



**EXECUTIVE COMMITTEE
MEETING**

Tuesday, March 19, 2024

CES 10601 Research Rd SE

Albuquerque, NM 87123

2:00 p.m.- 5:00 p.m.

- A. Call to Order
- B. Roll Call
- C. Approval of Agenda*
- D. Approval of Minutes – January 31, 2024*
- E. Agency Communications
 - a. Partnerships – Elisa Begueria
 - i. NMCCS – Erik Bose
 - ii. NMCEL – Stan Rounds
 - iii. NMPED – Dr. Candice Castillo
 - iv. NMSBA – Joe Guillen
 - v. Higher Education (4yr) – Dr. Sandra Rodriguez
 - vi. Higher Education (2yr) – Dr. Charley Carroll
 - b. Finance – Elisa Begueria
 - c. Scholarship – Tana Daugherty
 - d. Policy – Brian Snider
- F. Program Overview/Reports
 - a. Six Year Study Update
- G. Administrative Reports
 - a. Directors
 - i. Finance- Robin Strauser*
 - ii. Ancillary- Lianne Pierce*
 - iii. Procurement- Gustavo Rossell*
 - iv. Northern Services/REAP- Paul Benoit*
 - v. Technology- Brad Schroeder*
 - vi. Southern Services- Jim Barentine*
 - vii. Human Resources- Yvonne Tabet*
 - b. Executive Director – David Chavez*
 - i. Request a 4% compensation increase for CES core and Ancillary staff.
 - ii. Request that we provide a 4% incentive bonus to all CES core staff for the 2023-2024

fiscal year.

- iii. Request the purchase of two vehicles.
- iv. Fund the Six Year Study at \$740,000.00 for fiscal year 2024-2025
- v. Fund SITE, Leadership and TAP at levels to be determined by May of 2024
- vi. Approve contract with AAIS for Mathematics Initiative.
- vii. Executive Director's Evaluation (Executive Session)

H. Personnel – Report

- a. Staff Contracts and Resignations*

I. Consent Agenda

- a. Approval of Checks*
- b. Profit/Loss and Balance Sheets*
- c. RFB & RFP Awards

J. Setting Next Meeting Dates

- a. March 19th at 2:00pm, in conjunction with the Spring Budget Conference
- b. May 30th at 2:00pm, in conjunction with the NMSBA School Law Conference
- c. July 16th at 3:00pm, in conjunction with NMCEL

K. Adjournment

All items on agenda are subject to action by CES Executive Committee

*Included in Advance Packet Mailing

**Cooperative Educational Services
EXECUTIVE COMMITTEE MEETING
March 19, 2024**

**Robin Strauser, Chief Financial Officer
Administrative and Finance Report**

Finance:

As of February 29, 2024, CES had total revenue of \$211,571,729 and SSC had total revenue of \$219,738. Total combined revenue was \$211,791,467, compared to total revenue of \$192,804,701 for February 2023. This is a 9.8% increase, or \$18,986,766 more revenue this year compared to last year.

Also as of February 29, 2024, CES had profit of \$1,334,484 and SSC had a profit of \$63,124 for a total combined profit of \$1,397,608. Compared to total profit as of February 2023 of \$1,527,203, profit decreased by \$129,595. The reason for the drop in profitability even though CES' revenue increased this year is because of a couple additional staff added and CES' funding of the 6 Year Study.

As of February 29, 2024, CES had a Fund Balance of \$14,460,995 compared to February 2023 Fund Balance of \$12,204,181. This is an increase of \$2,256,814; an 18.5% increase.

One of the metrics that is tracked is purchase orders. Through February 2024, the dollar amount of purchase orders approved by CES staff was \$357.6 million, an increase of \$85.1 million over the same period last fiscal year. This equates to a 31% increase in the dollar amount of total purchase orders approved. Direct purchase orders approved were \$142.5 million, an increase of \$37.0 million over the previous year. Traditional purchase orders, including Gordian and RS Means, were \$215.1 million, an increase of \$48.0 million over the previous year.

EANS (Emergency Assistance to Non-Public Schools):

This program ended on June 30, 2023. CES staff continue to provide PED support with required reporting of expenditure data as requested by PED.

ARP EANS (American Rescue Plan EANS):

This program will end on June 30, 2024. CES continues to administer this program for the PED. The contacts for this program are Kirsi Lane, Director, and Daniela Romero, Deputy Director, from the Student, School, and Family Support Bureau.

Audit:

Fiscal year-end is quickly approaching. The State Audit Rule requires that the auditor rotates every four years. As such, CES will be requesting the Jaramillo Accounting Group do CES' 2023-2024 year end audit. This will be their fourth year of auditing CES. A new auditor will need to be engaged for Fiscal year 2024-2025.

SSC:

Suite 200 and Suite 300 have been vacant and available for lease. CES entered into a tentative lease agreement for Suite 300. The lease agreement must be submitted to the State Board of Finance for their approval before CES can complete the lease agreement.

Suite 200 is currently being considered by another organization, but CES has not yet received a Letter of Intent for this suite.

Staff:

We had one Purchasing Specialist resign effective January 9, 2024. The Business Department was very fortunate in its recruitment efforts, and we were able to fill this vacancy with a new Purchasing Specialist starting January 22, 2024. Ms. Julienna DeVizio was hired. Ms. DeVizio was referred by another Purchasing Specialist.

Strategic Plan:

The Strategic Plan for 23-24 has been updated. Opportunities for additional enhancements to systems and processes are ongoing.

**Cooperative Educational Services
EXECUTIVE COMMITTEE MEETING
March 19, 2024**

**Lianne Pierce, Ancillary Director
Ancillary Report**

2023-24

Strategic Goal (1)

Action Plan 1.

Increase percentage of Ancillary requests filled through enhanced recruitment and retention strategies.

<u>Role Group</u>	<u>Jul</u> <u>23</u>	<u>Aug23</u>	<u>Sept 23</u>	<u>Oct 23</u>	<u>Nov23</u>	<u>Dec 23</u>	<u>Jan 24</u>	<u>Feb 24</u>	<u>Mar 24</u>	<u>Apr 24</u>	<u>May 24</u>	<u>Jun 24</u>
Anc Tcher	3	3	3	3	4	4	4	6	6			
APE /RT	1	1	1	1	1	1	1	1	1			
ASL-I	0	0	0	0	0	0	0	0	0			
AUD	1	1	1	1	1	1	1	1	1			
BMS	2	3	2	2	1	1	1	1	1			
COMS	0	1	1	1	1	1	1	1	1			
COMS/TVI	1	1	1	1	1	1	1	1	1			
TVI	1	1	2	2	1	1	1	1	1			
COTA	8	8	8	8	8	8	8	8	8			
DIAG	48	53	53	5	53	54	55	56	56			
LPN	0	0	1	1	1	1	1	1	1			
NP	0	0	0	0	0	0	0	0	0			
OT	24	24	24	2	24	24	24	24	24			
PhD Psych	6	5	5	4	4	4	4	4	4			
Sch Psych	18	18	18	1	18	18	18	18	18			
PT	5	5	5	5	5	5	5	5	5			
PTD	2	2	2	2	2	2	2	2	2			
RHC	6	6	7	7	7	7	7	7	7			
RN	8	9	9	9	9	9	9	9	9			
RT	7	7	7	7	7	7	7	7	7			
SLP	33	35	34	34	34	34	34	33	33			
SLPA	0	0	0	0	0	0	0	0	0			
SW	34	36	36	3	37	38	40	41	41			
SW Reg Ed	4	4	4	4	5	5	5	5	5			
Staff Count	212	223	232	232	232	228	230	232	232			
Resigned - Retired	0	1	0	1	1	4	0	1	0			
Interviewed	3	15	0	4	1	7	2	3	0			
Recommending: New Hires or Returning	2	9	0	1	1	6	2	3	0			

Action Plan 1:

Recruitment:

Interviewed – 5, 4 of the 5 recommended to hire, the other will come on board for 24-25 SY.

Resign/Retire – 1 total for the 3rd Quarter, medical leave turned into resignation.

Staff count: 232, up from 228

Total Allocations requested in the 3rd Quarter: 510, up from 482.

Total Allocations assigned to staff: 451 up from 416.

Remaining Vacancy requests: as of this date, 56 vacancy requests.

Explore additional IT uses to support Ancillary Dept. responsibilities.

- After successful training with NCCE, we are using Microsoft Dynamics 365 more and finding uses for our department.
- Looking forward to more Dynamics 365 training.

Strategic Goal (2)

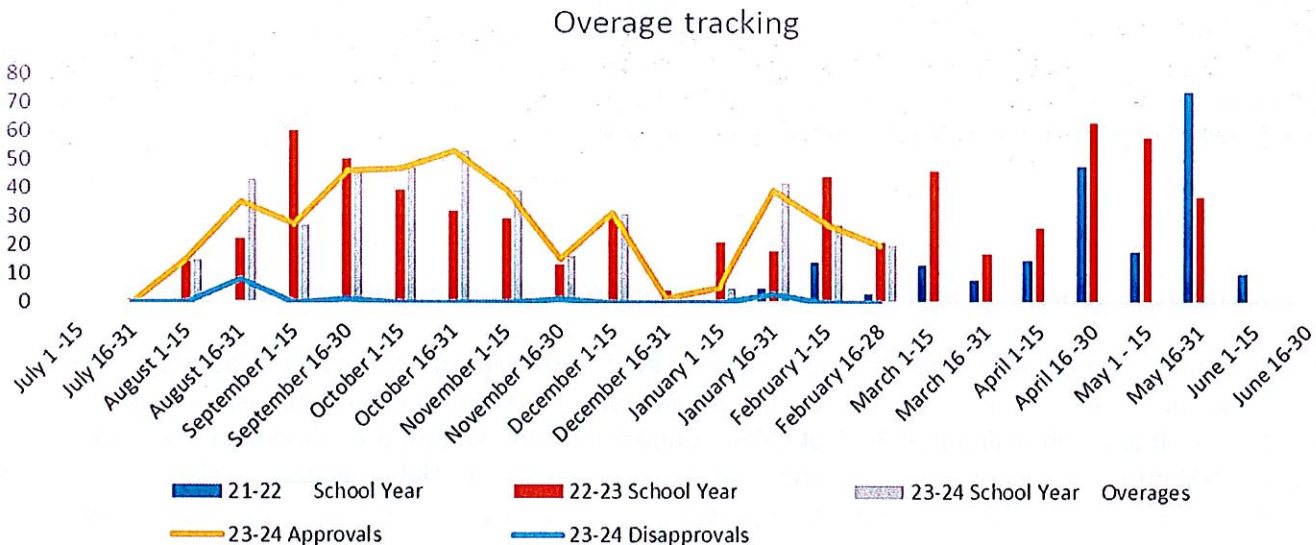
Expand PD opportunities for staff.

- CPI has taken place in the 3rd Quarter with 35 participants.
- CES is looking at professional development to include Excel for staff which is Ancillary's primary request regarding PD for Software platforms.

Staff Development: Promote Tuition Reimbursement.

- Still having discussions as to what would be beneficial.

An "overage" is when a staff member exceeds the allocation of hours assigned to them according to the agreement between CES and the institution. Updated for 2nd Quarter 2023/24. These figures are based on 232 staff in any given pay period. The spikes are moderately correlated with the PED Special Education Count Days (the two weeks prior for reevaluation due dates.)



The lines and gray bars are for 2023-2024,
The other vertical bars are from previous years.

Other:

Worked with APS to remove two redundant forms CES staff were required to fill out. All the information they needed is on the Time Sheet Audit report which they were more than happy to receive.

Executive Committee Meeting in Santa Fe

Image Silo refresher training

Microsoft Dynamic 365 introduction training
 Worked on collecting AR for multiple institutions over 60 days overdue for Invoice payment.
 Worked on Gifted Testing Matrix based on the new G-TAM.
 Consulted with 2 Diagnosticians for future guidance for gifted evaluations. One had a very good write-up, submitted to Chris Vian, the Gifted Coordinator at PED, and he approved. We distributed this to our Diagnostician staff.
 Secured UNM Affiliation Agreement for OT and PT clinical filed work with our OTs and PTs for 24-25 School Year.
 Worked on End of Year Ancillary Staff meeting planning.
 Responded to IPRA request.

**Cooperative Educational Services
 EXECUTIVE COMMITTEE MEETING
 March 19, 2024**

Procurement Department Administrative Report – Gustavo Rossell

The CES Procurement Department continues with its mission to issue the solicitations and resulting contract vehicles for our members' use saving them time and hundreds of thousands of dollars annually.

Procurement News

Job Order Contracting Trainings (RS Means JOC Core)

The first JOC Training of the calendar year was on Tuesday, February 13, 2024, 10:00 am., virtually and in person.

Training	Registered	Attended Virtually	Attended in Person
Members	142	95 (67%)	4 (3%)
Contractors	62	47 (76%)	5 (8%)

Other Trainings

New Contract Award Orientations for AEPA and CES contract-holders.

Editorial

State of Cooperative Procurement in NM - Challenges Ahead for CES Procurement

CES Member Districts and agencies are electing to spend NM dollars utilizing contract-vehicles from procurement organizations that are not CES, not from NM, or that traditionally, have not been a purchasing cooperative or a competitor of CES. It is worth noting that 80% of CES' contract-holding vendors are NM-based, CES reinvests its profits back into NM public education – no other cooperative reinvest back into NM education, or NM, anywhere near at the level that CES does -, CES gives purchasing credits back, directly proportional to their spend, to all CES contract-using members.

The usage of CES contracts by its members have been under increasing external pressures from:

- 1) NM Agencies - State (State of NM Purchasing Dept.), higher education consortia (CHESS), and local agencies (UNM, RECs) that are now comporting like purchasing cooperatives by assessing an administrative fee to users of their contracts in addition to, those purchasing departments, receiving an annual budget from the State of NM for their operations.

- 2) This is in addition to the traditional ever-growing presence of massive national competing Group Purchasing Organizations (GPOs) such as OMNIA, Sourcewell, that have lots of marketing dollars and now have boots on the ground in NM and are, in some cases, forming commercial relations with our strategic partners and members, and we also have regional GPOs such as TIPS, BuyBoard, Allied (El Paso Reg. 19), etc., competing for NM public procurement business. CES members spend millions of dollars (through these GPOs) when in most cases, CES has a contract for what they are procuring from those GPOs.
- 3) Amazon Business – the proliferation of their punchout service continues to grow amongst CES members. UNM, NMSU, RRPS, LLPS, LCPS, and others spend outside the state millions of NM dollars annually just through Amazon Business. Compliance is an issue as pricing increases are “dynamic” and directly related to supply & demand, pricing compliance cannot be provided to the user. It’s been found that staff with purchasing authority are keener to buy using Amazon Business and pay non-verifiable prices when there are negotiated contracts available for their use. “It is more fun”, “It gives the feel of shopping at home”, users at UNM said in 2016. One thing is for certain, there is no stopping that trend.

We need the Executive Committee’s help reminding their finance and procurement staff to check CES first before determining to send NM dollars out of the state. In most cases, CES has a contract for most of our members’ needs.

I Update on Recent Publicly Solicited and Competed Solicitations and Contract Awards

RFPs that have been advertised, are closing, or that have been scheduled for evaluations or to be awarded:

Recent Solicitations Awarded:

RFP #	RFP Description
2024-15	<i>School, Activity Buses, and Bookmobiles</i>
2024-16 new category	<i>Public Safety – Products, Services, and Related</i>
2024-17 new category	<i>Utilities – Products, Services, and Related</i>
Key Dates:	Release: 1/12/24; Close: 2/9/24; Award: late Feb. 2024

II Upcoming Publicly Solicited and Competed Solicitations

RFP #	RFP Description
2024-18	<i>Specialty Cleaning and Related Services for Janitorial, HVAC/Duct, Fire/Water/Other Disaster</i>
2024-19	<i>Interactive Classroom Technology</i>
2024-20	<i>Public Sector Administrative Software</i>

2024-21	<i>MRO Building Materials, Supplies, Tools, Equipment and Related</i>
2024-22	<i>Facility Evaluation and Consulting Services – Capital Outlay, Infrastructure, Capital Improvement Planning</i>
2024-23	<i>Vehicles – Car, SUV, Van, Trucks, Police Car and Related</i>
2024-24	<i>Medium & Heavy-Duty Trucks</i>
2024-25	<i>Truck Bodies</i>
2024-26	<i>Trailers</i>
Key Dates:	Release: 3/15/2024; Close: 4/15/2024; Award: End of April, 2024

CES' RFPs and entire procurement process are done, from cradle-to-grave, 100% digitally, helping to reduce our carbon footprint.

**Cooperative Educational Services
EXECUTIVE COMMITTEE MEETING
March 19, 2024
Paul M. Benoit, Northern Services Manager**

Northern Services Travel Notes

Travel continues to be primarily around delivery of member service credits. I was able to get all the "large amount" (over 2K) certificates delivered around region 4 by late February. I emailed the remaining certificates with a thank you and a brief set of instructions on applying the credit to current/pending invoices or purchases that will be made and invoiced PRIOR TO June of 2024. The Winter ASBO conference was in February and was well attended by many. The CES booth had good traffic and the NMASBO "gimic" to get attendees to the booths was enjoyable. It was a virtual "goose chase", if you will and those who participated seemed to enjoy it.

Direct Purchase/Digital Bluebook and DP Account Status

Jim and I continue to assist members with creation of accounts, access to and use of accounts, and training, as needed/requested. We also spend a fair amount of time chasing down members to help unlocking FEIN's in order to get wage decisions. A session on Workforce Solutions was presented last year with our overview of CES for members, but it might be time to do this again (???)

