

**STATE OF NEW MEXICO**  
**LEGISLATIVE EDUCATION STUDY COMMITTEE**

**REPRESENTATIVES**

Rick Miera, Chair  
Nora Espinoza  
Mary Helen Garcia  
Jimmie C. Hall  
Dennis J. Roch  
Mimi Stewart

State Capitol North, 325 Don Gaspar, Suite 200  
Santa Fe, New Mexico 87501  
Phone: (505) 986-4591 Fax: (505) 986-4338  
<http://www.nmlegis.gov/lcs/lesc/lescdefault.aspx>

**SENATORS**

Cynthia Nava, Vice Chair  
Mary Jane M. García  
Gay G. Kernan  
Lynda M. Lovejoy

**ADVISORY**

Alonzo Baldonado  
Ray Begaye  
Eleanor Chávez  
George Dodge, Jr.  
Roberto “Bobby” J. Gonzales  
Tim D. Lewis  
Sheryl M. Williams Stapleton  
Shirley A. Tyler  
Bob Wooley



**ADVISORY**

Vernon D. Asbill  
Mark Boitano  
Stephen H. Fischmann  
Howie C. Morales  
John Pinto  
Sander Rue

Frances Ramírez-Maestas, Director  
David Harrell, PhD, Deputy Director

July 25, 2011

**MEMORANDUM**

**TO:** Legislative Education Study Committee

**FR:** David Harrell

**RE: UPDATES: PUBLIC EDUCATION DEPARTMENT (PED): PED ADVISORY TEAM DELIVERABLES**

---

**Introduction**

On February 9, 2011, the Public Education Department (PED) issued a news release (see Attachment 1) announcing the appointment by Secretary-designate of Public Education Hanna Skandera of a nine-member advisory team, comprising “experts from across the country with extensive experience in education policy, management and administrative issues.” The news release further states that the charge to this “team of leaders” was to make recommendations to the Secretary-designate on short-term and long-term strategies “for making the Public Education Department more efficient and effective to better serve New Mexico’s students, schools, teachers and parents”; and that the department had contracted with these experts “as an alternative to the immediate hiring of many of the Department’s exempt positions, resulting in a cost-savings to the State of New Mexico . . . .”

This staff report to the Legislative Education Study Committee (LESC) reviews:

- the team members and their assignments;
- the work of the advisory team; and
- some of the professional affiliations of team members.

**Team Members and Their Assignments**

The news release noted above provides the name, the advisory role, and a brief account of the experience and credentials of each of the nine members of the PED Advisory Team. Judging

from the news release and the respective websites of team members or companies, four of the nine are based in Florida; two in Washington, DC; and one each in California, Tennessee, and Texas. Listed below are the team members' particular advisory assignments as indicated by the news release:

- Catherine Freeman, PhD: “operational functions and education policy, including management, organizational structure and corresponding budget and legislative issues”;
- Christy Hovanetz, PhD: “a wide range of education reform policy issues, including assessment and accountability initiatives”;
- Jay Pfeiffer: “data quality issues, including measures to upgrade and improve” the state’s Student Teacher Accountability Reporting System (STARS);
- David Saba: “education policy issues relating to teacher effectiveness, certification and licensure”;
- Jeff Sellers: “a wide range of education policy and data quality issues”;
- John Bailey: “a wide range of education policy and technology issues”;
- Terrell Halaska: “a wide range of education policy and organizational issues”;
- Kristy Campbell: “communications, legislative and public engagement strategies”; and
- Chad Colby: “education policy, federal compliance and communications issues.”

Although the news release says that PED “has contracted with these [nine] experts,” an LESC staff search of the New Mexico Sunshine Portal and a list compiled by the Department of Finance and Administration (DFA) found only three contracts in place. In addition, a search by the Contracts Review Bureau at DFA was unable to produce any other contracts with members of the PED Advisory Team. The contracts listed by both the Sunshine Portal and DFA are with Mr. Colby, Ms. Campbell, and a company called HCM Strategists. The contract with HCM Strategists is signed by Catherine Freeman, but it may also include Terrell Halaska (see “Professional Affiliations of Team Members,” below). As this report was being completed, an LESC staff query to PED about the status of the contracts with the other team members had gone unanswered.

