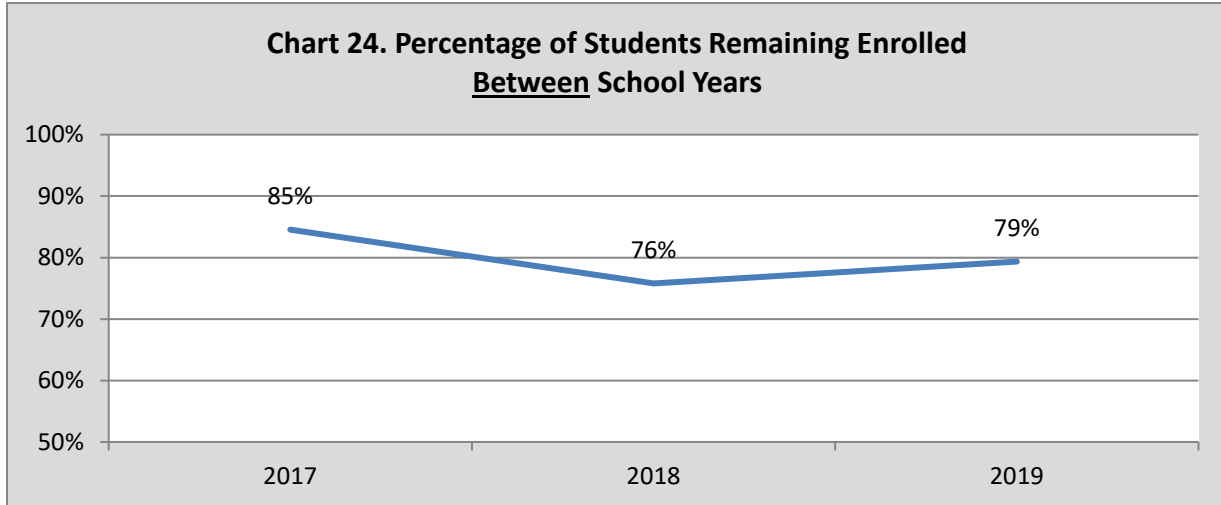
In its Performance Framework, the PEC established student retention expectations. For this school, the PEC established a target of 85% recurrent enrollment between years.

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.

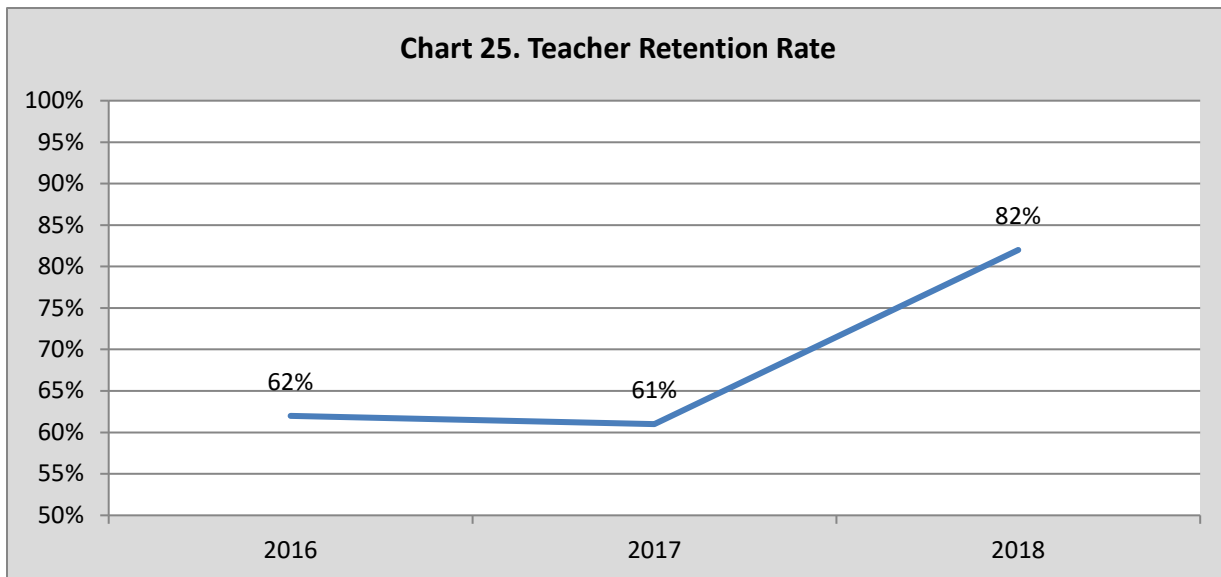


Source: STARS → District and Location Reports → Options for Parents → Charter School Enrollment Report

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 2015-2016 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. Audit

Figure 3. Fiscal compliance over term of contract.