NMREAP NOTES

We remain just shy of 100 subscriptions. Renewal notices will be going out for the 2024-25 school year over the next few weeks.

MEMBERSHIP DIRECTORY

Recently made some tweaks to the Northern piece of the directory to make the email column of the export more user friendly. I had multiple emails in the email box/column with semi-colon delimiters. I moved the extra emails to the "notes" section.

Other

I have updated monthly reports in the strategic plan for 2023-24. The goals/actions for Northern Services remain the same, related to Member Services and Support and Marketing of CES, Training and Maintenance for Digital Bluebook Accounts, Membership Directory for all institutions (Members and PE's), and NMREAP support. These goals are attached.

STRATEGIC PLAN OUTLINE FOR NORTHERN SERVICES (2023-24)

Below is the basic outline of Northern Services Goals and Strategies in the Strategic Plan – Action Plan. My report (above) stands and is reflective of efforts to address these action goals and strategies at this time. The new strategic plan was also finalized in this time. The first Quarter/90-Day Plan Report has been posted for Northern Services.

1. Provide, enhance, customize personal approach to Member Services Regions 1, 2, 3, 4N, and 5.
 - a. Make regular site visits to each region, at least quarterly, and call on each member/PE 1-2 times per year.
 - b. Regular mass notifications related to DP Accounts, Bluebook Access. Contact lists (Annual updates)
 - c. Continue providing in-person and on-line Digital Bluebook training, working with Jim when appropriate, especially when process changes occur.
 - d. Provide monthly analysis of DP and Traditional Purchasing for Jim and Paul's use in the field, working with active members/PE's and to increase promotion of CES with all Members/PE's.
2. Provide support to departments and promote service programs (ALD, LEAP, TAP, Site)
 - a. Follow up on all requests from Business Office for Member Services related to purchasing contracts.
 - b. Follow up on all requests from the Procurement Office related to Vendor services.
 - c. Assist in mass mail-outs to key contacts for TAP, SITE, LEAP, Contracts, Ancillary, etc....
 - d. Maintain Directory and an updated Superintendent list for emergency contacts.
3. Promote subscriptions. Training viability and enhancements.
 - a. Provide continued support to all subscribers for access to and use of NMREAP for job posting and applicant searches.
 - b. Maintain database of subscriptions, including renewal status, PO status, Invoicing status, and payment status. Work with Purchasing Specialist assigned to processing POs for invoicing.
 - c. Continue marketing NMREAP subscription services with all districts and charters.
 - d. Ensure the NMPED continues to distribute NMREAP information with all licensure applications.

**Cooperative Educational Services
EXECUTIVE COMMITTEE MEETING
March 19, 2024**

Technology Department Administrative Report – Brad Schroeder

Work continues with our software contractor on several upgrades to our eProcurement application and a rewrite of the software. We need to determine a tiered pricing model for all modules and market to districts, cities, counties and other state purchasing cooperatives throughout the country. Low costs, flexibility, and centrally hosted support will be key factors. Quick wins will include marketing to local entities and also offer Procurement-as-a-Service to validate proof of concept/MVP (minimum viable product), make adjustments and release major/minor updates to customers.

We are looking at other solutions (specifically Integrity Data) regarding the processing of HR, Payroll, PTO, Expense Reports, Timesheets, etc.. Goal is now to have it ready for testing for internal staff by early May with a full rollout soon after in June. We are reevaluating our Payroll process to determine next steps as our payroll system will no longer be supported in 2028.

Items on the immediate horizon include the cross-organization implementation of CRM (Customer Relationship Management) either with our proprietary software eProcurement (new name) or Dynamics 365 as well as Microsoft Copilot (Chat GPT/AI) along with a full technology training curriculum for all staff.

Please welcome aboard Mathew Bayhan, our new IT Specialist :)

**Cooperative Educational Services
EXECUTIVE COMMITTEE MEETING
March 19, 2024**

Administrative Report –Jim Barentine, Southern Services Manager

With the advent of Member Service Credits for Participating Entities, a whole new level of excitement was created among the PEs. Many who had participated with CES procurement skeptically discovered, and showed, an enthusiasm for CES that was missing in the past. It was a privilege to deliver these MSCs and to build upon that enthusiasm during those visits. Some of the same opportunities presented themselves when delivering MSCs to Members who had not already received them at CES' regional meetings.

The added Southern focus of site visits has been upon Region 6 since the last Executive Committee Meeting. I have explored with members ideas around improved efficiency in procurement, staff training, and vendor recruitment and use, to name the most prevalent activities. Lots of members have had questions related to finding sources for goods or services, and many have been anxious to make use of some first-time CES contract categories.

Production and shipment delays of products plus difficulty remaining fully staffed, possible side-effects of the Covid-19 Pandemic, remain frustrations for our members, although there seems to be a slight improvement in the production and shipment arena.

Some of my effort goes toward recruitment of Procurement Partner vendors, trying to entice interest in them competing for a CES contract, all to the mutual benefit of themselves and our members. On February 27, I worked a booth at the NM APEX expo (formerly called PTAC), where I worked to inform vendors of the possibilities with CES. It was a small but remarkably busy show. Robin and I will work a booth at the El Paso Cooperative Purchasing Expo on April 3, where their Convention Center ballrooms will be **filled** with potential CES PEs and both potential and existing CES Procurement Partners.

Media and Social Media work continues successfully. We produced a "What's Included in the Bluebook?" video to help with training members. Video clips to support and explain TAP, Leadership, LEAP, and SITE are being continually posted to social media and receiving good traction. The number of followers on all our social media platforms continues to grow. We have moved publication of the Vendor Newsletter to mid-month following the end of each calendar quarter, hoping to be less confusing internally about content expectations.

The continually revised series of "Jim's Watch List" of legislation was well-received. For the thirty-day session, five versions were distributed.

Marketing and collaboration efforts have continued, occurring as a combination of in-person, virtual, and hybrid. Meetings and conferences include:

- NMSBA Board Institute (Santa Fe)
- NMASBO Winter Conference (Albuquerque)
- NM APEX Government Contracting Business Expo (Las Cruces)
- Various meetings with contracted and potential vendors
- Various meetings/trainings with members and potential members

**Cooperative Educational Services
EXECUTIVE COMMITTEE MEETING
March 19, 2024
Human Resources Report - Yvonne Tabet**

The Human Resources Department has focused this quarter on updating the CES (Cooperative Educational Services) Administrative Regulations based on policy updates from the fall review. The regulations serve as the Employee Handbook and had not been revised since 2021. A committee was created consisting of Leadership Team members each assigned different sections to review, update and revise the 10 sections. After this process was completed, committee members convened to review and discuss changes and revisions. A training schedule was developed for the entire Office Staff to take part in monthly Huddle meetings, starting in January. The HR (Human Resources) Director has created the fun and engaging training model.

As of January, NMPSIA (New Mexico Public School Insurance Authority) has changed the process in which new employees enroll in medical benefits. In the past, NMPSIA Enrollment forms, which were completed by the employee, were uploaded into the NMPSIA portal. Those forms are no longer being processed in that manner. The benefits are now keyed into the portal by the benefits specialist. NMPSIA, is moving to a more employee self-service type portal for all employees. Which could mean more employee responsibility to enroll, manage and change their options. A process has been developed at CES that meets the requirements for NMPSIA.

The week of March 11 will be the launch of the Employee Engagement Q12 Survey to the core Office Staff. This survey data will be included in previous customer service survey data to guide Leadership in enhancing our practices at CES.

Nine new hires for this quarter, down from Twenty-three last quarter. Three NMPSIA New Enrollments for medical and Standard Life benefits. The new Office staff have experienced improved onboarding with the different CES departments to have a deeper understanding of CES' mission and how they contribute.

Below are the most recent employees to join CES in the various categories from January 17-March 6, 2024:

Office Staff

Name	Position
Lisa Romo	Procurement & Contract Specialist
Juliena DeVizio	Purchasing Specialist
Mathew Bayhan	IT Specialist

Ancillary Staff

Name	Position
Colleen Wolf	Occupational Therapist

Professional Services

Name	Position
Daniel Barto	Professional Services
Adam Rios	Professional Services

EANS

Name	Position
Jeremy Farmer	EANS
Nichole Van Slooten	EANS
Brian Dodson	EANS

**Cooperative Educational Services
EXECUTIVE COMMITTEE MEETING
Tuesday, March 19, 2024**

**Executive Director's Report – David Chavez
Action Items**

Item (a) Fiscal year 2024-2025 Budget considerations:

Request a four (4%) percent compensation increase for CES Core Office and Ancillary Staff. This increase will require us to budget an additional \$144,182 for salaries, \$11,030.00 for FICA and Medical, increase in retirement will be \$18,109.00 for a total increase of \$173,321.00. Ancillary staff increase will be \$446,458.00 salaries, FICA and Medical \$34,154.00 for a total increase of \$480,612.00 (this cost will be offset by the increase in institutional rates.

Request that we provide a four (4%) incentive bonus for all core office staff for the 2023-2024 fiscal year. (This one-time incentive bonus will cost \$155,212) This request is made on CES current trend of increase revenue over prior, as of February, by 3.4 percent approximately \$17,000,000 over last year. As of February, of this year we show a profit of approximately \$646,000.00.

Item (b) Request that we purchase two vehicles to replace the Taurus and the 2014 Acadia. The CES vehicles are used by the Technical Assistance Program, (TAP) School Improvement Technical Expertise, (SITE), Leadership, and Leading Educators Through Alternative Pathways, (LEAP), professional service staff.

Item (c) Request that we continue to fund the six-year study at current year funding of \$740,000.00 for fiscal year 2024-2025. Fund SITE, Leadership and LEAP at the appropriate levels as determined by May of 2024.

Item (d) Approve the contract with AAIS for the three-year mathematics initiative. We have received a proposal from the Dana Center delineating a comparable scope of work as outlined by AAIS. It is my opinion that the AAIS proposal is more comprehensive and would better serve our districts.

Item (e) Executive Directors evaluation. This is the meeting that is designated by the Executive Committee to evaluate the CES Executive Director. I have provided the Executive Committee chairperson with the evaluation template and my self-assessment.

**Cooperative Educational Services
Executive Committee Meeting
March 19, 2024
Personnel Report-Yvonne Tabet
January 18-March 6, 2024**

Staff Resignations/Terminations/Non-Renewal

- | | |
|------------------|-------------------------------|
| • Janet Sisneros | Office, Purchasing Specialist |
| • Amy Rojas | Ancillary |
| • Jenelle Howard | Professional Services |

New Staff Contracts Received for 2023-2024

- | | |
|-----------------------|--------------------------------|
| • Colleen Wolf | Ancillary |
| • Julienna DeVizio | Office, Purchasing Specialist |
| • Lisa Romo | Office, Procurement & Contract |
| Specialist | |
| • Jeremy Farmer | EANS |
| • Nichole Van Slooten | EANS |

- Brian Dodson
- Daniel Barto
- Adam Rios
- Mathew Bayhan

EANS
Professional Services
Professional Services
Office, IT Specialist

**COOPERATIVE EDUCATIONAL SERVICES
CHECK REGISTER**

January 16, 2024 through March 5, 2024

Check Number	Date	Payee	Amount
240955	1/22/2024	Alb Bernalillo Co Water Utility Author	690.67
240956	1/22/2024	Cengage Learning, Inc.	411.99
240957	1/22/2024	Crisis Prevention Institute	11,559.75
240958	1/22/2024	Conti Energy Control LLC	1,972.32
240959	1/22/2024	ESA Construction Inc	105,454.50
240960	1/22/2024	Greater Albuquerque Chamber of Commerce	371.00
240961	1/22/2024	Gunderson Heating & Cooling	45,916.39
240962	1/22/2024	Hansen & Prezzano/Builders LLC	21,208.50
240963	1/22/2024	IXL Learning, Inc.	626.00
240964	1/22/2024	Lente's Painting, Inc.	5,800.62
240965	1/22/2024	Mesa Verde Enterprises, Inc.	17,637.88
240966	1/22/2024	Mobilease Modular Space Inc	304,430.75
240967	1/22/2024	NetSupport Incorporated	627.12
240968	1/22/2024	Northstar NM LLC	3,004.13
240969	1/22/2024	Rising Sun Technologies	4,938.27
240970	1/22/2024	RSM	1,476.61
240971	1/22/2024	United States Postal Service	359.31
240972	1/22/2024	Van Amberg, Rogers, Yepa & Abeita LLP	3,164.48
240973	1/22/2024	Yearout Mechanical	36,449.90
240974	1/26/2024	Alamogordo Public Schools	25.00
240975	1/26/2024	Alice King Community School	227.34
240976	1/26/2024	AT&T Mobility	1,356.61
240977	1/26/2024	Candice Thompson	50.00
240978	1/26/2024	CenturyLink	1,957.96
240979	1/26/2024	City of Lovington	107.88
240980	1/26/2024	City of Santa Rosa	6,121.65
240981	1/26/2024	City of Bloomfield	5,536.99
240982	1/26/2024	City of Santa Fe	25,992.32
240983	1/26/2024	Crisis Prevention Institute	1,499.50
240984	1/26/2024	VOID	-
240985	1/26/2024	ESA Construction Inc	437,802.21
240986	1/26/2024	Ernest Monfietto	74.88
240987	1/26/2024	Explore Academy	3,409.57
240988	1/26/2024	Federal Express Corp	132.61
240989	1/26/2024	Four Rivers, Inc.	61,465.68
240990	1/26/2024	GM Builders, Inc.	49,394.53
240991	1/26/2024	Greer Stafford/SJCF Architecture Inc	169,664.46
240992	1/26/2024	Industrial Mechanical Inc.	52,156.15
240993	1/26/2024	Jal Schools	90.00
240994	1/26/2024	Karen F. Romero	149.00
240995	1/26/2024	Martin Romine	447.25
240996	1/26/2024	Mesa Vista Consolidated Schools	6,378.95
240997	1/26/2024	Moriarty-Edgewood School District	30.00
240998	1/26/2024	New Mexico Gas Company	533.35
240999	1/26/2024	NCS Pearson Inc.	2,293.21
241000	1/26/2024	Pojoaque Valley School District	23,679.81

Check Number	Date	Payee	Amount
241001	1/26/2024	Poms & Associates Insurance Brokers Inc	640.37
241002	1/26/2024	Quadient Leasing USA, Inc.	82.55
241003	1/26/2024	RSM	916.97
241004	1/26/2024	Santa Fe County	240.01
241005	1/26/2024	Sched LLC	2,130.00
241006	1/26/2024	School of Dreams Academy	1,789.37
241007	1/26/2024	Taos Municipal Schools	750.00
241008	1/26/2024	Tel/Logic Inc	4,818.77
241009	1/26/2024	Truly Nolen	87.18
241010	1/26/2024	Verizon Wireless	731.21
241011	1/26/2024	VOID	-
241012	1/26/2024	Voz Collegiate Preparatory School	90.94
241013	1/26/2024	West Las Vegas Schools	5,478.72
241014	1/26/2024	WPS	1,930.13
241015	1/26/2024	Yearout Mechanical	1,575.39
241016	2/2/2024	Adan Delgado	304.81
241017	2/2/2024	AFLAC	4,004.60
241018	2/2/2024	Allstate Benefits	115.18
241019	2/2/2024	American Fidelity Assurance Co	938.34
241020	2/2/2024	American Alliance for Innovative Systems	122,400.00
241021	2/2/2024	Coyote Cabling	4,423.04
241022	2/2/2024	Discount Custom Glass & Shower Door	1,920.31
241023	2/2/2024	Texas New Mexico Newspaper Partnership, LLC	117.72
241024	2/2/2024	Conti Energy Control LLC	5,981.41
241025	2/2/2024	ESA Construction Inc	145,321.54
241026	2/2/2024	First Financial Administrators, Inc.	6,818.73
241027	2/2/2024	Industrial Mechanical Inc.	11,612.11
241028	2/2/2024	Johanna Bruhn	1,088.90
241029	2/2/2024	Mesa Verde Enterprises, Inc.	51,873.74
241030	2/2/2024	The Playwell Group, Inc.	69,016.70
241031	2/2/2024	Pluma, LLC	59,338.01
241032	2/2/2024	Public Charter Schools of New Mexico	931.50
241033	2/2/2024	Tel/Logic Inc	77,817.25
241034	2/2/2024	Verizon Wireless	1,532.28
241035	2/2/2024	Vigil & Associates Architectural Group PC	11,600.21
241036	2/2/2024	Visions in Planning, Inc.	33,806.52
241037	2/2/2024	Western Mechanical Co, Inc.	176,414.83
241038	2/2/2024	Wizer Electric LLC	212,298.77
241039	2/2/2024	New Image Construction	20,101.77
241040	2/7/2024	NM State University	5,941.87
241041	2/9/2024	Aidant Fire Protection Company	487.83
241042	2/9/2024	Aztec Schools	6,162.86
241043	2/9/2024	Brian Snider	854.64
241044	2/9/2024	Charley Carroll	361.38
241045	2/9/2024	Comfort Systems USA Southwest, Inc.	7,225.00
241046	2/9/2024	David Chavez	980.49
241047	2/9/2024	ESA Construction Inc	66,617.43
241048	2/9/2024	Facility Solutions Group	10,729.96
241049	2/9/2024	Federal Express Corp	62.81
241050	2/9/2024	Daiohs	94.71