### **Work of the Advisory Team**

First in May 2011 and then again in July 2011, LESC staff posed a number of questions to the department about the work of the PED Advisory Team, the implementation of any recommendations the team members may have made, and the amount of cost-savings to the state (see Attachment 2). As of this writing, those questions remain unanswered. Presumably, however, the Secretary-designate will address outstanding questions during her part of this presentation to the LESC. In the meantime, further indications of the work of the advisory team can be discerned from the three contracts that are on file.

The contracts for Kristy Campbell and Chad Colby prescribe the same scope of work, including identical performance measures. In each case, the contractor “shall perform the following work:

1. Provide ongoing technical assistance to the Agency Secretary and Agency staff as requested by the Agency Secretary upon DFA approval . . . with the following objectives:

- a. Conduct organization reviews and provide recommendations related to efficiency and effectiveness in areas related to communications, parent, teacher and public outreach and education policy.
- b. Identify strategic workforce needs and assist in identifying candidates for key leadership positions.
- c. Provide leadership and training for successful implementation of strategic planning in the communications and executive offices.
- d. Identify partners who can augment or accelerate New Mexico's education efforts and initiative and increase community engagement.
- e. Assist in the development of and the launch of key policy initiatives."

The contracts also provide that the services will be performed "with internal and external stakeholders" as requested by the Secretary; that joint meetings with the Secretary and the contractor "will be scheduled in New Mexico"; and that the contractors must provide weekly progress reports to the Secretary regarding performance measures.

In terms of performance measures, the two contracts require the contractors to "substantially perform" the following tasks:

- upon request, provide technical assistance to the Secretary and selected NMPED staff in order to develop short-term and long-term strategies for successful implementation of parent, teacher, and community outreach initiatives;
- provide an analysis and short-term and long-term strategies for improving community engagement and external communications with education stakeholders; and
- provide an analysis and plan for identifying resources to develop, communicate, implement and sustain education policy initiatives.

Finally, both contracts terminate on June 30, 2011.

Beyond these identical features, however, there are three differences between the two contracts:

- the technical assistance period for Mr. Colby is through March 31, 2011; and that for Ms. Campbell is through April 30, 2011 (see the ellipsis in Number 1, above);
- Mr. Colby's final report was due on March 31 and Ms. Campbell's on April 30; and
- the maximum amount of Mr. Colby's contract is \$15,146.25, including gross receipts tax and expenses; and the maximum of Ms. Campbell's is \$34,000.

The scope of work in the contract with HCM Strategists includes some of the same activities as the contracts with Mr. Colby and Ms. Campbell, as well as three other activities:

- conduct organization reviews and provide recommendations related to efficiency and effectiveness throughout the agency;
- provide policy guidance on legislative proposals; and
- identify cost-savings of both federal and local funding across PED.

The performance measures are similar to those in the Colby and Campbell contracts, with one notable variation: HCM Strategists is to provide an analysis of PED's organizational structure "to support and sustain the Secretary's policy initiatives."

Finally, in the HCM Strategists contract:

- the scope of work period extends through March 31, 2011;
- a final report was due March 30;
- the agreement was to have terminated on March 31; and
- the maximum amount payable, including gross receipts tax and expenses, is \$37,865.63.

### **Professional Affiliations of Team Members**

As the February news release and a variety of other sources indicate, all nine team members have had or still have overlapping professional affiliations. A detailed analysis of these affiliations is beyond the scope of this staff report; however, the brief accounts that follow may illustrate the point.

To begin, five of the nine served under Jeb Bush when he was Governor of Florida; three others worked in the US Department of Education under the administration of George W. Bush; and two recently worked in gubernatorial election campaigns in Florida. In addition, most of the nine members have had primary employers in common with other members.

