

**Date:** June 23, 2021

**Prepared By:** Simon

**Witness:** Joseph Simon, LESC staff; **John Sena**, Public Education Department; **Dennis Roch**, Logan Municipal Schools; **Danny Parker**, Artesia Public Schools

## Reducing Administrative Burden of School District and Charter School Reporting Requirements

---

### Reporting Requirements in the Public School Code

- The Public School Code includes 121 separate reporting requirements for school districts, charter schools, the Public Education Department (PED) and other entities involved with education in New Mexico, including the Educational Retirement Board, Public School Facilities Authority, Public Schools Insurance Authority, teacher preparation programs, regional education cooperatives, the Higher Education Department, and LESC.
- What is a reporting requirement:
  - A requirement to provide another entity data or information at a particular time or under particular circumstances.
- What is not included in reporting requirements:
  - A requirement to take a particular action, develop and adopt a policy, or create a new program.
  - A rulemaking requirement.
  - A requirement to hold a public meeting.
- In 2017, the Martin Consulting Group conducted a review of New Mexico's public school reporting requirements and recommended the elimination of six statutory reports.
- Since that time, the Public School Code has been amended to add and repeal reporting requirements. The Legislature has added 26 new reporting requirements, in some cases replacing old requirements, while 14 reporting requirements have been repealed.
  - Repeals include five of the six reports recommended for elimination. The Legislature declined to eliminate required reporting for at-risk program units.

## Types of Reporting Requirements

- In general, staff have identified three broad categories for reporting requirements.
  - **Compliance** requirements are designed to ensure a particular law or policy is being followed or to enable an agency to perform a particular function.
    - *Example:* The Public School Finance Act requires school districts and charter schools to report to PED on the number of students enrolled on a particular day. This enables the department to accurately calculate the state equalization guarantee distribution.
    - *Example:* The School Personnel Act requires school districts to report on the size and composition of classes, enabling PED to determine if the school district or charter school is meeting the class size requirements outlined in state law.
  - **Financial transparency** requirements are designed to promote the prudent use of public money and to provide stakeholders and the public with information on how public schools, PED, and other entities use public monies.
    - *Example:* The Assessment and Accountability Act requires a school district's or charter school's report card to include data on central office administrative expenses.
    - *Example:* The Public School Finance Act requires PED to set up an online statewide financial reporting system, updated at least annually, that enables the public to compare the expenditures at different school sites.
  - **Program performance** requirements enable PED, the Legislature, and other stakeholders to evaluate programs required or authorized by the Public School Code to determine if current laws are effective in meeting the needs of students or improving student outcomes.
    - *Example:* The Bilingual Multicultural Education Act requires PED to report to the Legislature each year on achievement and language proficiency data for bilingual students and to evaluate bilingual multicultural education program effectiveness.

- *Example:* The secretary of PED is required to provide an annual evaluation to LESC and the governor on the success of the next-step plans for high school graduation.
- Staff review found 61 compliance reports, 31 financial transparency reports and 55 program performance reports, although some reporting requirements fit into multiple categories.

## Considerations

- Each type of reporting requirement serves an important purpose, but each required report creates an administrative burden on PED, a local school district or charter school, or other educational stakeholder. It is up to the Legislature to balance the need for information with the ability of the reporting entity to provide the information.
  - *Does the report provide useful information to policymakers or the public?* Policymakers at the state and local level need to develop educational programs that meet the needs of students and improve student outcomes. This requires a process of planning, monitoring, and evaluating. Reporting requirements can help to identify areas of consideration in this process, but if not frequently reviewed and kept up-to-date, the proliferation of requirements can serve as a distraction and dilute the overall value of the process.
  - *What staff are required to complete the report?* Education policymakers have highlighted the need for additional resources to be directed to classroom activities, but administrative reporting requires entities to pour more resources into administration. In addition, PED currently operates with fewer personnel than before the Great Recession and the addition of reporting requirements places an administrative burden on the department not only to collect the data but to ensure that what is collected is useful.
  - *How often should the report be completed?* In general, the law requires most of the reports to be completed annually, but it may be possible for some reports to be completed less frequently. Less frequent reporting could allow for a more detailed evaluation of program effectiveness.