Check Number	Date	Payee	Amount
241051	2/9/2024	GoTo Communications	613.34
241052	2/9/2024	Kay-Twelve, LLC	6,944.17
241053	2/9/2024	New Image Construction	1,767.45
241054	2/9/2024	Dry Fly Enterprises, Inc.DBA Nube Group	9,109.38
241055	2/9/2024	PNM	2,017.20
241056	2/9/2024	PRO-ED, Inc.	704.00
241057	2/9/2024	Quadient Leasing USA, Inc.	259.86
241058	2/9/2024	Riverside Insights	2,972.75
241059	2/9/2024	Roswell Daily Record	109.51
241060	2/9/2024	San Diego Riverside	189.80
241061	2/9/2024	Sandia Lightwave, LLC	32,227.22
241062	2/9/2024	The Algebros LLC	500.00
241063	2/9/2024	Victoria's Sunset LLC	2,690.62
241064	2/9/2024	Yearout Mechanical	1,393.05
241065	2/9/2024	Village of Cloudcroft	73,936.36
241066	2/16/2024	Albuquerque Publishing Company	144.00
241067	2/16/2024	Albuquerque Talent Development	682.02
241068	2/16/2024	Control and Equipment Company	194.69
241069	2/16/2024	Coyote Cabling	105,815.85
241070	2/16/2024	Conti Energy Control LLC	20,541.08
241071	2/16/2024	ESA Construction Inc	352,929.37
241072	2/16/2024	Michael Kight	2,500.00
241073	2/16/2024	Rising Sun Technologies	48,858.41
241074	2/16/2024	RSM	1,519.34
241075	2/16/2024	United Way of North Central New Mexico, Inc.	250.00
241076	2/16/2024	Western Mechanical Co, Inc.	279,757.72
241077	2/23/2024	Alb Bernalillo Co Water Utility Author	702.71
241078	2/23/2024	City of Albuquerque	253.13
241079	2/23/2024	Control and Equipment Company	89,123.09
241080	2/23/2024	Coyote Cabling	120,962.96
241081	2/23/2024	Conti Energy Control LLC	1,972.32
241082	2/23/2024	Ernest Monfietto	71.76
241083	2/23/2024	Daiohs	88.00
241084	2/23/2024	Lea County	54,817.91
241085	2/23/2024	Mark Armijo Academy	6,016.93
241086	2/23/2024	McClain + YU Architecture & Design LTD	64,496.47
241087	2/23/2024	MCLL, Inc dba Melloy Chevrolet	42,248.89
241088	2/23/2024	MHS Inc	475.00
241089	2/23/2024	NM State University	642.75
241090	2/23/2024	New Mexico Public Procurement Association	50.00
241091	2/23/2024	Rising Sun Technologies	46,419.76
241092	2/23/2024	RSM	3,645.90
241093	2/23/2024	Sand Digging It Landscapes, Inc.	19,852.50
241094	2/23/2024	The Santa Fe New Mexican	154.49
241095	2/23/2024	Smithco Construction	57,787.48
241096	2/23/2024	Terracon Consultants	1,653.37
241097	2/23/2024	WPS	720.00
241098	2/23/2024	Yearout Mechanical	3,437.02
241099	3/1/2024	AFLAC	4,031.90
241100	3/1/2024	Allstate Benefits	115.18

Check Number	Date	Payee	Amount
241101	3/1/2024	American Fidelity Assurance Co	938.34
241102	3/1/2024	AT&T Mobility	1,899.91
241103	3/1/2024	Carver Electric, LLC	12,462.81
241104	3/1/2024	VOID	-
241105	3/1/2024	Coyote Cabling	31,694.92
241106	3/1/2024	Dry Fly Enterprises, Inc.DBA Nube Group	980.74
241107	3/1/2024	EdRising New Mexico	10,000.00
241108	3/1/2024	Texas New Mexico Newspaper Partnership, LLC	201.31
241109	3/1/2024	Conti Energy Control LLC	16,489.64
241110	3/1/2024	Enviroworks, LLC	1,105,650.44
241111	3/1/2024	ESA Construction Inc	225,774.50
241112	3/1/2024	Daighs	315.85
241113	3/1/2024	First Financial Administrators, Inc.	6,818.73
241114	3/1/2024	Fleming Chemical Company Inc	121.05
241115	3/1/2024	Floor Tech Contracting LLC	13,888.37
241116	3/1/2024	Greer Stafford/SJCF Architecture Inc	9,714.23
241117	3/1/2024	Guitar Center Stores, Inc.	202.50
241118	3/1/2024	Hansen & Prezzano/Builders LLC	94,625.65
241119	3/1/2024	Lorie A Gerkey	2,500.00
241120	3/1/2024	New Mexico Gas Company	452.97
241121	3/1/2024	Physical Science Research Associates Ltd	139,100.00
241122	3/1/2024	PNM	1,895.81
241123	3/1/2024	Psychological Assessment RS	503.40
241124	3/1/2024	Robbins Heating & Air Conditioning, Inc.	3,371.57
241125	3/1/2024	RSM	5,271.67
241126	3/1/2024	Sanchez Demolition, Inc.	24,547.54
241127	3/1/2024	Truly Nolen	87.18
241128	3/1/2024	United States Postal Service	222.89
241129	3/1/2024	United Way of North Central New Mexico, Inc.	250.00
241130	3/1/2024	Verizon Wireless	721.40
241131	3/1/2024	Vigil & Associates Architectural Group PC	16,627.84
241132	3/1/2024	American Alliance for Innovative Systems	61,200.00
241133	3/1/2024	CenturyLink	147.90
241134	3/1/2024	CenturyLink	3,142.03
180			5,817,423.86

Approved this _____ day of _____, 2024

Attest: _____

President, Executive Committee

Cooperative Educational Services
STATEMENT OF NET ASSETS
For the Eight Months Ending Thursday, February 29, 2024

CASH	
Operating BOA	\$17,456,077.78
Operating WF	0.00
Petty Cash	200.00
Endowment Fund	0.00
TOTAL CASH	<u>17,456,277.78</u>
ACCOUNTS RECEIVABLE	28,274,273.26
PREPAID EXPENSES	116,246.77
ACCRUED REVENUE	0.00
OTHER RECEIVABLES	0.00
TOTAL CURRENT ASSETS	<u>45,846,797.81</u>
 EQUIPMENT	
Ancillary	0.00
Accum Dep Anc	0.00
Furnishings	671,006.23
Accum Dep Furn	(563,739.75)
Vehicles	237,846.96
Accum Dep Veh	(146,180.01)
Software	69,786.40
Accum Dep Software	(7,168.52)
NET EQUIPMENT	<u>261,551.31</u>
 PROPERTY	
Land	410,888.64
Building 4216	296,135.47
Building 10601	5,475,285.45
Accum Dep Bldg 4216	(229,870.87)
Accum Dep Bldg 10601	(306,749.03)
Improvements 4216	671,194.70
Accum Dep Imp 4216	(510,069.70)
Improvements 10601	64,774.42
Accum Dep Imp 10601	(94,188.90)
NET PROPERTY	<u>5,777,400.18</u>
TOTAL EQUIPMENT & PROPERTY	<u>6,038,951.49</u>
OTHER ASSETS	
Investment in SSC	0.00
TOTAL OTHER ASSETS	<u>0.00</u>
 TOTAL ASSETS	 <u>\$51,885,749.30</u>

Cooperative Educational Services
STATEMENT OF NET ASSETS
For the Eight Months Ending Thursday, February 29, 2024

ACCOUNTS PAYABLE	31,918,420.36
ACCRUED EXPENSES	
Ancillary Payroll	0.00
Expenses	0.00
Compensated Absences	188,913.13
TOTAL ACCRUED EXPENSES	<u>188,913.13</u>
SUMMER INSURANCE PREMIUMS	55,210.56
PAYROLL TAXES PAYABLE	57,137.10
EMPLOYEE BENEFITS PAYABLE	(2,443.58)
AEPA	0.00
MEMBER CREDIT LIABILITY	372,159.22
DEFERRED REVENUE	3,800.11
Mortgage Payable	4,505,120.95
Mortgage Payable - Current Portion	294,610.84
PPP Loan	0.00
Fiscal Agency Liability - NMPFMA	31,825.29
TOTAL LIABILITIES	<u>37,424,753.98</u>
NET ASSETS	13,126,511.62
CURRENT CHNG in NET ASSETS-PROFIT/(LOSS)	1,334,483.70
TOTAL NET ASSETS	<u>14,460,995.32</u>
TOTAL LIABILITIES & NET ASSETS	<u>\$51,885,749.30</u>

Cooperative Educational Services
STATEMENT of REVENUES, EXPENSES and CHANGES in FUND NET

For the Eight Months Ending Thursday, February 29, 2024

	February	YTD
EXTRAORDINARY REVENUE	\$0.00	\$0.00
A/R-A/P CLEARING ACCOUNT	(189.82)	(2,713.88)
	(189.82)	(2,713.88)
INSURANCE		
Insurance-Revenue	0.00	0.00
Insurance Expense	0.00	0.00
	0.00	0.00
Professional Services		
Professional Services-Revenue	157,931.38	947,723.50
Professional Services-Expense	132,429.08	850,519.29
	25,502.30	97,204.21
PLACEMENT SERVICES		
Placement Services-Revenue	0.00	62,620.00
Placement Services-Expense	470.38	507.31
	(470.38)	62,112.69
MEDICAID		
Medicaid-Revenue	66,381.76	510,915.80
Medicaid-Expense	57,052.00	439,104.21
	9,329.76	71,811.59
FOOD		
Food-Revenue	0.00	40,392.25
Food-Expense	0.00	0.00
	0.00	40,392.25
PROCUREMENT		
Procurement-Revenue	21,168,254.79	186,532,772.98
Procurement-Expense	20,758,449.82	183,190,401.75
	409,804.97	3,342,371.23
AEPA		
AEPA-Revenue	655,743.74	11,842,687.83
AEPA-Expense	575,394.97	11,593,133.49
	80,348.77	249,554.34
ANCILLARY		
Ancillary-Revenue	1,906,026.75	10,015,083.18
Ancillary-Expense	1,753,845.96	9,452,252.44
	152,180.79	562,830.74
INSERVICES		
Inservices-Revenue	0.00	107,825.75
Inservices-Expense	1,791.28	138,726.48
	(1,791.28)	(30,900.73)

Cooperative Educational Services
STATEMENT of REVENUES, EXPENSES and CHANGES in FUND NET

For the Eight Months Ending Thursday, February 29, 2024

	February	YTD
MEETINGS		
Meetings-Revenue	0.00	0.00
Meetings-Expense	945.57	12,942.02
	<u>(945.57)</u>	<u>(12,942.02)</u>
EANS		
EANS-Revenue	1,820.87	200,397.81
EANS-Expense	1,734.16	207,746.35
	86.71	<u>(7,348.54)</u>
ARP EANS		
ARP EANS-Revenue	477,740.35	879,163.18
ARP EANS-Expense	279,833.34	869,782.15
	<u>197,907.01</u>	<u>9,381.03</u>
SITE		
SITE Revenue	0.00	12,374.00
SITE Expense	63,823.40	325,306.99
	<u>(63,823.40)</u>	<u>(312,932.99)</u>
TAP		
TAP- Revenue	44,066.69	241,704.33
TAP - Expense	33,998.68	207,830.41
	<u>10,068.01</u>	<u>33,873.92</u>
ALD		
ALD Revenue	0.00	221,008.21
ALD Expense	68,546.95	405,095.82
	<u>(68,546.95)</u>	<u>(184,087.61)</u>
LEAP		
LEAP Revenue	1,159.00	512,902.18
LEAP Expense	181,122.01	869,880.78
	<u>(179,963.01)</u>	<u>(356,978.60)</u>
TQP		
TQP Revenue	0.00	0.00
TQP Expenses	60,429.88	173,865.00
	<u>(60,429.88)</u>	<u>(173,865.00)</u>
BUSINESS OFFICE		
Business Office-Revenue	0.00	0.00
Business Office-Expense	19,540.01	101,986.78
	<u>(19,540.01)</u>	<u>(101,986.78)</u>
EXECUTIVE DIRECTOR		
Executive Director-Revenue	0.00	0.00
Executive Director-Expense	6,436.51	65,962.57
	<u>(6,436.51)</u>	<u>(65,962.57)</u>

Cooperative Educational Services
STATEMENT of REVENUES, EXPENSES and CHANGES in FUND NET

For the Eight Months Ending Thursday, February 29, 2024

	February	YTD
HUMAN RESOURCES		
Human Resources-Revenue	0.00	0.00
Human Resources-Expense	11,029.34	89,244.72
	<u>(11,029.34)</u>	<u>(89,244.72)</u>
TECHNOLOGY		
Technology-Revenue	0.00	0.00
Technology-Expense	27,979.20	235,308.28
	<u>(27,979.20)</u>	<u>(235,308.28)</u>
ENTITY		
Entity-Revenue	8,625.00	523,718.83
Entity-Expense	380,581.99	2,084,495.41
	<u>(371,956.99)</u>	<u>(1,560,776.58)</u>
PROFIT/(LOSS)	72,125.98	1,334,483.70

Sandia Synergy Center
Financial Summary
2/29/2024

	January	February	Change
Cash - WF Operating - SSC	\$0.00	\$0.00	\$0.00
Cash - Security Deposits WF - SSC	0.00	0.00	0.00
Cash - BOA Operating - SSC	1,394,370.51	1,390,373.73	(3,996.78)
Cash - Security Deposits BOA - SSC	18,525.11	18,525.11	0.00
Accounts Receivable - SSC	(19,155.55)	(7,799.82)	11,355.73
Prepaid Expenses - SSC	0.00	0.00	0.00
Fixed Assets	2,924,333.76	2,872,005.36	(52,328.40)
Total Assets	4,318,073.83	4,273,104.38	(44,969.45)
Accounts Payable - SSC	0.00	3,606.51	3,606.51
Deferred Rent - SSC	0.00	0.00	0.00
Tenant Deposits - SSC	18,286.03	18,286.03	0.00
Total Liabilities	18,286.03	21,892.54	3,606.51
Investment from CES	3,250,804.85	3,250,804.85	0.00
Fund Balance - SSC	937,282.80	937,282.80	0.00
Profit & Loss - SSC	0.00	0.00	0.00
Profit/(Loss)	111,700.15	63,124.19	(48,575.96)
Total Fund Balance	4,299,787.80	4,251,211.84	(48,575.96)
Total Liabilities & Fund Balance	4,318,073.83	4,273,104.38	(44,969.45)
Total Revenue	(195,743.23)	(219,738.30)	(23,995.07)
Total Expense	84,043.08	156,614.11	72,571.03
(Profit)/Loss	(111,700.15)	(63,124.19)	48,575.96
Revenue - Rent - SSC	(125,422.91)	(143,433.07)	(18,010.16)
Revenue - Passthru Maintenance - SSC	0.00	0.00	0.00
Revenue - Passthru Electricity - SSC	(5,941.94)	(5,941.94)	0.00
Revenue - CAM - SSC	(41,894.37)	(47,879.28)	(5,984.91)
Revenue - Interest Tenant Deposits - SSC	(43.56)	(43.56)	0.00
Revenue - Misc - SSC	0.00	0.00	0.00
Revenue - Interest - SSC	0.00	0.00	0.00
Revenue - Investment - SSC	(22,440.45)	(22,440.45)	0.00
Legal Fees - SSC	0.00	0.00	0.00
Accounting/Audit Fees - SSC	0.00	0.00	0.00
Commission Expense - SSC	0.00	0.00	0.00
Indirect Cost - SSC	0.00	0.00	0.00
General Expenses - SSC	79.10	79.10	0.00
Bank Fees - SSC	0.00	0.00	0.00
Depreciation Expense - SSC	0.00	52,328.40	52,328.40
Property Insurance - SSC	6,200.00	6,200.00	0.00
Property Tax - SSC	0.00	0.00	0.00
Janitorial - CAM - SSC	3,767.47	4,305.59	538.12
Janitorial Supplies - CAM - SSC	2,973.11	3,111.88	438.57
Contract Maintenance - CAM - SSC	3,752.61	4,353.97	601.36
Maintenance Supplies - CAM - SSC	0.00	0.00	0.00
Electrical Repairs - CAM - SSC	0.00	0.00	0.00
Plumbing Repairs - CAM - SSC	0.00	0.00	0.00
Door & Lock Repair & Maint - CAM - SSC	0.00	0.00	0.00
Pest Control - CAM - SSC	490.93	490.93	0.00
Safety Equip & Maint - CAM - SSC	441.58	441.58	0.00
Roof Repairs - CAM - SSC	0.00	0.00	0.00
Electricity - CAM - SSC	9,343.23	10,850.87	1,507.64
Gas - CAM - SSC	1,147.97	1,519.90	371.93
Water & Sewer - CAM - SSC	7,237.39	7,258.25	20.86
Solid Waste Removal - CAM - SSC	2,682.25	3,061.40	379.15
Telephone - CAM - SSC	1,007.75	1,007.75	0.00
Security & Alarm Monitoring - CAM - SSC	213.22	213.22	0.00
HVAC Maintenance - CAM - SSC	9,160.29	9,160.29	0.00
HVAC Repairs - CAM - SSC	0.00	1,653.51	1,653.51
Grounds Maintenance - CAM - SSC	5,458.73	6,655.53	1,196.80
Snow Removal - CAM - SSC	1,399.13	1,399.13	0.00
Window Washing - CAM - SSC	247.55	247.55	0.00
Association Fees - CAM - SSC	2,667.68	4,262.44	1,594.76
Management Fees Contract - CAM - SSC	7,535.00	9,687.50	2,152.50
Management Fees Intercompany - CAM - SSC	7,956.00	7,956.00	0.00
Internet CAM - SSC	3,480.00	4,060.00	580.00
Equipment & Storage Rental Fees	0.00	0.00	0.00
Electricity - SSC	0.00	456.86	456.86
Repairs - SSC	0.00	1,764.45	1,764.45
Maintenance - SSC	435.88	435.88	0.00
Repairs & Maintenance General - SSC	424.27	6,908.68	6,484.41
Electricity Passthru - SSC	5,941.94	6,443.65	501.71
Maintenance Passthru - SSC	0.00	0.00	0.00
Janitorial Services SNL - SSC	0.00	0.00	0.00
Renovation Expense Rental Suites - SSC	0.00	0.00	0.00
Fix Me I should be Zero	0.00	0.00	0.00



THE CHARLES A. DANA CENTER

THE UNIVERSITY OF TEXAS AT AUSTIN

3925 West Braker Lane, Suite 3.801 · Austin, Texas 78759 • (512) 471-6190 • FAX (512) 232-1854
www.utdanacenter.org

Proposed Scope of Work New Mexico Cooperative Educational Services

In elementary school, children learn knowledge and skills rapidly. Their experiences in these early years play a critical role in their secondary and postsecondary choices and success. Beyond academic development, the elementary school years form children's attitudes toward learning and school and the habits of mind that support critical thinking, perseverance, and motivation. Elementary educators have an enormous opportunity and responsibility to capitalize on the natural curiosity and imaginations of young children in ways that set them up to be lifelong and capable learners, innovators, and good citizens.