#### ***HCM Strategists, LLC***

Described as “a public policy and advocacy consulting firm,” HCM Strategists, LLC says that the company helps clients in businesses, public agencies, and nonprofit organizations transform ideas “into effective policy at the local, state, and federal levels.” The company’s clients include the Bill and Melinda Gates Foundation, the College Board, the Friends of Choice in Urban Schools, the Lumina Foundation for Education, the Western Interstate Commission for Higher Education, and the New Mexico PED.

Two members of the PED Advisory Team are affiliated with HCM Strategists:

- Terrell Halaska is a founding partner, leading the company’s work with the College Board’s Center for Advocacy and Policy and with the Gates Foundation; and
- Catherine E. Freeman, PhD, is a senior associate. Her work for HCM Strategists involves “policy and politics in local, state, and federal K-12 education systems, at the university level, and in the nonprofit sector.”

#### ***Foundation for Excellence in Education***

Founded by Jeb Bush, former Governor of Florida, who serves as President and Chairman of the Board, the Foundation for Excellence in Education is a 501(c) 3 not-for-profit charitable organization. The foundation describes its mission as “to ignite a movement of reform, state by state, to transform education for the 21<sup>st</sup> century.” Furthermore, the foundation envisions “an education system that ensures each and every student achieves his or her God-given potential for learning and prepares all students for success in the 21<sup>st</sup> century.” Among the components of the foundation’s reform agenda are:

- high expectations and rigorous academic standards;
- standardized measurement;

- outcome-based funding;
- school choice; and
- “disruptive innovation,” through which technology creates a customized education for each student “so that all students can achieve their full potential for learning.”

The foundation’s website profiles a number of education reformers. Among them are Dr. Matthew Ladner, who made a presentation to the LESC during the 2010 interim on the effects of educational reforms in Florida; and two members of the PED Advisory Team: Mr. Dave Saba (see below) and Dr. Christy Hovanetz, a senior policy fellow at the foundation who served in a variety of capacities under Jeb Bush when he was Governor of Florida.

Another initiative that the Foundation for Excellence in Education supports is the Chiefs for Change, which the foundation describes as “a coalition of state school chiefs and leaders that share a zeal for education reform.” According to the Chiefs for Change, the mission of the group “is to bring about bold, visionary education reform with a laser-like focus on improving academic achievement, closing gaps between groups, and preparing all of our students for success in college and careers.” Membership of the Chiefs for Change comprises commissioners, superintendents, and secretaries of education from a number of states, including the Secretary-designate of Public Education in New Mexico.

### ***DWSaba Consulting, LLC***

According to its website, DWSaba Consulting, LLC, specializes in company turn-arounds, education start-ups, online development, branding and positioning, and legislative strategies, among other endeavors. “For the past 27 years,” says Dave Saba, the founder, “I have turned around poorly performing organizations through energetic leadership, key relationships, and intuitive problem solving skills,” with “a track record of proven results that spans across several industries and capabilities.” The website further identifies several specific areas of expertise. Educational areas include teacher training and certification, charter school boards, test preparation, and college marketing.

Among the company’s clients listed on its website are VirtualEDU, a K-12 online education provider, and Secretary-designate Skandera. About Ms. Skandera, the website says: “Working on education reform in New Mexico with one of the brightest stars in Education who recently took over as Secretary of Education. Focus on the Educator Quality and working with the team in place to find ways to improve teaching for all New Mexico’s students.”

### ***Whiteboard Advisors***

Whiteboard Advisors describes itself as “a policy-oriented consulting practice” and as “the non-lobbying arm” of Dutko Worldwide, a bipartisan government affairs strategy and management firm that provides subject-matter experts to clients in 40 countries. Its website says that the company provides “proprietary research and strategic support to investors and philanthropic donors, government leaders and entrepreneurs that seek unparalleled understanding of the education policy and business environment.” The website also highlights the customized research that the company offers its clients, citing as one example policy research “to help inform an organization’s growth strategy and identify the barriers to specific models of education, such as online schools or competency-based approaches to education.”