Audit Year	# of Findings	# of Repeat Findings	# of Material Weaknesses and Significant Deficiencies
FY18	7	3	4
FY17	4	3	1
FY16	6	0	1

Summary of Most Recent Fiscal Report

In FY18, the school received the following audit findings:

2018-001 Internal Control over Financial Reporting (Significant Deficiency)

Condition/Context: During our review of financial close and reporting we noted the following issues:

- During our review of contracts, we noted the School recorded a total of \$141,703 to rental services (account #54610) related to the bus service contract. Based on the contract, only \$78,533 was related to rents; the remainder of the contract should have been recorded to other (#55915) services.
- During our review of subsequent disbursements, we noted one item totaling \$27,454.72 was improperly excluded from the accounts payable listing provided by management.

Management's Response: Current year transportation expense accounts are being used correctly. MDS has implemented a two level review process when entering POs and for reviewing accounts.

2018-002 Payroll Contributions (Previously #2016-002) (Significant Deficiency)

Condition/Context: During our review of payroll contributions, we noted the following issues:

- Late fees of \$310 were paid due to inaccurate filings.
- Management was unable to reconcile accrued payroll of \$10,247 during our fieldwork.

Management's Progress for Repeat Findings: Management failed to implement adequate controls to resolve the finding, and will work toward corrective action during FY2019.

Management's Response: The Business Manager is doing a FY17 ERB/payroll reconciliation. A report has been requested from ERB on member contributions to reconcile remittances and submit them correctly by month and employee where necessary.

2018-003 Controls over Cash Disbursements (Previously #2016-002) (Other Noncompliance)

Condition/Context: During our review of disbursements, we noted 5 out of 37 instances in which the purchase order was signed after the date goods/services were received by the school.

Management's Progress for Repeat Findings: Management failed to implement adequate controls to resolve the finding, and will work toward corrective action during FY2019.

Management's Response: Staff has been trained at the beginning in regards to POs processes. The POs must be submitted in a timely request prior to conducting any purchases. Staff will be reminded about this throughout the year during their required trainings. Head Learner will send an email out to staff reminding them of the proper procedures in regards to POs.

2018-004 Controls over Cash Receipts (Previously #2016-004) (Other Noncompliance)

Condition/Context: During our review of cash receipts, we noted 7 out of 12 instances totaling \$71,337 in which a pre-numbered receipt was not used; thus we were unable to determine if the deposit was made within 24 hours of receipt.

Management's Progress for Repeat Findings: Management failed to implement adequate controls to resolve the finding, and will work toward corrective action during FY2019.

Management's Response: Receipts will be in sequential order for accounting purpose. Pre-numbered receipts have been ordered and designated staff who receive funds and make deposits have been trained on the new procedures.

2018-005 Controls over Bank Reconciliation (Material Weakness)

Condition/Context: During our review of the June 2018 bank reconciliation, we noted the following items were listed as outstanding electronic payments as of June 30, 2018.

- IRS outstanding payment of \$14,707.05, cleared bank July 9, 2018.
- NM RCH outstanding payment of \$9,981.25 cleared bank on July 12, 2018.
- NM ERB outstanding payment of \$85,460.71 cleared bank on July 12, 2018.

We noted the electronic payments were not initiated as of June 30, 2018, thus were not valid outstanding items against cash.

Management's Response: Debits and credits for payroll and AP are system-generated entries and usually those entries are not reversed. MDS will make sure that all PR liabilities are processed before or by June 30 and any outstanding liability will be listed and provided to auditors.