Notwithstanding the immense rewards of shaping the hearts and minds of young learners, elementary educators face great challenges. They grapple with conflicting calls for "back-to-basics" instruction to address real and perceived knowledge gaps and demands for more focus on technology integration and soft skills such as problem solving, critical thinking, student collaboration, and communication. Educators must understand and make wise use of their resources to maximize learning and meet the diverse needs of every student while attending to whole-class culture. Instructional leaders must build family-school relationships, support individual teachers and professional learning communities, and anticipate and plan to overcome context-specific barriers to organizational learning.

The Charles A. Dana Center has nearly 30 years of experience working with K-12 systems to improve mathematics outcomes for students. This scope of work specifies how the Center will support the CES study of 15 districts in enacting their strategic plans and identified K-5 mathematics improvements. This arc of support is a three-year plan that includes network opportunities for cross-institution learning and one-on-one technical support for districts designed to achieve the following goals:

- District- and school-level mathematics leaders, specialists, and coaches will implement effective organizational change strategies to support –
 - Building and sustaining of learning community structures that promote collaborative and ongoing study, planning, and implementation of rigorous academic instruction that meets the needs of all students;
 - Deepening knowledge of the importance of positive school and classroom culture and content-specific social-emotional learning and their profound impact on students' academic behaviors;
 - Facility with tools that support purposeful continuous improvement and collaborative examination of current conditions to improve leadership, instructional support, and K-5 mathematics teaching and learning.
- Mathematics educators will engage in immersive learning experiences, grounded in rapid cycle continuous improvement processes, designed to support –
 - Deepening of mathematical content and pedagogical knowledge, particularly around number sense, its relationship to mathematical strategies, and its importance in the K-5 and beyond trajectory of learning;
 - Application of strategies for implementing productive mathematics discourse and collaborating with peers to address related classroom challenges;

- Changing the culture of learning and proactively shaping students' academic identities and sense of belonging through integration of social-emotional and academic learning;
- Rich engagement with colleagues in learning communities that support ongoing study, planning, and implementation of rigorous instruction for all students.

The Dana Center will make learning design decisions based on district audits and strategic plans prior to beginning work. Center specialists will provide the following services to support the goals listed above, with all activities to be completed by August 31, 2027:

Ongoing Support	Time Commitment
Dana Center specialists will meet regularly with – <ul style="list-style-type: none"> • CES staff to keep them up to date on project progress. • District leadership teams for planning calls and ad hoc technical assistance (email and video calls) in addition to targeted technical assistance specified below. 	4 hours per month
Network Capacity Building	Time Commitment
Dana Center specialists will host monthly virtual community of practice engagements to connect and promote cross-institution learning as follows: <ul style="list-style-type: none"> • K-5 Mathematics Leadership CoP • K-5 Mathematics Teaching CoP 	1 hour per month for leaders 1 hour per month for teachers
In-person Network Convenings	Time Commitment
Dana Center specialists will host annual summer learning convenings for district and school math leaders and teachers. Dates and locations to be determined in collaboration with CES.	2 days per summer
Dana Center specialists will provide two annual network professional learning sessions as follows: <ul style="list-style-type: none"> • Professional learning for district and school mathematics leaders, specialists, and coaches. • Professional learning for mathematics classroom teachers Dates and locations to be determined in collaboration with CES.	2 days per school year <ul style="list-style-type: none"> • 1 day in fall semester • 1 day in spring semester
In-person District Support	Time Commitment
Each district will be assigned a well-prepared, dedicated technical assistance specialist to provide in-person coaching support twice each academic semester to include – <ul style="list-style-type: none"> • District and school leadership briefing and feedback session • School professional learning community support and continuous improvement 	2 visits per school year per district <ul style="list-style-type: none"> • 6 hours each semester per district for leaders • 6 hours each semester per school for teachers
Virtual District Technical Assistance	Time Commitment
Dana Center dedicated technical assistance specialists will meet regularly with – <ul style="list-style-type: none"> • District K-5 mathematics specialists, coaches and/or teacher leaders to provide ongoing capacity building • District K-5 mathematics teachers to engage in reflection and shared problem solving 	1 hour per month for specialists, coaches and teacher leaders 1 hour per month for teachers

Budget

	6/1/24 5/31/25	6/1/25 5/31/26	6/1/26 5/31/27	
Category	Year 1	Year 2	Year 3	Total
Salaries	\$ 119,651	\$ 126,147	\$ 134,977	\$ 380,775
Fringe	\$ 31,678	\$ 34,028	\$ 37,085	\$ 102,791
Subtotal Personnel and Benefits	\$ 151,329	\$ 160,175	\$ 172,062	\$ 483,566
Materials and Supplies	\$ 34,531	\$ 25,700	\$ 26,984	\$ 87,215
Professional Service Providers	\$ 73,164	\$ 64,640	\$ 64,640	\$ 202,444
Travel and Accommodations	\$ 55,384	\$ 58,153	\$ 61,061	\$ 174,598
Total Direct Costs	\$ 314,408	\$ 308,668	\$ 324,747	\$ 947,823
Modified Total Direct Costs (MTDC)	\$ 314,408	\$ 308,668	\$ 324,747	\$ 947,823
Indirect Costs (15%)	\$ 47,161	\$ 46,300	\$ 48,712	\$ 142,173
Total Project Costs	\$ 361,569	\$ 354,968	\$ 373,460	\$ 1,089,997

Responsibilities:

- The Dana Center, CES, and Districts to jointly determine activity dates.

The Dana Center to:

- Provide all workshop and technical assistance materials.
- Coordinate experienced specialists for all in-person and virtual sessions outlined in this scope of work.
- Cover all expenses (training, travel, stipends, etc.) for specialists delivering activities.
- Manage participant registration (if requested).
- Coordinate district and participant communications with CES.

CES to:

- Share information related to district audits and strategic plans to Dana Center project leads.
- Provide venues and any desired food service for in-person network convenings.
- Manage district and participant communications, registrations, and reservations unless Dana Center requested to manage.

Districts to:

- Commit appropriate staff and time to network and district specific support activities.
- Designate a primary contact to coordinate dates and times of activities.

American Alliance for Innovative
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6199478171
dholden@aais.us
www.aais.us

Quote For Proposed Services 1414



ADDRESS

David Chavez
Cooperative Educational
Services
10601 Research Rd. SE
Albuquerque, NM 87198 USA

DATE
01/09/2024

TOTAL
\$378,900.00

DATE	ACTIVITY	# OF DAYS	HOURLY/DAILY RATE	AMOUNT
01/09/2024	THIS IS FOR THE 2024-2025 SCHOOL YEAR.	0	0.00	0.00
01/09/2024	ACTUAL DATES TBD. All dates are placeholders until final dates are agreed upon.	0	0.00	0.00
01/09/2024	This proposal establishes the ceiling and the actual work will not exceed the total amount listed in this proposal. AAIS is committed to finding ways to decrease the cost for our clients.	0	0.00	0.00
01/09/2024	All prices listed in this proposal include travel-related expenses.	0	0.00	0.00
07/29/2024	Strategic planning: data analysis, problem solving, development and revision of tools and processes, and coordination of logistics	8	2,300.00	18,400.00
08/01/2024	LMS creation and maintenance: creation of course objectives, creation/selection of learning objects and tasks, and development of feedback rubrics; course build in preferred LMS; course customization with client graphics and resources; respond to client feedback; course audit; asynchronous instruction and feedback	10	2,300.00	23,000.00
08/05/2024	On-site preservice training: 2 trainers for 2 days of training per cohort, divided into north and south.	8	2,800.00	22,400.00
	Quarter 1 Learning Progression, Resource Alignment, Create Unit Exemplar			

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Thank you for your business!

DATE	ACTIVITY	# OF DAYS	HOURLY/DAILY RATE	AMOUNT
09/09/2024	On-site campus visits: 2 days at Tier 1 and Tier 2 schools; 3 days at Gadsden; and 4 days at Las Cruces. There will be 2 trainers in each district for each visit.	70	2,800.00	196,000.00
09/18/2024	Modeling Math Instruction, Planning conversations, Observe Math Instruction Q1 virtual support, divided into 0.5 day per cohort.	1	2,300.00	2,300.00
09/18/2024	Reflect on Q1, Review Submitted Artifacts, Identify Learning Progression and Goals for Q2 Q1 virtual support for administrators, divided into 0.5 day per cohort.	1	2,300.00	2,300.00
11/04/2024	Reflect on Q1, Review Submitted Artifacts, Change Management Conversations, Create Artifacts Monitoring, Supporting, and Sustaining Implementation Q2 virtual support, divided into 0.5 day per cohort.	1	2,300.00	2,300.00
11/04/2024	Reflect on Q2, Review Submitted Artifacts, Change Management Conversations, Identify Learning Progression Goals for Q3 Q2 virtual support for administrators, divided into 0.5 day per cohort.	1	2,300.00	2,300.00
01/27/2025	Reflect on Q2, Review Submitted Artifacts, Change Management Conversations, Create Artifacts Monitoring, Supporting, and Sustaining Implementation On-site training: 2 days of training per cohort, 2 trainers each day	8	2,800.00	22,400.00
02/03/2025	Assessment Design Training, Evaluating Existing Assessment, Writing Assessment Tasks Q3 virtual support for administrators, divided into 0.5 day per cohort.	1	2,300.00	2,300.00
04/07/2025	Reflect on Q3, Review Submitted Artifacts, Change Management Conversations, Create Artifacts Monitoring, Supporting, and Sustaining Implementation Q4 virtual support, divided into 0.5 day per cohort.	1	2,300.00	2,300.00
	Reflect on Y1, Review Submitted Artifacts, Change Management Conversations, Identify Goals for Y2			

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DATE	ACTIVITY	# OF DAYS	HOURLY/DAILY RATE	AMOUNT
04/07/2025	Q4 virtual support for administrators, divided into 0.5 day per cohort.	1	2,300.00	2,300.00
	Reflect on Y1, Review Submitted Artifacts, Change Management Conversations, Create Artifacts Monitoring, Supporting, and Sustaining Implementation, Identify Goals for Y2			
05/19/2025	CES project monitoring: designated time for monthly virtual project monitoring	2	2,300.00	4,600.00
05/21/2025	On-site executive committee meeting and designated time for monthly in-person project monitoring	2	2,800.00	5,600.00
05/21/2025	Artifact Review: 0.5 day per district, per semester.	16	2,300.00	36,800.00
	Identify Trends in Submitted Artifacts			
06/09/2025	On-site summer training: 4 days of training, centrally located, with 3 trainers each day.	12	2,800.00	33,600.00
	Develop tools for promoting cognitive engagement and building student thinking in the mathematics classroom			

New Mexico CES 24-25 Math

TOTAL **\$378,900.00**

THANK YOU.

Accepted By

Accepted Date

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Quote For Proposed Services 1413



ADDRESS

David Chavez
Cooperative Educational
Services
10601 Research Rd. SE
Albuquerque, NM 87198 USA

DATE
01/09/2024

TOTAL
\$105,700.00

DATE	ACTIVITY	# OF DAYS	HOURLY/DAILY RATE	AMOUNT
01/09/2024	THIS IS FOR THE 2023-2024 SCHOOL YEAR.	0	0.00	0.00
01/09/2024	ACTUAL DATES TBD. All dates are placeholders until final dates are agreed upon.	0	0.00	0.00
01/09/2024	This proposal establishes the ceiling and the actual work will not exceed the total amount listed in this proposal. AAIS is committed to finding ways to decrease the cost for our clients.	0	0.00	0.00
01/09/2024	All prices listed in this proposal include travel-related expenses.	0	0.00	0.00
03/11/2024	Strategic planning: data analysis, problem solving, development and revision of tools and processes, and coordination of logistics	4	2,200.00	8,800.00
03/18/2024	LMS creation: creation of course objectives, creation/selection of learning objects and tasks, and development of feedback rubrics; course build in preferred LMS; course customization with client graphics and resources; respond to client feedback; course audit; asynchronous instruction and feedback	5	2,200.00	11,000.00
04/15/2024	On-site campus visits for Tier 1 and Tier 2 districts (1 day/district).	14	2,700.00	37,800.00
	Observe math instruction and meet with Instructional Leaders			

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Thank you for your business!

DATE	ACTIVITY	# OF DAYS	HOURLY/DAILY RATE	AMOUNT
04/15/2024	On-site campus visits for Gadsden and Las Cruces districts (2 days/district).	4	2,700.00	10,800.00
	Observe math instruction and meet with Instructional Leaders			
04/29/2024	On-site executive committee meeting and in-person project monitoring	1	2,700.00	2,700.00
05/06/2024	Monthly virtual project monitoring	1	2,200.00	2,200.00
06/10/2024	On-site summer Teacher Leader Cohort (based on each district's capacity – 75 attendees maximum). 4 days of training with 3 trainers per day.	12	2,700.00	32,400.00
	Focus is on mindsets, pedagogy, identifying priority standards, and teacher clarity.			
New Mexico CES 23-24 Math		SUBTOTAL		105,700.00
		TAX		0.00
			TOTAL	\$105,700.00

THANK YOU.

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Quote For Proposed Services 1415



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David Chavez
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10601 Research Rd. SE
Albuquerque, NM 87198 USA

DATE
01/09/2024

TOTAL
\$345,300.00

DATE	ACTIVITY	# OF DAYS	HOURLY/DAILY RATE	AMOUNT
01/09/2024	THIS IS FOR THE 2025-2026 SCHOOL YEAR.	0	0.00	0.00
01/09/2024	ACTUAL DATES TBD. All dates are placeholders until final dates are agreed upon.	0	0.00	0.00
01/09/2024	This proposal establishes the ceiling and the actual work will not exceed the total amount listed in this proposal. AAIS is committed to finding ways to decrease the cost for our clients.	0	0.00	0.00
01/09/2024	All prices listed in this proposal include travel-related expenses.	0	0.00	0.00
07/28/2025	Strategic planning: data analysis, problem solving, development and revision of tools and processes, and coordination of logistics	8	2,300.00	18,400.00
08/04/2025	LMS creation and maintenance: creation of course objectives, creation/selection of learning objects and tasks, and development of feedback rubrics; course build in preferred LMS; course customization with client graphics and resources; respond to client feedback; course audit; asynchronous instruction and feedback	10	2,300.00	23,000.00

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DATE	ACTIVITY	# OF DAYS	HOURLY/DAILY RATE	AMOUNT
08/05/2025	On-site preservice training: 2 trainers for 2 days of training per cohort, divided into north and south.	8	2,800.00	22,400.00
	Develop tools for promoting cognitive engagement and building student thinking in the mathematics classroom. Create exemplar lessons.			
09/08/2025	On-site campus visits: 2 days at Tier 1 and Tier 2 schools; 3 days at Gadsden; and 4 days at Las Cruces. There will be 2 trainers in each district for each visit.	70	2,800.00	196,000.00
	Modeling Math Instruction, Planning conversations, Observe Math Instruction			
09/17/2025	Q1 virtual support, divided into 0.5 day per cohort.	1	2,300.00	2,300.00
	Reflect on Q1, Review Submitted Artifacts			
09/17/2025	Q1 virtual support for administrators, divided into 0.5 day per cohort.	1	2,300.00	2,300.00
	Reflect on Q1, Review Submitted Artifacts, Change Management Conversations, Create Artifacts Monitoring, Supporting, and Sustaining Implementation			
11/03/2025	Q2 virtual support, divided into 0.5 day per cohort.	1	2,300.00	2,300.00
	Reflect on Q2, Review Submitted Artifacts			
11/03/2025	Q2 virtual support for administrators, divided into 0.5 day per cohort.	1	2,300.00	2,300.00
	Reflect on Q2, Review Submitted Artifacts, Change Management Conversations, Create Artifacts Monitoring, Supporting, and Sustaining Implementation			
01/26/2026	On-site training: 2 days of training per cohort, 2 trainers each day	8	2,800.00	22,400.00
	Develop tools for promoting cognitive engagement and building student thinking in the mathematics classroom. Create exemplar lessons.			
02/02/2026	Q3 virtual support for administrators, divided into 0.5 day per cohort.	1	2,300.00	2,300.00
	Reflect on Q3, Review Submitted Artifacts, Change Management Conversations, Create Artifacts Monitoring, Supporting, and Sustaining Implementation			

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DATE	ACTIVITY	# OF DAYS	HOURLY/DAILY RATE	AMOUNT
04/06/2026	Q4 virtual support, divided into 0.5 day per cohort.	1	2,300.00	2,300.00
	Reflect on Y2, Review Submitted Artifacts, Change Management Conversations, Identify Goals for Sustainability			
04/06/2026	Q4 virtual support for administrators, divided into 0.5 day per cohort.	1	2,300.00	2,300.00
	Reflect on Y2, Review Submitted Artifacts, Change Management Conversations, Create Artifacts Monitoring, Supporting, and Sustaining Implementation, Identify Goals for Sustainability			
05/18/2026	CES project monitoring: designated time for monthly virtual project monitoring	2	2,300.00	4,600.00
05/20/2026	On-site executive committee meeting and designated time for monthly in-person project monitoring	2	2,800.00	5,600.00
05/22/2026	Artifact Review: 0.5 day per district, per semester.	16	2,300.00	36,800.00

Identify Trends in Submitted Artifacts

New Mexico CES 25-26 Math

TOTAL

\$345,300.00

THANK YOU.