Serving as director of Whiteboard Advisors and as co-publisher of the journal *Education Insider* is another member of the PED Advisory Team, John Bailey. According to the company's website, Mr. Bailey has worked on education policy at the state and federal level, holding a number of positions in the Bush administration; and he has worked with the Gates Foundation.

***MPR Associates, Inc.***

Founded in 1981, MPR Associates, Inc. describes itself as “a research and consulting firm that specializes in education.” The website emphasizes the company's “rich content expertise in K-12 education, particularly in today's most urgent issues.” Key focus areas include student achievement and the achievement gap, STEM (science, technology, engineering, and math) education, and the use of data to improve schools. Among its clients, the company lists numerous nonprofits and businesses, including the Southern Regional Education Board and the National Board for Professional Teaching Standards; several foundations, including the Lumina Foundation and the Broad Foundation; and numerous state education departments, including New Mexico's PED and the former New Mexico State Department of Education.

Serving as the Director of State Longitudinal Data Systems of MPR is Jay Pfeiffer, another member of the PED Advisory Team. Among his areas of data expertise, Mr. Pfeiffer lists planning, designing, and implementing data systems linking P-20, postsecondary, and workforce data; and advising local, state, and national projects related to longitudinal data systems. Mr. Pfeiffer also cites expertise in developing practical data applications for accountability and performance reporting, funding applications, licensure, accreditation, counseling, and other purposes

***Laying the Foundation, Inc.***

Headquartered in Dallas, Texas, Laying the Foundation, Inc. describes itself as “a non-profit organization dedicated to providing quality teacher training, rigorous classroom materials, and web-based resources to improve the quality of English, mathematics, and science instruction. LTF believes that training, mentoring, and empowering the teacher corps will lead to high standards of academic excellence for all students.” The website says that LTF is training thousands of teachers in Texas and nine other states: Alabama, Arkansas, Connecticut, Florida, Kentucky, Massachusetts, Oklahoma, South Dakota, and Virginia. Another website, however, adds two more states to the list: Louisiana and New Jersey.

From September 2010 to December 2010, Ms. Hanna Skandera served as the Chief Executive Officer of LTF. During those four months, according to a press release by the organization, Ms. Skandera focused on “honing [the foundation's] strategy in emerging as one of the nation's foremost teacher training programs.” After Ms. Skandera resigned in December 2010 to assume the role of Secretary-designate of Public Education in New Mexico, she was succeeded by Mr. David Saba, a member of the PED Advisory Team, who assumed office in early April 2011. Speaking of LTF in general, Dr. Christy Hovanetz, another member of the PED Advisory Team, said that LTF “continues to build and develop strategic partnerships while solidifying the core principles of effective teacher training.”



Hanna Skandera  
Secretary of Education

**New Mexico**  
**Public Education Department**  
300 Don Gaspar  
Santa Fe, New Mexico 87501-2786  
[www.ped.state.nm.us](http://www.ped.state.nm.us)

Beverly Friedman  
Public Information Officer  
505-827-6661  
[Bev.Friedman@state.nm.us](mailto:Bev.Friedman@state.nm.us)

# NEWS RELEASE

For Immediate Release: February 9, 2011

## **Education Secretary-Designate Skandera Announces PED Advisory Team**

*Experts Bring Wealth of Education Experience at a Cost Savings to the State*

**SANTA FE, NM** – New Mexico Public Education Secretary-designate Hanna Skandera today announced the Public Education Department’s Advisory Team, which includes experts from across the country with extensive experience in education policy, management and administrative issues. This team of leaders is charged with making recommendations to Secretary-designate Skandera on short-term and long-term strategies for making the Public Education Department more efficient and effective to better serve New Mexico’s students, schools, teachers and parents.

“Under Governor Martinez’s leadership, the Public Education Department is committed to advancing bold reforms to improve the quality of education for every New Mexican student,” said New Mexico Education Secretary Hanna Skandera. “I’m proud to welcome this team of respected experts to the Public Education Department to serve our staff as we work to accelerate progress in our schools.”