2018-006 Controls over Voluntary Deductions (Material Weakness)

Condition/Context: During our review of accrued liabilities, we noted \$33,796 of voluntary contributions payable that consisted largely of 403(b) contributions. Management indicated they were unaware that 403(b) contributions were being withheld from employee paychecks and contributions were not remitted timely to the 403(b) administrator. Management did remit \$25,095 on September 11, 2018 related to the late contributions and has engaged the plan administrators to determine the amount of lost investment earnings due to the late contributions.

Management's Response: During implementation of the new accounting system in FY18, some of the vendor information didn't transfer correctly; therefore various employee deduction vendors were not correct in the new system. We worked throughout the year until this issue has been remediated. Contributions were sent after the fiscal year ended and a calculation on lost income is in process to make accounts whole. Deductions have been corrected for FY19 and contributions have been sent in a timely manner.

2018-007 Controls over Annual Inventory (Other Noncompliance)

Condition/Context: The School did not perform an annual inventory as of June 30, 2018.

Criteria: NMSA 12-6-10 requires an annual inventory of all physical inventory of property and equipment costing more than \$5,000 to be performed.

Management's Response: MDS is working on drafting fixed assets and inventory procedures for staff in charge to follow. MDS will work on implementing the fixed assets module in the accounting system to be accurate and more efficient on accounting for inventory and assets management.

2b. Board of Finance

The school's Board of Finance was not suspended during the term of the current contract.

SECTION 3. CONTRACTUAL, ORGANIZATIONAL, AND GOVERNANCE RESPONSIBILITIES

3a. Educational Program of the School

Educational Program of the School

The number of students is capped at 360 for grades 7 through 12, so that each student is known by both teachers and other students. Monte del Sol believes that all students should develop relationships with adults by attending a small school, and through participation in the Mentorship program.

Learning best takes place in a small school environment where every student is known well. All learning is relational and that interactive, engaged learning is an essential element. The school follows the philosophy of Ted Sizer's Coalition of Essential Schools that the school is a community where every student is well known by the staff and most of the other students. While we emphasize that the school is a community, it is equally important for our student to realize that our world is a large community, and our graduates should know how they fit into that larger circle.

Much of the Monte del Sol mission is subsumed in the concept of Global Literacy. The Wisconsin Department of Public Instruction defines Global Literacy as the "Five C's: **communication** - be able to speak more than one language, **culture** - explore and experience the compassion and the curiosity about another culture, **citizenship** - understand global responsibility, **community** - understand current international issues, and **careers** - become lifelong-learners." The school is working towards assessment of students using these criteria.

Student – Focused Term(s).

In order to graduate from Monte del Sol students must complete two mentorships in the community. They may take mentorships in middle school, and are encouraged to do so, but those will not count towards the high school mentorship requirement. In order to fulfill this requirement, we currently have 1.4 FTE dedicated to the delivery of the Mentorship Program.

The mentorship program is unique because it does not target at-risk youth, nor is it a career-readiness program. Instead, students are matched with a member of the community who has expertise in the student's topic of personal interest in order to foster students' self-knowledge and personal development.

Mentorships are evaluated on several levels. Each mentorship student makes a presentation at the Festival of Learning, which takes place at the end of the school year in a formal, off-campus setting. These presentations are evaluated by a panel of adults using a rubric with six criteria: preparedness, knowledge, organized, passionate, talent, commitment. Mentorship portfolios are evaluated by the mentorship staff using a rubric with seven criteria: grammar and mechanics; professional style and attention to audience; organization and development; engagement with supporting materials; engagement with the learning process; demonstrates passion and commitment; and clear evidence of learning.

School seniors are encouraged to be role models within their immediate world communities. This is encouraged through participation programs such as the following:

- “We Can Change the World Challenge”, which allows students a platform for developing
- environmental sustainability projects
- Student-led diversity workshops
- Recycling education and outreach
- Serving on Honor Council, Community Service, Gay-Straight Alliance and Model UN
- Organizing self-esteem and anti-drug/substance abuse seminars
- Development of Senior Leadership Group to organize and oversee fundraising and school spirit
- Work on Earth Day Committee
- “Think About It” – positive norming collages in the gathering space
- Annual mural committee
- Anonymous acts of kindness

Teacher – Focused Term(s).

The School leadership and staff negotiate shared leadership of the School and commit to implement transparent processes relating to employment at the School.