Accepted By

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AAIS New Mexico Math Proposal Narrative

Purpose and Overview

The Current Math Classroom and the AAIS Vision for What It Could Be

Traditional math instruction focuses more on teacher modeling and with the expectation that students will perform the procedural or develop procedural fluency by focusing on algorithms, but it deprives the student of critical thinking. Traditional math instruction does not develop problem solving skills; rather, it focuses on rote memory of algorithmic, procedural fluency, but when students encounter problems that are complex, that they've never seen before, that don't have a routine solution that are unfamiliar to them, they are poorly equipped to address those challenges. We believe traditional math instruction does not honor or develop students' thinking and deep learning.

- But imagine a classroom that honors students' creativity and allows them to think flexibly about rich mathematical concepts.
- Imagine a classroom where thinking is evident, where every student is held accountable for understanding and explaining mathematics.
- Imagine a classroom full of rich mathematical language, where students communicate their ideas and work together to develop a deep understanding of the content.
- Imagine a classroom full of questions, where student input pushes the conversation to greater levels.
- Imagine a classroom with scaffolds and supports, where ALL learners have an entry point to the content and have supports in place to help them make sense of their learning.
- Imagine a classroom with a clear roadmap through learning, with predetermined checkpoints along the way.
- Imagine a classroom where students communicate their next steps for sense making and advocate for themselves.
- Imagine a classroom where mistakes are welcomed and encouraged, where "answer-getting" is discouraged and problem-solving is the only way.

This is the AAIS vision of mathematical instruction, and we believe the time to make this change is now.



Implementing change that impacts learning in the math classroom requires common, accurate, and clear understanding through reflection on current practices and outcomes in classrooms on individual, course-alike, and department levels. The AAIS approach for bringing about this change will focus on the four core strands:

(1) Essential Understandings in Mathematics Content and Concepts

As we work with teachers to develop a new concept of math instruction, teachers will experience training that helps them develop an essential understanding of all core mathematical concepts. Through hands-on experience doing rich math tasks, teachers will develop a common understanding of priority standards and work to develop common proficiency scales that will establish common minimum expectations for students across classrooms, campuses, and complexes. The Teacher Leader Cohorts will develop exemplar unit plans that include detailed unpacking of priority standards, learning objectives and success criteria, learning progressions and assessment blueprints. Special attention will be given to vertical alignment conversations.

(2) Rigorous and Equitable Instruction for ALL Students of Mathematics

AAIS believes that true math success looks like math classrooms that challenge, support, and ultimately engage ALL learners. The Teacher Leader Cohorts will develop tools for moving students away from "studenting" behaviors (Liljedahl, 2020) i.e., avoiding, mimicking, etc. and increase the amount of true problem solving in their classrooms. The Teacher Leader Cohort will develop a toolbox of routines that will gain evidence of thinking from every student every day. Teachers will further increase engagement by learning a variety of Universal Design for Learning strategies to support students in the processing, expression, and engagement of rigorous mathematics.

(3) Leadership and Coaching for Equitable Teaching and Learning in Mathematics

State, District, and Building Level Instructional Leaders will also experience cohort training as well as learn coaching techniques and strategies to support teacher growth in targeted training. Specific coaching training will include look-fors and strategies to help teachers reflect and improve with a growth mindset. Leaders will learn tools for building and sustaining a strong math culture in their buildings. Leaders should be a part of and attend all cohort training as well as their own training specific to coaching instruction with regards to mathematics.

Training for evaluators is also key for implementation success, both short and long term. AAIS consultants will work with administration on both evaluation techniques as well as coaching strategies, along with the importance of both roles. It is important for evaluators to be able to shift purposefully between coaching and evaluative practices and communicate intentions of meetings with teachers. Evaluators must also understand the importance of consistent



expectations and messaging to the cohort as well as the remainder of the department yet to be trained.

Head principals must also understand the need for consistent communication of goals and what is important and why this change is taking place. They should attend training when possible - even if for a brief time.

(4) Development of Professional Learning Modules to Support the Teacher Leader Cohorts

Professional learning modules to support the Teacher Leader Cohort will be developed after each training based on delivered content along with reflection and feedback from trainers/participants. Modules will be accessed through a shared source (such as an approved Learning Management System that can be accessed and/or downloaded.)

This intent of this resource will be to provide resources for future Teacher Leader Cohort work such as:

- Change management
- Instructional resources for thinking classrooms in mathematics
- Leadership during change
- Protocols to structure planning, analysis, and reflection conversations
- Presentations with notes
- Timelines for implementation

These modules and resources will be archived and further developed to use with teachers across the state to spread the work of the Teacher Leader Cohort to all campuses and districts.

Support is Responsive and Easily Accessible

AAIS will deliver training and support through a variety of methods, including onsite professional development, virtual training, and support both synchronous and asynchronous. We would also create a virtual classroom using an approved learning management system. We would also make representatives from the state instructors in the classroom so they can keep the work going after our role goes away.



Tools for Progress Monitoring

AAIS will develop a survey instrument used to gauge understanding and implementation. The survey instrument will be used to evaluate beliefs and understanding after each training session. Each survey will include the following questions:

- 1) How engaged were you during the training?
- 2) What ideas resonated with you the most during this training?
- 3) To what degree are the policies, procedures, and infrastructure in your building supporting your implementation of these practices?
- 4) How likely are you to implement these practices in your instruction?
- 5) Do you perceive student learning to improve because of implementing these practices?
- 6) Based on your learning today, what is at least one new action you intend to take in your classroom?

AAIS will work to develop an Innovation Configuration Map (IC Map) to establish a vision of the ideal implementation of all domains of this initiative. We will use this IC Map to develop a map through the necessary levels of change as we work to develop a new way of delivering math instruction. Instructional leaders will be trained in how to utilize the IC Maps through calibration activities that include self-assessment and reflection.

AAIS will work with teacher leaders to collect classroom artifacts to review and create a collection of exemplar teaching and learning documents.

AAIS will develop walkthrough tools to support teacher leaders as they gather data during instructional rounds. State, district, and campus leaders will be trained in a common process for completing instructional rounds and will utilize a central reporting hub to further calibrate our work across campuses and districts.



2023-2024 SY				
Date	Event		# Days	Proposed Goals
April-May 2024	Campus Visits	1 day for Tier 1 & 2 Districts 2 days for Gadsden and Las Cruces	18	Observe Math Instruction, Meet with Instructional Leaders
June 2024	Summer Teacher Leader Cohort (based on each district's capacity - Max of 75 ppl)	4 Days of Training Centrally Located 3 Trainers	12	Mindsets, Pedagogy, Identify Priority Standards, Teacher Clarity
23-24	CES Project Monitoring		1	Designated Time for Monthly Virtual Project Monitoring
23-24	Executive Committee Meeting		1	Designated Time for Monthly In-Person Project Monitoring
23-24	Strategic Planning		4	Data analysis, Problem Solving, Development and Revision of Tools and Processes, Coordination of Logistics
23-24	LMS Creation		5	Creation of Course objectives, Creation/selection of learning objects and tasks, Development of feedback rubrics, Course build in preferred LMS, Course customization w/client graphics and resources, Respond to client feedback, Course Audit, Asynchronous Instruction and Feedback
23-24				
In-Person		31		
Virtual		10		



2024-2025 SY				
August 2024	Pre-Service	2 Days of Training Per Cohort Divided in to North and South 3 trainers	8	Quarter 1 Learning Progression, Resource Alignment, Create Unit Exemplar
Fall 2024	Campus Visits	2 Days for Tier 1&2 3 Days Gadsden 4 Days Las Cruces 'two trainers in each district for each visit'	70	Modeling Math Instruction, Planning conversations, Observe Math Instruction
Q1 Fall 2024	Quarterly Cohort Virtual	1/2 Day of Virtual Support Per Cohort	1	Reflect on Q1, Review Submitted Artifacts, Identify Learning Progression and Goals for Q2
Q1 Fall 2024	Quarterly Cohort Virtual - Admin	1/2 Day of Virtual Support Per Cohort	1	Reflect on Q1, Review Submitted Artifacts, Change Management Conversations, Create Artifacts Monitoring, Supporting, and Sustaining Implementation
Q2 Fall 2024	Quarterly Cohort Virtual	1/2 Day of Virtual Support Per Cohort	1	Reflect on Q2, Review Submitted Artifacts, Change Management Conversations, Identify Learning Progression Goals for Q3
Q2 Fall 2024	Quarterly Cohort Virtual - Admin	1/2 Day of Virtual Support Per Cohort	1	Reflect on Q2, Review Submitted Artifacts, Change Management Conversations, Create Artifacts Monitoring, Supporting, and Sustaining Implementation
Q3 Spring 2025	Cohort Visits	2 Days of Training Per Cohort 2 trainers	8	Assessment Design Training, Evaluating Existing Assessment, Writing Assessment Tasks
Q3 Spring 2025	Quarterly Cohort Virtual - Admin	1/2 Day of Virtual Support Per Cohort	1	Reflect on Q3, Review Submitted Artifacts, Change Management Conversations, Create Artifacts Monitoring, Supporting, and Sustaining Implementation



2024-2025 SY				
Q4 Spring 2025	Quarterly Cohort Virtual	1/2 Day of Virtual Support Per Cohort	1	Reflect on Y1, Review Submitted Artifacts, Change Management Conversations, Identify Goals for Y2
Q4 Spring 2025	Quarterly Cohort Virtual - Admin	1/2 Day of Virtual Support Per Cohort	1	Reflect on Y1, Review Submitted Artifacts, Change Management Conversations, Create Artifacts Monitoring, Supporting, and Sustaining Implementation, Identify Goals for Y2
June 2025	Summer Cohort	4 Days of Training Centrally Located 3 Trainers	12	Develop tools for promoting cognitive engagement and building student thinking in the mathematics classroom.
24-25	CES Project Monitoring		2	Designated Time for Monthly Virtual Project Monitoring
24-25	Executive Committee Meeting		2	Designated Time for Monthly In-Person Project Monitoring
24-25	Strategic Planning		8	Data analysis, Problem Solving, Development and Revision of Tools and Processes, Coordination of Logistics
24-25	Artifact Review (1/2 day per district, per semester)		16	Identify Trends in Submitted Artifacts
24-25	LMS Creation, Maintenance		10	Creation of Course objectives, Creation/selection of learning objects and tasks, Development of feedback rubrics, Course build in preferred LMS, Course customization w/client graphics and resources, Respond to client feedback, Course Audit, Asynchronous Instruction and Feedback
24-25				
In-Person		100		
Virtual		43		



2025-2026 SY				
August 2025	Pre-Service	2 Days of Training Per Cohort Divided in to North and South 2 trainers	8	Develop tools for promoting cognitive engagement and building student thinking in the mathematics classroom. Create exemplar lessons.
Fall 2025	Campus Visits	2 Days for Tier 1&2 3 Days Gadsden 4 Days Las Cruces 'two trainers in each district for each visit'	70	Modeling Math Instruction, Planning conversations, Observe Math Instruction
Q1 Fall 2025	Quarterly Cohort Virtual	1/2 Day of Virtual Support Per Cohort	1	Reflect on Q1. Review Submitted Artifacts
Q1 Fall 2025	Quarterly Cohort Virtual - Admin	1/2 Day of Virtual Support Per Cohort	1	Reflect on Q1. Review Submitted Artifacts. Change Management Conversations, Create Artifacts Monitoring, Supporting, and Sustaining Implementation
Q2 Fall 2025	Quarterly Cohort Virtual	1/2 Day of Virtual Support Per Cohort	1	Reflect on Q2, Review Submitted Artifacts
Q2 Fall 2025	Quarterly Cohort Virtual - Admin	1/2 Day of Virtual Support Per Cohort	1	Reflect on Q2, Review Submitted Artifacts, Change Management Conversations, Create Artifacts Monitoring, Supporting, and Sustaining Implementation
Q3 Spring 2026	Cohort Visits	2 Days of Training Per Cohort 2 trainers	8	Develop tools for promoting cognitive engagement and building student thinking in the mathematics classroom. Create exemplar lessons.
Q3 Spring 2026	Quarterly Cohort Virtual - Admin	1/2 Day of Virtual Support Per Cohort	1	Reflect on Q3, Review Submitted Artifacts, Change Management Conversations, Create Artifacts Monitoring, Supporting, and Sustaining Implementation



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2025-2026 SY				
Q4 Spring 2026	Quarterly Cohort Virtual	1/2 Day of Virtual Support Per Cohort	1	Reflect on Y2, Review Submitted Artifacts, Change Management Conversations, Identify Goals for Sustainability
Q4 Spring 2026	Quarterly Cohort Virtual - Admin	1/2 Day of Virtual Support Per Cohort	1	Reflect on Y2, Review Submitted Artifacts, Change Management Conversations, Create Artifacts Monitoring, Supporting, and Sustaining Implementation, Identify Goals for Sustainability
25-26	CES Project Monitoring		2	Designated Time for Monthly Virtual Project Monitoring
25-26	Executive Committee Meeting		2	Designated Time for Monthly In-Person Project Monitoring
25-26	Strategic Planning		8	Data analysis, Problem Solving, Development and Revision of Tools and Processes, Coordination of Logistics
25-26	Artifact Review (1/2 day per district, per semester)		16	Identify Trends in Submitted Artifacts
25-26	LMS Creation, Maintenance		10	Creation of Course objectives, Creation/selection of learning objects and tasks, Development of feedback rubrics, Course build in preferred LMS, Course customization w/client graphics and resources, Respond to client feedback, Course Audit, Asynchronous Instruction and Feedback
25-26				
In-Person		88		
Virtual		43		

Totals					
23-24		24-25		25-26	
In-Person	31	In-Person	100	In-Person	88
Virtual	10	Virtual	43	Virtual	43

CES – New Contracts Awarded Dec. 15 – Feb. 29, 2024		
RFP	Awardee	Contract Number
2024-15 School Activity Buses Cat 1 – Lot 1	Roberts Truck Center Tillery Chevrolet – GMC, Inc. Lonestar Freightliner Group LLC Phil Long Dealerships, Inc Model 1 Commercial Vehicles, Inc	2024-15-C111-ALL 2024-15-C112-ALL 2024-15-C113-ALL 2024-15-C114-ALL 2024-15-C115-ALL
2024-15 School, Activity Buses Cat 1 – Lot 2	Lonestar Freightliner Group LLC Model 1 Commercial Vehicles, Inc	2024-15-C121-ALL 2024-15-C122-ALL
2024-16 Public Safety – EMS Equipment, Supplies, Maintenance, Repair and Related Cat 1 Lot 2	Kickbox Leasing, LLC Axon Enterprises AED One Stop	2024-16-C121-ALL 2024-16-C122-ALL 2024-16-C123-ALL
2024-16 Public Safety - Body Work Camera Equipment, Supplies, Maintenance, Repair and Related Cat 2 – Lot 1	Pro-Vision Solutions, LLC Advanced Communications & Electronics Axon Enterprises	2024-16-C211-ALL 2024-16-C212-ALL 2024-16-C213-ALL
2024-16 Public Safety – Two-Way Communication K12 Radio Equipment, Supplies, Maintenance, Repair and Related Cat 2 – Lot 2	Advanced Communications & Electronics Tactical Headsets Sweden AB	2024-16-C221-ALL 2024-16-C-222-ALL
2024-16 Public Safety – First Responder Uniforms, Clothing, Footwear, Gear, Equipment Supplies, Accessories and Related Cat 2 – Lot 3	Dawg Police and Fire Gear LLC Kickbox Leasing, LLC	2024-16-C231-ALL 2024-16-C232-ALL
2024-17 Utilities – Products, Services, and Related Cat 1 “Water” - Lot 1 “Product”	Smith & Aguirre Construction Co., Inc Environworks, LLC	2024-17-C111-8 2024-17-C112-ALL
2024-17 Utilities – Products, Services and Related Cat 1 “Water” - Lot 2 “Turnkey”	Global Maven Enterprises Smith & Aguirre Construction Co., Inc L&T Services Environworks, LLC B&D Industries Rhoads, Co.	2024-17-C121-ALL 2024-17-C122-8 2024-27-C123-12 2024-17-C124-ALL 2024-17-C125-4 2024-17-C126-6
2024-17 Utilities – Products, Services, and Related Cat 2 “Electric” - Lot 1 “Product”	Smith & Aguirre Construction Co., Inc Environworks, LLC	2024-17-C211-8 2024-17-C212-8
2024-17 Utilities – Products, Services, and Related Cat 2 “Electric” – Lot 2 “Turnkey”	Global Maven Enterprises Smith & Aguirre Construction Co., Inc Environworks, LLC B&D Industries, Inc	2024-17-C221-ALL 2024-17-C222-8 2024-17-C223-ALL 2024-17-C224-4
2024-17 Utilities – Products, Services, and Related Cat 3 “Gas” – Lot 1 – “Product”	Smith & Aguirre Construction Co., Inc Environworks	2024-17-C311-8 2024-17-C312-ALL

2024-17 Utilities – Products, Services, and Related Cat 3 “Gas” - Lot 2 “Turnkey”	Global Maven Enterprises Smith & Aguirre Construction Co., Inc AR Mechanical Environworks, LLC B&D Industries, Inc Rhoads, Co Monarch Heating & Cooling LLC	2024-17-C321-ALL 2024-17-C322-8 2024-17-C323-ALL 202417--C324-All 2024-17-C325-4 2024-17-C326-6 No Award
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2023-2024 Strategic Plan

Periodic Reporting

Ancillary:

Goal 1: Operational Efficiencies and Customer Service Excellence.