Parent – Focused Term(s).

Monte parents are requested to donate 10 hours to the school for the year, which may include helping in the garden, volunteering at dances, sporting events, or school fundraisers. We also encourage parents to serve as mentors for other students, to help them to fulfill the students’ two required mentorships. Parents are also encouraged to attend Spanish-speaking family night at school, and the mentorship festival. Parents are encouraged to attend one parent-student conference per quarter

3b. Organizational Performance Framework

Please note that the 2018-2019 ratings are not yet finalized. Schools may be in the process of submitting additional documentation and the Academic Indicator cannot be rated until the NM System of School Support and Accountability data is released. This chart will be updated in the packet provided to the Public Education Commission (PEC) and the school in November.

Monte del Sol	2016-2017	2017-2018	2018-2019
Category I. Academic Performance Framework			
I-A.00 NM A-F School Grading System	Meets (or Exceeds) Standard	Falls Far Below (or Does Not Meet) Standard	Pending
I-A.01 Required Academic Performance Indicators	Falls Far Below (or Does Not Meet) Standard	Falls Far Below (or Does Not Meet) Standard	Falls Far Below (or Does Not Meet) Standard
I-A.02 Optional Supplemental Indicators (school specific items in charter)	Not Applicable	Meets (or Exceeds) Standard	Pending
Category II. Financial Performance Framework			
II-A.00-06 Operating Budget/Audits/Periodic Reports/Expenditures/Reimbursements/Audit Reviews/Meals	Meets (or Exceeds) Standard	Meets (or Exceeds) Standard	Meets (or Exceeds) Standard
Category III. Organizational Performance Framework			
III-A.00 Educational Plan: material terms of the approved charter application	Meets (or Exceeds) Standard	Meets (or Exceeds) Standard	Meets (or Exceeds) Standard
III-A.01 Education Plan: applicable education requirements	Working to Meet Standard	Meets (or Exceeds) Standard	Working to Meet Standard
III-A.02 Education Plan: protecting the rights of all students	Meets (or Exceeds) Standard	Working to Meet Standard	Meets (or Exceeds) Standard
III-A.03 Educational Plan: protecting the rights of students with special needs (IDEA, 504, gifted)	Falls Far Below (or Does Not Meet) Standard	Working to Meet Standard	Working to Meet Standard
III-A.04 Educational Plan: protecting the rights of English Language Learners (Title III)	Falls Far Below (or Does Not Meet) Standard	Falls Far Below (or Does Not Meet) Standard	Working to Meet Standard
III-A.05 Educational Plan: complying with the compulsory attendance laws	Working to Meet Standard	Falls Far Below (or Does Not Meet) Standard	Meets (or Exceeds) Standard
III-A.06 Educational Plan: meet their recurrent enrollment goals	Meets (or Exceeds) Standard	Working to Meet Standard	Working to Meet Standard
IV-A.00 Business Management & Oversight: meeting financial reporting and compliance requirements	Falls Far Below (or Does Not Meet) Standard	Falls Far Below (or Does Not Meet) Standard	Working to Meet Standard
IV-A.01 Business Management & Oversight: following generally accepted accounting principles	Falls Far Below (or Does Not Meet) Standard	Falls Far Below (or Does Not Meet) Standard	Falls Far Below (or Does Not Meet) Standard
V-A.00 Governance and Reporting: complying with governance requirements	Meets (or Exceeds) Standard	Meets (or Exceeds) Standard	Working to Meet Standard
V-A.01 Governance and Reporting: holding management accountable	Meets (or Exceeds) Standard	Meets (or Exceeds) Standard	Meets (or Exceeds) Standard
VI-A.00 Employees: meeting teacher and other staff credentialing requirements	Falls Far Below (or Does Not Meet) Standard	Meets (or Exceeds) Standard	Working to Meet Standard
VI-A.01 Employees: respecting employee rights	Meets (or Exceeds) Standard	Falls Far Below (or Does Not Meet) Standard	Meets (or Exceeds) Standard
VI-A.02 Employees: completing required background checks	Meets (or Exceeds) Standard	Falls Far Below (or Does Not Meet) Standard	Falls Far Below (or Does Not Meet) Standard
VI-A.03 4d. General Info: Staff Turnover, if applicable			
VII-A.00 School Environment: complying with facilities requirements	Meets (or Exceeds) Standard	Working to Meet Standard	Working to Meet Standard
VII-A.01 School Environment: complying with health and safety requirements	Meets (or Exceeds) Standard	Falls Far Below (or Does Not Meet) Standard	Working to Meet Standard
VII-A.02 School Environment: handling information appropriately	Meets (or Exceeds) Standard	Meets (or Exceeds) Standard	Meets (or Exceeds) Standard
Category: Organizational Performance Framework			
School Specific Terms: data on any terms specified in the school's Performance Framework	Not Applicable	Not Applicable	Not Applicable