July	<ol style="list-style-type: none">1. Recruitment and retention: Interviewed 3, recommending 2, 1 resigned. Staff Count: 212 Initiated Affiliation Agreement with UNM SHS Dept. Encouraged APS to provide "Office Hours" for remote staff to support consistency and provide momentum.2. Explore IT uses to support Ancillary Dept responsibilities. Have not delved into AI yet.
August	<ol style="list-style-type: none">1. Recruitment and retention: Interviewed 15, recommending 9, 1 resigned. Staff Count 223 Placed first BMS in Socorro.2. Explore IT uses to support Ancillary Dept responsibilities. Have not delved into AI yet.
September	<ol style="list-style-type: none">1. Recruitment and retention: Interviewed 0. Staff count: 224 Placed first BMS in Socorro.2. Explore IT uses to support Ancillary Dept responsibilities. professional development in the area of Excel is indicated.3. In addition to our current Strategic Plan, we are happy to report, with the help of Val Yoakum and her son, a UNM Accountant, we have automated our Overage Audit to 100% accuracy. This has reduced a 5 –7 hour job to approximately 10 minutes. From this same report we can provide accurate "Weekly Hours" report to HR for NMPSIA compliance, reducing from 3 hours to 10 minutes.
90 Day Plan	<ol style="list-style-type: none">1. Continue to interview.2. Look for support to learn Excel, and begin the process for learning about the Presence Learning platform.
October	<ol style="list-style-type: none">1. Recruitment and retention: Interviewed: 5 Recommend 4 to hire. Retired/Resigned: 1. Staff Count: 226, up by 3.2. Watch the Small Towns; Big Transformations regarding AI.
November	<ol style="list-style-type: none">1. Recruitment and Retention: Interviewed – 1

	<p>Resign/Retire - 1 Active Staff count – 225 Total Allocations requested EOM Nov: 471 Total Allocations assigned to staff: 409 Remaining Vacancy requests: 63</p> <p>2. The <u>Presence Learning</u> platform is best purchased by the individual Diagnostician or the district/charter if they find themselves in the position of doing remote evaluations. Given the popularity for remote evaluations is marginal in New Mexico, this has not come up with any of our Diagnosticians.</p>
December	<p>1. Recruitment and Retention: Interviewed – 7 Resign/Retire - 3 at end of December Staff count – 226 (6 of 7 have not yet been placed) Total Allocations requested EOM Nov: 482 Total Allocations assigned to staff: 416 Remaining Vacancy requests: 66</p> <p>2. Have not explored AI or Microsoft 365 much.</p>
90 Day Plan	<p>1. Continue to interview. 2. Work on learning more about Microsoft 365.</p>
January	<p>Recruitment: Interviewed – 12, 7 of the 12 recommended to hire. Resign/Retire – 6 total for the 2nd Quarter, (one on long term medical – leave.) Staff count: 228 Total Allocations requested 2nd Quarter: 482 Total Allocations assigned to staff: 416 Remaining Vacancy requests: 66</p>
February	<p>Recruitment: Interviewed – 2, Hired 2. Resign/Retire – no change Staff count: 233 Total Allocations requested by end of February: 504 Total Allocations assigned to staff: 447 Remaining Vacancy requests: 67- 3 are pending introductions. Explore additional IT uses to support Ancillary Dept. responsibilities. After with NCCE, we are using Microsoft Dynamics 365 more and finding uses for our department. Looking forward to MD 365 training.</p>
March	
90 Day Plan	

April	
May	
June	
90 Day Plan	

Goal 2: Professional Development, Quality Instructional and Educational Leadership

July	<ol style="list-style-type: none"> 1. Expand PD opportunities for department staff. First CPI training complete for Ancillary staff. Indicator 13 & 14 training for Transition Specialists has taken place. 2. Staff development/promote tuition reimbursement. Discussing what the focus should be regarding priorities in learning more regarding technology.
August	<ol style="list-style-type: none"> 1. Expand PD opportunities for department staff. <ol style="list-style-type: none"> A. <u>CPI Training</u> 8/2 – SABE Regular Ed 8/4 – Socorro Consolidated Schools 8/11 – Alce King Regular Ed 8/12 -- CES Ancillary Staff Refresher 8/17 & 8/18 – Alice King Full Course B. Autism Evaluation Training: Update – We found an online training for the ADOS-2 That seems to be a good alternative and less cost prohibitive than last year's choice at \$712.00 a person instead of several thousands of dollars. The trainers in some cases are co-authors of the ADOS-2 Battery. Participants are provided Certification of Completion documentation will be provided via email the week following the workshop. 2. Staff development/promote tuition reimbursement. Discussing what areas we feel need to be a priority as a department in learning more regarding technology. Mostly pointing to Excel. To consider learning AI for Excel, means we need to understand more about Excel to begin with.
September	<ol style="list-style-type: none"> 1. Expand PD opportunities for ancillary and department staff. <ol style="list-style-type: none"> A. <u>CPI Training:</u> 9/9 - CES 9/22 Mescalero Apache 9/23 & 9/30 CES 9/25 Montessori of the Rio Grande 9/28 Socorro Public Schools

	<p>B. <u>ADOS-2 Autism Evaluation</u>: 2 additional staff are registered.</p> <p>C. <u>Greenshades</u> rollout for Ancillary still TBD.</p> <p>D. Transition Specialists have indicated they are getting training on <u>Indicator 13 & 14</u> through their respective institutions.</p> <p>2. Staff Development.</p> <p>A. Confirmed need for Excel PD.</p>
90 Day Plan	<p>1. We will explore recruiting another trainer for CPI and do a market comparison to be sure we are in a competitive position.</p> <p>2. We will look at ways to be trained in Excel that will be a minimal interruption for workflow in the Ancillary Department.</p>
October	<p><u>Autism Evaluation Training</u>:</p> <p>Staff are utilizing this training with the last month available being November. All that will be attending that have registered and then it will be closed for this school year.</p> <p><u>CPI Training for an October total of 30 teachers and staff</u>:</p> <p>Sept 30th - Montessori of the Rio Grande - CPI Blended Refresher Training</p> <p>October 14th – CES CPI Blended Refresher Training.</p> <p>October 19th - Cien Aguas Charter, CPI Blended Refresher Training</p> <p>October 25th - Los Alamos School District – CPI Blended Refresher Training</p> <p><u>Greenshades</u> roll-out TBD regarding when Ancillary staff.</p> <p><u>Events for October</u>:</p> <p>Val/Angelina: Assisting with Reception area.</p> <p>Facilities Manager Conference (and Pumpkin Contest)</p> <p>Increased POs from 92 to 119.</p> <p>Staff changes in Bernalillo & Pecos School Districts.</p> <p>Added Las Cumbres Community Services and Haak'u Community Academy from Pueblo of Acoma as new Participating Entities for ancillary services.</p>
November	<p>Professional Development</p> <p>1a. <u>CPI</u>:</p> <p>11/8/23: ABQ talent & Development Charter, International School at Mesa Del Sol and DORN (all together) – Full CPI, 20 participants.</p> <p>1b. <u>Autism Evaluation Training, ADOS-2</u>: Five Ancillary Staff have received their Certificates. Support from CES for Professional Development for Ancillary Staff has reached its budgetary limits.</p> <p>1c. <u>Transition Indicator 13 & 14 training done.</u></p> <p>1d. <u>Greenshades</u> is still on hold regarding training Ancillary field staff.</p> <p>2a. Looking for <u>Excel training</u> that will minimally interrupt the workday.</p> <p>2b. Promoting tuition reimbursement to Ancillary office staff.</p>
December	<p>Professional Development</p> <p>1a. <u>CPI</u>:</p> <p>12/20 - Mountain Mahogany- 7 participants</p> <p>1b. <u>Autism Evaluation Training, ADOS-2</u>:</p> <p>I have closed Professional Development for the rest of the year. We have spent our budgeted amount.</p>

	<p>1c. <u>Transition Indicator 13 & 14 training done.</u></p> <p>1d. <u>Greenshades</u> is still on hold regarding training Ancillary field staff.</p> <p>2a. Looking for <u>Excel training</u> that will minimally interrupt the workday. Still Looking.</p> <p>2b. Promoting tuition reimbursement to Ancillary office staff.</p>
90 Day Plan	<p>1. I think we may have another possible trainer for CPI. We will work with CPI and this person for Spring schedules.</p> <p>2. We will look at ways to be trained in Excel that will be a minimal interruption for workflow in the Ancillary Department.</p>
January	<p>1. Expand PD opportunities for staff.</p> <ul style="list-style-type: none"> a. CPI has taken place in the 2nd Quarter with 74 participants. <ul style="list-style-type: none"> i. CES – Full Course & Refresher ii. Cien Aguas – Full Course and Refresher iii. Los Alamos Schools– Regular Education iv. Montessori of the Rio Grande– Full course and Refresher v. International School at Mesa Del Sol & Dorn Charter -- Full Course vi. Montessori Elementary & Middle School – Full Course b. CES is looking at professional development to include Excel for staff which is Ancillary’s primary request regarding PD for Software platforms. <p>2. Staff Development: Promote Tuition Reimbursement.</p> <ul style="list-style-type: none"> a. Still having discussions as to what would be beneficial.
February	<p>Expand PD opportunities for staff.</p> <p>Multiple CPI classes in February with 35participants.</p> <p>Staff Development: Promote Tuition Reimbursement.</p> <p>No discussion this month.</p>
March	
90 Day Plan	
April	
May	
June	
90 Day Plan	

Procurement:

July	1. "Kaizen"	Continuous review, analysis, and optimization of Proc. Dept. processes and systems
	2. Procurement Department Website Update	Will begin when marketing Co. Is hired
	3. New Procurement Offerings, Products & Services, to Members	Hired John King, <i>Member & Procurement Analyst</i> , to support & manage the RS Means (JOC Core) construction platform with the objective of making JOC Core the platform of choice for members. • In effect, John's hiring launched CES Procurement PaaS (Procurement as a Service)
	4. Growth through Strategic Partnerships	Continue to nurture current (i.e., NMPED) and develop new strategic partnerships (i.e., AT&T Education).
	5. 5.Annual review of vendors	Will begin May 2024
August	1. "Kaizen"	Continuous review, analysis, and optimization of Proc. Dept. processes and systems
	2. Procurement Department Website Update	Will begin when marketing Co. Is hired
	3. New Procurement Offerings, Products & Services, to Members	John King (PaaS) making contacts w members & contractors. His involvement w reviews & mgt. Of RS Means (JOC Core) continues to grow. • CES does not charge members or vendors for JK's services, whereas members pay Gordian 6% for their review services.
	4. Growth through Strategic Partnerships	Continue to nurture current (i.e., NMPED) and develop new strategic partnerships (i.e., AT&T Education, Tribal).
	5. 5.Annual review of vendors	Will begin May 2024
September	1. "Kaizen"	Continuous review, analysis, and optimization of Proc. Dept. processes and systems
	2. Procurement Department Website Update	Will begin when marketing Co. Is hired
	3. New Procurement Offerings, Products & Services, to Members	John King's involvement w reviews & mgt. of RS Means (JOC Core) continues to grow as he presents in the regional mtgs. • CES Procurement added Richard Mtz., <i>Procurement & Contract Spec.</i> (starts 10/9) also to support the PaaS program CES Procurement is developing to diversify our line of procurement products & services and differentiate ourselves from our competitors. No other coop provides these services.
	4. Growth through Strategic Partnerships	Continue to nurture current (i.e., NMPED) and develop new strategic partnerships

		(i.e., AT&T Education, Tribal, external PEs).
	5. 5. Annual review of vendors	Will begin May 2024
90 Day Plan	<p>CES Procurement launched PaaS (Procurement as a Service) - to diversify our line of procurement products & services offered and differentiate ourselves from our competitors. No other coop provides these services.</p> <ul style="list-style-type: none"> • Added John King to provide addtl. Support services to Member and contractors. • Added Richard Mtz. to provide addtl. Support services to CES Procurement, produce more RFPs & contracts and better support members & vendors w. Growing demand of use of CES contracts. 	
October	2. "Kaizen"	Continuous review, analysis, and optimization of Proc. Dept. processes and systems
	2. Procurement Department Website Update	Will begin when marketing Co. Is hired
	4. New Procurement Offerings, Products & Services, to Members	<p>John King's involvement w reviews & mgt. of RS Means (JOC Core) continues to grow as he presents in the regional mtgs.</p> <ul style="list-style-type: none"> • CES Procurement added Richard Mtz., <i>Procurement & Contract Spec.</i> (starts 10/9) also to support the PaaS program CES Procurement is developing to diversify our line of procurement products & services and differentiate ourselves from our competitors. No other coop provides these services.
	5. Growth through Strategic Partnerships	Continue to nurture current (i.e., NMPED) and develop new strategic partnerships (i.e., AT&T Education, Tribal, external PEs).
	6. 5. Annual review of vendors	Will begin May 2024
November	3. "Kaizen"	Continuous review, analysis, and optimization of Proc. Dept. processes and systems
	2. Procurement Department Website Update	Will begin when marketing Co. Is hired
	5. New Procurement Offerings, Products & Services, to Members	<p>John King's involvement w reviews & mgt. of RS Means (JOC Core) continues to grow as he presents in the regional mtgs.</p> <ul style="list-style-type: none"> • CES Procurement added Richard Mtz., <i>Procurement & Contract Spec.</i> (starts 10/9) also to support the PaaS program CES Procurement is developing to diversify our line of procurement products & services and differentiate ourselves from our competitors. No other coop provides these services.
	6. Growth through Strategic Partnerships	Continue to nurture current (i.e., NMPED) and develop new strategic partnerships (i.e., AT&T Education, Tribal, external PEs).
	7. 5. Annual review of vendors	Will begin May 2024
December	4. "Kaizen"	Continuous review, analysis, and optimization of Proc. Dept. processes and systems

	2. Procurement Department Website Update	Will begin when marketing Co. Is hired
	6. New Procurement Offerings, Products & Services, to Members	John King's involvement w reviews & mgt. of RS Means (JOC Core) continues to grow as he presents in the regional mtgs. • CES Procurement added Richard Mtz., <i>Procurement & Contract Spec.</i> (starts 10/9) also to support the PaaS program CES Procurement is developing to diversify our line of procurement products & services and differentiate ourselves from our competitors. No other coop provides these services.
	7. Growth through Strategic Partnerships	Continue to nurture current (i.e., NMPED) and develop new strategic partnerships (i.e., AT&T Education, Tribal, external PEs).
	8. 5. Annual review of vendors	Will begin May 2024
90 Day Plan	<ul style="list-style-type: none"> • CES Procurement launched PaaS (Procurement as a Service) - to diversify our line of procurement products & services offered and differentiate ourselves from our competitors. No other coop provides these services. Continue to develop structure of services. • Continue the development of the new version of CES' eProcurement system. • Issuance of RFPs. 	
January		
February		
March		
90 Day Plan		
April		
May		
June		
90 Day Plan		

Business Administration:

July	<p>Action Plan 1: Have discussed training with Staples group on the software used at CES; Teams, Share Point, Excel, Word, Outlook.</p> <p>Action Plan 2: Discussed use of a CRM program to capture Procurement Partner and member contacts and their contact information. CRM program is on the horizon but probably will not be implemented for a few months. Continue to attend in state conferences to interact with Procurement Partners and members. Have not started on the Procurement Partner or member survey. Need to get with Digitech about the ability to allow Procurement Partners to view the documents they upload into Image Silo.</p> <p>Action Plan 3: Payroll efficiency is being addressed in two ways. One, using the GP Smart Connect function allows payroll data to be entered into a spreadsheet and then uploaded into GP for payroll processing. This eliminates the need to enter the same payroll data directly in GP using multiple screens for input. Two, GreenShades software is being purchased to aid in the processing of payroll. This software will also allow employees to view more detailed payroll information and manage their benefits.</p> <p>Action Plan 4: Working on list of potential Procurement Partners and members to be on the advisory groups.</p>
August	<p>Action Plan 1: Staples' method of training is geared more towards groups training on the software CES uses. Need to look at alternatives including the use of CES employees to do various training.</p> <p>Action Plan 2: CRM system still in the offing. Procurement Partner and members surveys have not been created. Discussions continue about Procurement Partners having the ability to see the documents they upload. Not as easy as first thought.</p> <p>Action Plan 3: GP Smart Connect fully functional. Green Shades implementation and training continues. The setup process is more time consuming than first realized. Meeting with GreenShades staff twice a week for setup guidance.</p>

	Action Plan 4: Input from staff on which Procurement Partners and members would be good on the advisory Committees.
September	<p>Action Plan 1: No finalization on best way to train employees on software has occurred. Big question is how does CES train new employees one at a time as these employees come on board with CES? It is felt that using online tutorials would not be the best way for this training. Continuing to explore options that meet employee needs while being cost effective.</p> <p>Action Plan 2: Still trying to figure out how to create lists for Procurement Partners and members so CES can send targeted messages to strategic contacts such as construction vendors or technology staff at member institutions.</p> <p>Action Plan 3: Continue meeting with GreenShades staff twice a week. Setup and implementation continue. Have discovered some items that will need further consideration such as the handling of the I-9 process and accounting for PTO and the reporting that goes with PTO.</p> <p>Action Plan 4: Reviewing the list of Procurement Partners and members given by staff to serve on the advisory committees.</p>
90 Day Plan	<p>90 Day Recap</p> <p>Action Plan 1: Have sought input from staff and training providers about the best way to train employees as a group and on a single employee basis.</p> <p>Action Plan 2: Attendance at conferences is happening and is on going</p> <p>Action Plan 3: GP Smart Connect is fully functional and has supplied a level of efficiency. The GreenShades implementation, guidance and training continues. CES meets with GreenShades staff twice per week.</p> <p>Action Plan 4: Reviewing the list of Procurement Partners and members given by staff to serve on the advisory committees.</p>
October	
November	
December	
90 Day Plan	

January	
February	
March	
90 Day Plan	
April	
May	
June	
90 Day Plan	

Human Resources:

July	<p>1a. Explore new HR platform to improve payroll/hr functions. Enhance operational efficiencies:</p> <p>a. Vetting payroll/hr systems with team</p> <p>1b. Greenshades meetings T & Th: Started 6/27-7/20</p> <p>1c. Maintain Customer Responsiveness: Open Enrollment outreach email for all employees, explaining the process; 13 phone calls with Ancillary, Prof Services employees.</p> <p>2a. Implement Staff survey to identify retention priorities: no action</p> <p>2b. Conduct Exit Surveys: Gallup agency doesn't do exit surveys for our subscription type. Will have to develop.</p> <p>2c. Use CES video, NMPSIA program guide: Have not used video, have been giving NMPSIA program guide to all new hires, 7/21, 7 Ancillary Employees received</p>
August	<p>1b. Greenshades meetings T & Th: 8/10-8/29</p> <p>1c. Maintain Customer Responsiveness: 12 phone calls Ancillary, Prof Services.; Nicole Brown First Financial, staff enrollment & info, 8/10, 8/17, 8/24. Open Enrollment assistance, 8 Ancillary employees.</p> <p>2a. Gallup Survey Training: No action</p> <p>2b. Conduct Exit Surveys: No action</p> <p>2c. Use CES video, NMPSIA program guide: have not used video, 1 Ancillary employee, program guide.</p>
September	<p>1b. Greenshades meetings Th: 9/7 & 9/27</p> <p>1c. Maintain Customer Responsiveness: Ancillary Newsletter, 4 phone calls, Ancillary, Prof Services.</p> <p>2a. Gallup Survey Training: no action</p> <p>2b. Conduct Exit Surveys: no action</p> <p>2c. Use CES video, NMPSIA program guide: 1 Office Staff Program Guide</p>
90 Day Plan	Now that the hiring has slowed, focus on the surveys and Professional services outreach.
October	1b: Greenshades meetings: 10/5, 10/12, 12/19, 10/26, created some HR Library documents, discussed concerns w/ 19 updates

	1c: Maintain customer responsiveness: Ancillary Newsletter, 6 phone calls Ancillary and Prof Services 2a: Gallup Survey Training: No Action 2b. Conduct Exit Surveys: No Action 2c. NMPSIA Program Guide, 1 Office Staff, 1 Ancillary
November	1b: Greenshades meetings: 11/2, 11/9, 11/30 1c. Maintain customer responsiveness: Ancillary Newsletter, 1 phone call Ancillary , NMPSIA Ambassador Training 2a. Gallup Survey Training: No Action 2b. Conduct Exit Survey: No Action 2c. 2 Prof Services
December	1b: Greenshades meetings: 12/7, 1c. Maintain customer responsiveness: Ancillary Newsletter with NMPSIA links to benefit resources, 0 phone calls 2a. Gallup Survey Training: received link and set up 2b. Conduct Exit Survey: No action
90 Day Plan	Test Greenshades onboarding, trained in Gallup survey as administrator, create Employee Exit Surveys.
January	
February	
March	
90 Day Plan	
April	
May	
June	
90 Day Plan	

Information Technologies:

July	Greenshades implementation for HR/Payroll. LEAP/Moodle setup/support for Cohort 5. Develop the business model for eProcurement (new name?) licensing, new features to include Reporting, Messaging, Member/Vendor/Admin dashboards. Tier-pricing models for modules. Explore integration with Business Office; HR/Payroll software. CES Software/IT Training curriculum to highlight Microsoft 365 AI
August	Ancillary – Need to meet to discuss Vacancy Dashboard/Report Procurement – Need to meet with RTS to discuss quick fixes and long-term rewrite for licensing opp. Business Office – Need to schedule Dynamics 365 demo with RSM PS – staying with Moodle LMS for LEAP, need to meet with LeAnne for ALD *Greenshades – data cleanse by 10/1; rollout by 11/1? *Need to determine CRM/AI use-case/training with Customer Relationship Training
September	Ancillary – Need to meet to discuss Vacancy Dashboard/Report and implementation of overage reporting Procurement – Met with RTS to discuss quick fixes and long-term rewrite for licensing opp. AEPA put out RFI/RFP, need to determine response/licensing/pricing/support Business Office – Need to schedule Dynamics 365 demo with RSM; integration with Member schools/entities PS – new payment process; initial discussion for application process
90 Day Plan	Ancillary – determine feasibility of vacancy/overage report for portal Procurement – AEPA response, rewrite for licensing Business Office – Dynamics 365 demo PS – application process, need to consolidate PS student data. *Greenshades – data cleanse by 10/1; rollout by 11/1? *Need to determine CRM/AI use-case/training with Customer Relationship Training
October	Ancillary – Need to meet to discuss Vacancy Dashboard/Report and implementation of overage reporting Procurement – Meetings with RTS for rewrite requirements Business Office – Need to schedule Dynamics 365 demo with RSM; integration with Member schools/entities PS – new LEAP single-form application starting in mid-March
November	Ancillary – Need to meet to discuss Vacancy Dashboard/Report and implementation of overage reporting Procurement – Meetings with RTS for rewrite requirements; screens 12/5 Business Office – Need to schedule Dynamics 365 demo with RSM; integration with Member schools/entities PS – new LEAP single-form application starting in mid-March
December	Ancillary – Need to meet to discuss Vacancy Dashboard/Report and implementation of overage reporting Procurement – Meetings with RTS for rewrite of screens Business Office – Need to schedule Dynamics 365 demo with RSM; integration with Member schools/entities PS – new LEAP single-form application ready for mid-March launch
90 Day Plan	Ancillary – determine feasibility of vacancy/overage report for portal Procurement – rewrite for licensing, marketing/SLA discussions to occur Business Office – Dynamics 365 demo PS – need to consolidate PS student data *Greenshades – need to review Payroll module for Greenshades/GP roadmap *Need to determine CRM/AI use-case/training with Customer Relationship Training

January	<p>Ancillary – Need to meet to discuss Vacancy Dashboard/Report and implementation of overage reporting</p> <p>Procurement – Meetings with RTS for rewrite of screens</p> <p>Business Office – Need to schedule Dynamics 365 demo with RSM; integration with Member schools/entities</p> <p>PS – new LEAP single-form application ready for mid-March launch</p>
February	<p>Ancillary – Need to meet to discuss Vacancy Dashboard/Report and implementation of overage reporting</p> <p>Procurement – Meetings with RTS for rewrite of screens; licensing</p> <p>Business Office – Dynamics 365 demo with RSM; Integrity Data for HR/Payroll</p> <p>*Microsoft Teams/OneDrive Trainings*</p>
March	
90 Day Plan	
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90 Day Plan	

LEAP:

July	<p>Completed Applications for Cohort 5, Accepted Cohort 5</p> <p>Developed 4-day all-coach retreat & prepared calendar and associated content for C5</p> <p>Distributed team leadership tasks and organizational needs for C5</p> <p>Developed Pre-Service Syllabus and Training</p> <p>Trained 200+ C5 Leapsters in Classroom environment, Lesson Planning, Material Prep, UDL</p>
August	<p>SOAR Report preparation to NMSU</p> <p>Title 2 preparation to DOE, In-Person Coaching for all Candidates began</p> <p>Full Team Meeting,</p> <p>Prepared PreService LateHire for 57 Candidates</p> <p>Closed applications to Candidates Aug. 4</p> <p>Doubled efforts around SPED Content Coaching for the year</p>
September	<p>Held Preservice LateHire For 57 candidates via zoom with coaches and new cohort</p> <p>Attended Governor's Literacy Summit with SITE</p> <p>Held in-person PD two different weekends for candidates to attend</p> <p>Submitted SOAR, held in-person PD in Artesia, Albuquerque and Las Cruces, Invoicing and billing districts and sites started, WIOA reporting began</p>
90 Day Plan	<p>National accreditation is postponed presently and an advisory will be developed after a revision to the application system (set for Oct/Nov, with Advisory needed early winter for a late spring application)</p>
October	<p>Submitting Title II to DOE (3rd week)</p> <p>Submitted RFA to NMPED for PD with ALD</p> <p>Virtual Coaching month for all coaches</p> <p>LEAP Release of 3 candidates for lacking homework, PD or training</p> <p>Ordered sweatshirts for LEAP staff, t-shirts for candidates</p>
November	<p>Received PD IGA from PED for \$175 for Alumni Conference</p> <p>Payment plans and invoicing continued for sites, districts and candidates</p> <p>New full time Administrative Assistant, Delores, began</p> <p>Facilitator, Ali Nava, resigned</p> <p>LEAP Advisory set for Dec. 1 virtually</p> <p>LANL Teacher Prep landscape analysis supported with NISN</p> <p>Test prep sessions held for Reading K-8, all LEAP</p> <p>Accreditation visit will be Fall of 2025 per NMPED</p> <p>Final TQP budget approved with carryover by DOE</p>
December	<p>Extender form creation developed and implemented to thoroughly track extensions needed in program for candidates struggling coach by coach</p> <p>Content coaching held for all candidates</p> <p>Set spring and fall calendar for remaining cohort and C6</p> <p>Redesign Application system, team, process, window</p> <p>Submit Literacy Assurances to PED for approval</p> <p>Submit 5 years of Completer Data to PED</p> <p>Travel prep for AACTE for team of 3 LEAP coaches</p> <p>Travel prep for Equity conference for team of 2 LEAP coaches</p> <p>Spring Retreat planning for Deans/Directors</p> <p>203 candidates</p>
90 Day Plan	<p>Need to determine feasibility of steering committee for National Accreditation/CAEP beginning this summer; Invoicing and pay options system in place with 7 candidates unpaid</p>
January	<p>Winter Retreat with ALD for Norming/Culture</p> <p>Development of Coaching Training with Elisa for Feb. 5</p> <p>Completer Data submission, again</p> <p>Santa Fe EPP Site Visit as Peer</p>

	Present at HR Conference Develop logistics and program for CES Alumni PD Conference Develop Coordinators for LEAP Into Action In-Person PD in Las Cruces and Alb. On 1/20 199 Candidates
February	
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90 Day Plan	
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90 Day Plan	

Leadership:

July	<p>Processed 94 applications for ALD program. Sent out approval letters, assigned classes to facilitators and participants, and finalized the 2023-24 ALD calendar. Added 2 classes to accommodate the increased number of participants. We have 50 Cohort 12 ALD candidates completing this semester and 84 Cohort 13 candidates beginning. Contacted first year superintendents regarding FYSA participation. Processed 22 applications for FYPA and finalized training calendar. Conducted two-day in-person initial training for FYPA. Finalized fall Leadership Series schedule and secured presenters. Presented Strategic Planning training session for NMSBA. Co-chaired the Principal Prep Workgroup for all administration preparation programs in NM.</p>
August	<p>Finalized calendar, organized and attended Executive Coach training. Contacted Executive Coaches and made assignments for coaching for FYSA, FYPA, and ALD. Organized Superintendent Mentor training. Developed and conducted Finance and Budget training for FYSA. Organized two-day in-person Instructional Coach Conference. Attended the PSCOOTF hearing in Santa Fe. Presented to school boards in Jal and Eunice regarding the CES 6-year Study. Co-chaired the Principal Prep Workgroup for all administration preparation programs in NM.</p>
September	<p>Developed and presented 5 regional Principal Learning Institutes (PLI) across the state. Finalized fall content and trained ALD facilitators. Taught SE NM ALD class in Lovington. Co-taught FYPA virtual session. Attended Executive Coach training. Organized two-day in-person Instructional Coach Conference #2. Facilitated two Leadership Series virtual sessions. Followed up with USW/ALD partnership. To date 18 of our ALD graduates have enrolled to begin their doctoral program at USW. Attended 6-year Study Advisory Committee meetings. Co-chaired the Principal Prep Workgroup for all administration preparation and completed recommendations to submit to LESC.</p>

90 Day Plan	Continue to support leaders at all stages of their administrative careers. Assist with planning and present at the CES Leadership Conference and NMAESP Principal Conference in October.
October	Met with State Representatives Joy Garratt and Ray Lara, LESC representatives, and the Greater Albuquerque Chamber of Commerce to present recommendations for updates for requirements for NM Principal Prep programs. Attended virtual follow-up sessions for the Instructional Coach Conference. Attended Executive Coach virtual training.
November	ALD application window opened. Attended 6-Year Study Advisory Committee meeting. Organized monthly Executive Coach training. Presented at NMSBA pre-conference for new board members (roles & responsibilities). Continuing training for FYPA with 23 principals. FYSA in-person training in Albuquerque. Participated in PSCOOTF hearing in Santa Fe. Planned for 6-Year Study subcommittee meetings. Taught Southeast ALD class. Conducted "Take Flight" training for Jal administrators.
December	Approved 58 ALD applicants for Cohort 14. Completed PED \$60,000 grant proposal for state-wide principal prep programs for coaching and mentoring--CES will be planning and implementing training for coaching and mentoring of aspiring school leaders. Participated in the NM Principal Residency Community of Practice for principal preparation programs. Facilitated Leadership Series and SPED SOS virtual training sessions. Participate in the 6-Year Study leadership sub-committee.
90 Day Plan	Continue to revise ALD modules. Planning for state-wide Coaching and Mentoring proposal for NMPED. Ongoing training for CES executive coaches.
January	Conducted 6-Year Study assessment and data sub-committee. Attended NM Principal Residency Community of Practice in Albuquerque and interviewed NM Principal Prep programs to gather data for state-wide coaching and mentoring training. PLI in Farmington (35 principals).
February	
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90 Day Plan	
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90 Day Plan	

TAP:

July	<p>Action Plan 1, Planning TAP presentations and other TAP supports (registration fliers, guidance article topics) for first semester 22-23. Vetting new presentations. New hire meeting for 3 new TAP Consultants.</p> <p>2a, requested presentations provided to ACES Charter, LEAP, Southwest Secondary Learning Center Charter</p> <p>Action Plan 1c, Consultants updating and re-recording webinars in the TAP Hot Topic on Demand Library</p>
August	<p>Action Plan 1, TAP provided 3 virtual presentations funded by NMPSIA, 1b, Sept. registration fliers distributed early Aug. 2nd, TAP monthly guidance articles started this month and posted in CES & Ancillary newsletters & CES website.</p> <p>2a, presentations provided to Hagerman (2 AM sessions), Horizon Academy West, Torrance County Children's Services in Moriarty. TAP evaluations shared with coordinator, presenters and David Chavez and Teresa Salazar</p> <p>Complimentary TAP consultation services provided to various districts mainly in behavior management strategies.</p>
September	<p>Action Plan 1, TAP provided 1 full day and 20 half-day presentations funded by NMPSIA. 1b. October registration fliers distributed early Sept. 1c. TAP added two new monthly guidance articles (total of 4 articles) to be posted on the website and newsletters to support educators. 2a. 2 full day presentations requested by Santa Fe Public Schools, presentation for CES Leadership Program on Special Ed. Compliance.</p> <p>Complimentary consultation services via phone and email continue to come in regarding specific issues districts are facing.</p>
90 Day Plan	<p>Continue to market and provide quality TAP services to include presentations, consultation services, guidance articles and updated webinar recordings in the TAP library to educators in the state.</p>
October	<p>Action Plan 1, TAP provided 1 full day and 18 half-day presentations funded by NMPSIA. 1b. Dec. registration fliers distributed Nov. 8th, 1c Monthly guidance articles (4 total) continue to be posted on the CES website and newsletters.</p> <p>2a. 2 presentations at Buffalo Thunder for REC 2 Leadership Academy, 2 presentations for CES Leadership Conference at Embassy Suites, 2 presentations for a Los Lunas PD-day, Special Education SOS Compliance presentation to CES Leadership</p> <p>TAP Hot Topic Webinar Library continues to grow from recorded presentation monthly.</p>
November	<p>Action Plan 1, TAP provided 3 full day and 12 half day presentations funded by NMPSIA. 1b. Dec. registration fliers distributed early Nov., 1c. Monthly guidance articles (4 total) posted on CES website and newsletters. 2a. TAP presented half-day in West Las Vegas, all day at Colfax / Mora Head Start Program, all day in Los Lunas</p> <p>Recorded webinar "Hot Topic Library" continues to grow and is heavily utilized by viewers unable to attend live virtual presentations.</p>
December	<p>Action plan 1, TAP provided 1 full day and 5 half day presentations funded by NMPSIA to finish off the first semester. 1b. Jan. registration fliers distributed in early Dec., 1c. monthly guidance articles submitted for January publication posted on the website, CES and Ancillary newsletters. 2a. Special Education SOS Compliance presentation to CES Leadership. TAP evaluations continue to be shared with the presenters, David Chavez and Teresa Salazar. TAP held an end of the semester planning luncheon this month to introduce a new consultant, plan and schedule presentations for the remainder of the school year.</p>
90 Day Plan	<p>TAP is on track regarding the 23-24 Strategic Plan. TAP will continue to provide complimentary presentations funded by NMPSIA, submit 4 monthly guidance articles, and</p>