3c. Governing Body Performance

The school has seven (7) 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.

Name	Role	Service Start Date	Membership Status	FY19 Training Requirements*	Hours Completed	Hours Missing
Charles McIntyre	Secretary		Active	8	8	0
Louise Yakey		5/1/2017	Active	8	0	8
Michael Smith	President	5/20/2014	Active	8	8	0
Robert Jenkins	Vice President	1/1/2017	Active	8	8	0
Steve Alarid			Resigned	8	6	2
Joe Butler		11/20/2018	Active	10	10	0
Mara Bruton		6/18/2019	Active	10	10	0
Korina Lopez		5/1/2016	Active	8	0	8

Figure 7. Current governing council members.

*Training requirements reduced by any approved exemptions.

Steve Alarid resigned in June 2019 and should have completed all required training, therefore his training hours were not allowed to be pro-rated.

OTHER SECTIONS

Part B: Progress Report (to be provided by school)

This section will be completed by school and submitted as part of the renewal application and is an opportunity to provide information on academic performance, financial compliance, and organizational, contractual and governance responsibilities and improvement actions over the term of their most current charter.

Part C: Financial Statement (to be provided by school)

This section will be completed by school and submitted as part of the renewal and is an opportunity to demonstrate the financial stewardship it has implemented over the term of the contract. The school must provide a financial statement that discloses the costs of administration, instruction and other spending categories for the charter school. The financial statement must be understandable to the general public and must allow comparison of costs to other schools or comparable organizations. For schools that have earned a D or lower letter grade, the report should specifically address how the school has prioritized 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. The department has created a form for the report that is incorporated as part of the application

Part D: Petitions of Support (to be provided by school)

This section will be completed by school and submitted as part of the renewal application and is an opportunity to demonstrate the community support for the continuation of the school. NMSA 1978 § 22-8B-12 requires the school provide two petitions (1) a petition in support of the charter school renewing its charter status signed by not less than sixty-five percent of the employees in the charter school during the year prior to the least year of the contract; and (2) a petition in support of the charter school renewing its charter status signed by at least seventy-five percent of the households whose children are enrolled in the charter school on the 120th day of the year prior to the least year of the contract. These petitions must be completed in the school year in which the applicant is applying for renewal.

Part E: Description of Charter School Facilities and Assurances (to be provided by school)

This section will be completed by school and submitted as part of the renewal application and is an opportunity to provide a description of the charter school facilities and assurances that the facilities are in compliance with the requirements of NMSA 1978 § 22-8B-4.2. The school must provide supporting documentation to demonstrate the assurances are correct in an appendix. The required documentation includes the E-Occupancy Certificate, a letter regarding the New Mexico Condition Index (NMCI) from Public School Facilities Authority (PSFA), and a copy of any lease documents. All schools must provide a response for this section of the application.

Part F: Amendments and Amendment Requests during the contract term
The historical information on amendments and amendment requests is provided by the Charter Schools Division in Figure 8.

Description	PEC Action	PEC Approval Date	Reason for denial
Amendment request to increase enrollment cap to 380.	Deny	4/7/2017	"the school has not yet demonstrated sustained academic achievement, as required by NMSA 1978, S. 22-2E-4E, which requires a school that has earned a letter grade of "D" to prioritize resources toward proven programs and methods linked to improve student achievement until the school earns a grade of "C" or better for two consecutive years."
Amendment request to amend the food service terms of its contract with the condition that the school provide the approved governing body minutes to the CSD.	Approve	1/13/2017	NA

Figure 8. Amendment Requests and actions.