	<p>keep adding recordings to the "TAP Hot Topic on Demand Library". TAP continues to provide quotes, consultation services and quality professional presentations upon request.</p> <p>First semester of 2023 TAP provided 70 interactive presentations funded by NMPSIA, 18 presentations requested by districts on specific request topics and 5 presentations to CES LEAP and Leadership Programs. Total attendance for first semester 2,960.</p>
January	<p>Action Plan 1, TAP provided 7 presentations, 1 full day, 6 half day funded by NMPSIA.</p> <p>1b. Feb. registration flyers distributed in early Jan.; monthly guidance articles submitted for Feb. publication. 2a. TAP presented 2 days at Horizon West Charter School, 1 day at Cesar Chavez Charter, 1 day at Los Lunas Public Schools, SOS Compliance presentation provided to CES Leadership. Recorded webinars continue to be added to the TAP library.</p>
February	<p>Action Plan 1, TAP provided 12 presentations, 3 full day, 9 half day funded by NMPSIA.</p> <p>1b. March registration flyers distributed in early Feb.; monthly guidance articles submitted for March publication. 2a. TAP presented twice for Las Cruces Public Schools on different topics, SOS Compliance presentation to CES Leadership. Met with POM's Risk Management staff to discuss IDEA Discipline Rules.</p> <p>Recorded webinars continue to be recorded and added to the TAP Library.</p>
March	Action Plan 1,
90 Day Plan	
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90 Day Plan	

SITE:

July	Action Plan 1 (Increase the number of SITE Districts): Set up plans with 20 districts renewing MOAs in the areas of New Teacher Development, Conceptual Math Applications, Engagement Strategies, Using AI to help create Lessons, UDL, Cultural and Linguistic Responsiveness, Project based learning, and Sheltered Instructional Strategies. Action Plan 3 (Improve coordinated and comprehensive training of SITE consultants): New Teacher Collaboration and Professional Development with SITE consultants.
August	Action Plan 1 (Increase the number of SITE Districts): New SITE districts include Cimarron, Cobre, Hagerman, Holy Ghost, Jemez Mountain, Pecos, Albuquerque Aviation, and Pojoaque. Action Plan 3 (Improve coordinated and comprehensive training of SITE consultants): Joint training with LEAP on the "Foundations of Coaching" with Elisa Begueria
September	Action Plan 2 (Strengthen accountability measures used to determine progress towards district/school goals.) Partnership with PED on standards alignment with NAEP and coaching support for NAEP districts to raise reading and math scores on the National Assessment with additional support in the area of NMSSA alignment.
90 Day Plan	1. Continue to complete implementation of MOAs with the goal of 40 total districts. 2. Continuous improvement of district support in training and coaching. 3. Collect and analyze short cycle assessments in districts for the first 90 days.
October	Action Plan 1 (Increase the number of SITE Districts): New districts include St. Mary's, West Las Vegas, Central Consolidated, Tower Road Baptist, and Vaughn. Action Plan 2 (Strengthen accountability measures used to determine progress towards district/school goals.): SITE consultants completed a crosswalk between the NAEP assessment and the New Mexico Math and Reading Standards. CES SITE partnered with PED to create the first NAEP rally and Academy to create awareness of the importance of the Nation's Report Card in Math and Reading rankings.
November	Action Plan 1 (Increase the number of SITE Districts): New districts include Sandoval Academy of Bilingual Education. Action Plan 1a (Create new marketing material to target districts across the state): Completed Marketing Video interviews with Aaron Gonzales on SITE.
December	Action Plan 2 (Strengthen accountability measures used to determine progress towards district/school goals.) Worked with SITE Consultants on creating Virtual Presentations for NAEP participants in New Mexico. Team meetings with SITE consultants on Math and Reading best strategies for classroom instruction to improve student achievement on state and national assessments.
90 Day Plan	1. Continue to complete implementation of MOAs with the goal of 40 total districts. 2. Continuous improvement of district support in training and coaching. 3. Collect and analyze short cycle assessments in districts for the mid-year.
January	Action Plan 1 (Increase the number of SITE Districts): New districts include Raton and Chama Valley Action Plan 2 (Strengthen accountability measures used to determine progress towards district/school goals.): SITE consultants conducted virtual NAEP Prep sessions with teachers across New Mexico in Math and Reading.
February	Action Plan 3 (Improve coordinated and comprehensive training of SITE consultants): SITE partnered with LEAP to provide "Part Two of Foundations of Coaching" with Elisa Begueria.
March	

90 Day Plan	
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90 Day Plan	

Professional Development:

July	<p>1a. Scope of work was developed for the 6-year study.</p> <p>3b. CES Executive Committee approved \$740,000 budget.</p> <p>7a. Advertised and interviewed candidates. CES was unable to find a match for this position. Contracted with a professional services provider.</p>
August	<p>1b. RfP was released, and 6 vendors submitted.</p> <p>1c and d. Contracts were evaluated and awarded to all vendors. AAIS will do year 1 work with all districts participating.</p> <p>2 a-c. 18 schools were identified as potential participants. MOUs were entered into by 11 districts and CES.</p> <p>3a. Initial Advisory meeting took place on 8/16, with 23 members attending.</p> <p>4a-d. Quality control for year one will be addressed by CES staff as AAIS will be the sole vendor for year one.</p> <p>7b-c. Grant was submitted to Thornburg Foundation to support 6-yr Study. Presentation was made to Permian Strategic Partners to acquire funding for districts in the study to support initiative.</p>
September	<p>2c. MOUs were entered into by 3 additional districts and CES. Currently waiting on one more district.</p> <p>3a. Individual meetings occurred with foundations. CES applied for initial funding from Thornburg Foundation and Permian Strategic Partner. Foundations cycles usually start in Jan., and CES will be applying.</p> <p>5a. Survey sent to participating districts to provide basic information for CES & vendor.</p> <p>5b. All entrance meetings for the 16 districts took place virtually and on-site visits were scheduled.</p>
90 Day Plan	<p>Continue monitoring and supporting the initial steps of the 6-yr study.</p> <p>Identify options to elevate student learning through comprehensive math professional development.</p>
October	<p>7b-c. Thornburg Foundation award was granted for \$50,000 for this application cycle. CES did not receive the PSP grant.</p> <p>Initial work on a math initiative for participating districts has started.</p>
November	<p>*All 16 school districts in the study have had a site visit from AAIS. Districts are working to provide AAIS with requested documents.</p> <p>*Another request has been made to PED for data requested on the 16 districts.</p> <p>*Dec. 4th will be the next advisory committee meeting. Dr. Tenett Smith from the Mississippi Dept. Of Educ. Will be presenting on their improvement journey.</p> <p>*A presentation to a group of potential funders was given in Santa Fe on Nov.14</p>
December	<p>*Dr. Smith shared work and experiences that moved Mississippi from 50th to 34th.</p> <p>*Sub-committees all participated in their initial meeting.</p> <p>*Dates for Advisory and Sub-committee meetings have been identified and sent through June.</p> <p>*Tasks have been identified for David, Teresa, LeAnne, and Evan to complete before Jan.</p> <p>*AAIS will provide a proposal for the improvement in math.</p> <p>* Next Six-Year Study Advisory meeting January 29th @ 10:00 a.m. Dr. Kraegan</p>
90 Day Plan	<p>* Set meeting with participating Superintendents and their Board President.</p>

	<ul style="list-style-type: none"> * Audit reports shared with participating school districts * Strategic plans will be developed during the months of February through April. * Sub-Committee work will continue to focus on how to support participating schools * Mathematics proposal * Develop budget for 2024-2025 * Build professional development cadre to support school districts
January	<ul style="list-style-type: none"> *Sub-committees meet. Admin survey was developed and distributed to determine PD needs for leadership in districts *Advisory Council meet to hear overview of AAIS findings *Proposals were provided from AAIS to do work in math
February	<ul style="list-style-type: none"> * Proposals were provided from Dana Center to do work in math *Draft audits were provided to districts to finalize any documents that needed to be submitted *Community meetings and strategic planning is being scheduled for March-May
March	
90 Day Plan	
April	
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June	
90 Day Plan	

Northern Services:

July	<p>Regional Travel and annual NMCEL are highlights pending this month. Travel included Region 4 and Region 5, primarily. Continued Support for Utilizing Bluebook for informational purposes for requisitioning purchases, obtaining contracts and other vendor information (including pricing), and uploading or transmitting Purchase Orders via the various purchasing options available.</p> <p>NMREAP is in full “renewal mode” and the majority of current subscriptions are renewing and have submitted PO’s. Summer is generally a little busier with calls from Subscribers and applicants looking for assistance in access and utilization.</p>
August	<p>August was a busy travel month. I spent a large amount of time in the northern half of Region 1 with two different trips there. One was for the NM Municipal League and the other was for entity visits and regional meeting. Also had the Region 2 meeting, as well, in Jemez Mountain. I traveled into Region 2 and spent time in entities in the Taos/Questa/Red River/etc... area.</p> <p>NMREAP invoices are trickling in and school is starting. Most positions that can be filled have been filled!</p>
September	<p>September/October is “Directory Month”. I have started the annual update process of over 350 members/entities in the north. Each received individualized notices with their contacts listed from the directory. I received an overwhelming response (best ever) in the first round of update notices and have been tackling getting these input into the directory. Round two will start with the remaining 150 or so.</p>
90 Day Plan	<p>Things are going well with regional travel. I did not hit the “southern” portion (Gallup/Zuni) of Region 1 this last quarter, so it will be priority in early October. As posted throughout the quarter, continued fielding of calls/emails for assistance along with scheduled in-person trainings and meetings is the primary focus.</p> <p>The entire staff has begun a three-part “Customer Service” training to better work with and for our members and to increase in-house efficiencies for that service.</p>

October	<p>The Facilities Manager workshop was the “highlight” for October. It is always a great opportunity to catch up with facilities managers and is a great vendor show. Also, the superintendent meetings, in conjunction, allow for opportunity to make contact with district leadership.</p> <p>The infrastructure conference, this year in Las Cruces, followed the Facilities Manager Workshops. Jim and I were able to make some good contacts with county and municipal facilities folks. In addition to these conferences, regional travel and visiting members/entities was conducted.</p>
November	Highlights for this month was traveling and delivering Member Service Credits.
December	<p>December is usually a “wind-down” month in terms of traveling, but is continued with business on the purchasing front. Activity in assisting members with bluebook has been busy.</p> <p>Also wrapped up updating of 270/320 northern entity contact listings. Will pursue the remaining 50 after the new year.</p>
90 Day Plan	
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90 Day Plan	
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90 Day Plan	

Southern Services:

July	Conducted on-site visits to members in Region 8 (Las Cruces area). Ran a booth at the Procurement and Contracting Symposium (hosted by Texas equivalent of PTAC) in order to recruit additional vendors and PEs. Continued to supply help and training as needed to entities' personnel needing access to the Bluebook and contracts. Continued updates to Member Directory. Along with regular social media posting, developed a draft video script for Procurement Department review - "Becoming a CES Procurement Partner and Contract Holder," using AI (Artificial Intelligence) to help convert bulleted talking points into flowing script. Published July 2023 Member Newsletter. 15 mass emails also sent for marketing and information sharing.
August	Conducted on-site visits to members in Region 8 (Las Cruces, Gadsden, Hatch, T or C, and Deming areas). Manned booth at NM Municipal League conference in Farmington. Continued to supply help and training as needed to entities' personnel needing access to the Bluebook and contracts, plus a new emphasis on specific purchasing support for CES business office. Continued updates to Member Directory. Maintained regular social media posting. Used AI (Artificial Intelligence) to produce improved verbiage for articles and plan outlines. Published August 2023 Member and Vendor Newsletters. 22 mass emails also sent for marketing and information sharing.
September	Conducted on-site visits to members in Region 8 (Animas & Lordsburg areas). Participated in eProcurement planning session with other CES leadership. Assisted PE as a member of their employment interview panel. Attended regional CES meetings in Cloudcroft and Gadsden. Attended regional NMSBA meetings in Lovington and Deming. Continued to supply help and training as needed to entities' personnel needing access to the Bluebook and contracts, plus specific purchasing support for CES business office. Continued updates to Member Directory. Prepared for solicitation of contact information updates from all southern members and PEs. Maintained regular social media posting and worked toward production of various print and video media. Used AI (Artificial Intelligence) to produce improved verbiage for articles and plan outlines. Published September 2023 Member Newsletter. 21 mass emails also sent for marketing and information sharing. Explored and studied method of producing reels for use in social media.
90 Day Plan	<ol style="list-style-type: none">1. Complete visits in Region 8.2. Make site visits to <i>CEO & Purchasing contacts only</i>, Regions 6, 7, 8, & 4S.3. Complete production of video "Becoming a CES Procurement Partner and Contract Holder."

	<p>4. Complete recorded interviewing with Professional Development leadership for use in videos for each program and a compilation video.</p> <p>5. Explore use of AI in graphics production.</p>
October	<p>Conducted on-site visits to members in Region 8 (Silver City). Made presentation to Lincoln County Homebuilders Assn (effort to recruit vendors in region). Worked the CES Facilities Managers Workshop. Ran a booth at the NM Infrastructure Conference and at the NM Public Procurement Association Conference. Attended the regional CES meeting in Carlsbad. Attended a regional NMSBA meeting in Gadsden. Continued to supply help and training as needed to entities' personnel needing access to the Bluebook and contracts, plus specific purchasing support for CES business office. Continued updates to Member Directory. Distributed a request for contact information updates from all southern members and PEs. Maintained regular social media posting and worked toward production of various print and video media. Continued work on "Becoming a CES Procurement Partner and Contract Holder" video and began work on interview-based videos of Professional Development program coordinators. Used AI to produce improved verbiage for articles and plan outlines. Published October 2023 Member Newsletter. 16 mass emails also sent for marketing and information sharing. Tinkered with production of a relevant image using AI.</p>
November	<p>Visited members in Region 8 (Silver City, Cobre, Reserve). Ran a booth at the NM Safe Schools Summit and at the Public Charter Schools of NM Conference. Continued to supply help and training as needed to members' personnel regarding access to Bluebook and contracts and assistance with services delivery by vendors and invoicing/payment situations. Continued updates to Member Directory, with many changes collected through a RFI sent to members. Maintained regular social media postings and continued production work for "Becoming a CES Procurement Partner and Contract Holder" video and Professional Development program coordinator recorded interviews. AI was used to produce improved wording in articles and messages. Published November 2023 Member Newsletter. 18 mass emails also sent for marketing and information sharing.</p>
December	<p>Visited members in all of Region 6 plus Ruidoso Downs, Cloudcroft, Tularosa, and Alamogordo. Ran a booth at the NMSBA Annual Convention and at the Texas Tech University Health Science Center's Vendor HUB event (El Paso). Continued to supply assistance and training as needed to members' personnel regarding access to Bluebook and contracts, assistance with services delivery by vendors, and invoicing/payment situations. Sent a second RFI for contact updates to nonresponding members. Continued updates to Member Directory, with many changes collected through the RFIs sent. Maintained regular social media postings. Completed production of "Becoming a CES Procurement Partner and Contract Holder" video and Professional Development program</p>

	<p>coordinator recorded interviews. Scheduled a full year of clips from the PD interviews being posted to social media. AI was used to produce improved wording in articles and messages. Published December 2023 Member Newsletter. 5 mass emails were sent for marketing and information sharing.</p>
90 Day Plan	<ol style="list-style-type: none"> 1. Complete cycle of non-drilled visits to members, composed of Regions 7 & 8 & 4S. 2. Begin regular cycle of drilled-down visits to members, beginning with Region 6. 3. Participate in production of media/materials to support new marketing plan currently in development. 4. Explore use of AI for image production in support of graphics media projects.
January	<p>Visited members in Regions 7 & 8 & 4S. Ran a booth at the NM Counties Legislative Conference. Continued to supply assistance and training as needed to members' personnel regarding access to Bluebook and contracts, assistance with services delivery by vendors, and invoicing/payment situations. Continued updates to Member Directory, largely based upon RFI responses. Maintained regular social media postings. Published January 2024 Member and Vendor Newsletters. 25 mass emails were sent for marketing and information sharing.</p>
February	<p>Visited members in Region 6. Ran booths at the NM School Board Institute, NM ASBO Winter Conference, and the NM APEX Governmental Contracting Expo. Continued to supply assistance and training as needed to members' personnel regarding access to Bluebook and contracts, and invoicing/payment situations. Continued updates to Member Directory. Maintained regular social media postings. Published video: "What's Included in the Bluebook?" Published February 2024 Member Newsletter. 23 mass emails were sent for marketing and information sharing.</p>
March	<p>Visited members in Region 6. Ran a booth at the NM ASBO/PED Budget Conference. Continued to supply assistance and training as needed to members' personnel regarding access to Bluebook and contracts, assistance with services delivery by vendors, and invoicing/payment situations. Continued updates to Member Directory. Maintained regular social media postings. Continued work on a video project for orientation of awarded vendors. Published March 2024 Member Newsletter. ** mass emails were sent for marketing and information sharing. Practiced creation of images using AI, and planned for use of the tool in media production aspects.</p>
90 Day Plan	
April	
May	

June	
90 Day Plan	