The Public Education Department has contracted with these experts as an alternative to the immediate hiring of many of the Department’s exempt positions, resulting in a cost-savings to the State of New Mexico and more time to recruit exceptional full-time talent.

### **Public Education Department Advisory Team:**

- **Catherine Freeman, Ph.D.**, is advising the Department on operational functions and education policy, including management, organizational structure and corresponding budget and legislative issues. Catherine is currently a Senior Associate with HCM Strategists, LLC. Catherine’s vast experience in K-12 education, from the local to the federal level, gives her a wide-angle lens on education issues and a strong footing in both policy research and practice. Before joining HCM, Catherine was Chief of Staff to the State Superintendent of Education for the District of Columbia. She has served in senior roles at the National Academy of Sciences and the U.S. Department of Education, where she was Deputy Assistant Secretary in the Office of Elementary and Secondary Education. There she managed the office’s implementation of the No Child Left Behind Act, including its accountability and assessment provisions. Catherine earned a bachelor’s degree from Vanderbilt University, a master’s of education from the University of Texas-Austin, and a doctorate in philosophy from Vanderbilt University, where she currently teaches a course in federal policy development and implementation.
- **Christy Hovanetz, Ph. D.**, is advising the Department on a wide range of education reform policy issues, including assessment and accountability initiatives. Christy is currently a Senior Policy Fellow for the Foundation for Excellence in Education. She previously served as the Assistant

Commissioner at the Minnesota Department of Education and Assistant Deputy Commissioner at the Florida Department of Education. She has worked in education policy for the state of Florida since 1999, serving as the Director of Evaluation and Reporting, Director of Reading First and a Policy Analyst for former Governor Jeb Bush. She graduated summa cum laude from St. Cloud State University with a Bachelor of Science Degree in Education with a minor in mathematics and is a certified teacher in the state of Minnesota. Christy earned her Masters of Public Administration at the University of Minnesota and a Doctor of Philosophy in Public Administration and Policy at The Florida State University.

- **Jay Pfeiffer** is advising the Department on data quality issues, including measures to upgrade and improve New Mexico's Student-Teacher Accountability Reporting System (STARS). Jay is currently The Program Director of the State Longitudinal Data Program of MPR Associates, Inc. of Berkeley, California. In this role, he has advised and consulted with the Data Quality Campaign, the Aspen Institute, the State Higher Education Executive Officers Organization, several foundations and states. He received the Data Quality Campaign's only life-time achievement award and is recognized as an expert on the uses of state longitudinal data systems in informing policy and education business applications including planning, designing and implementing data systems, and connecting K12 data, postsecondary education and workforce data. He has more than 30 years of experience in using stat data to support education policy and research. Jay served as the Deputy Commissioner of the Florida Department of Education up until 2009. He also co-chaired the National Education Longitudinal Data Committee of the Council of Chief State School Officers and is a member of the Independent Advisory Panel for the National Assessment of Career and Technical Education.
- **David Saba** is advising the Department on education policy issues relating to teacher effectiveness, certification and licensure. David is the founder of DWSaba Consulting and previously served as Chief Executive Officer of the American Board for Certification of Teacher Excellence (ABCTE). He is directly responsible for dramatically increasing the teacher recruitment efforts at ABCTE, having grown enrollments by more than 300 percent and has seen the organization recruit over 9,500 potential teachers into its rigorous, self-paced online teaching certification program. Before joining ABCTE, David served as the Mid Atlantic Regional Director for Kaplan Test Prep.
- **Jeff Sellers** is advising the Department on a wide range of education policy and data quality issues. Jeff has 30 years of experience working for the state of Florida in a variety of Information System capacities including data management, data warehousing, information security, data base administration and data systems. He served most recently as the Deputy Commissioner in the Florida Department of Education. He was the director Florida's PK20 Education Data Warehouse; a comprehensive data repository of education data spanning prekindergarten through postsecondary graduate level achievements; providing a seamless data link between Florida's public PK-12, workforce education, community college and university systems. Jeff has served on multiple boards, advisory committees, and taskforces for regional data centers and national organizations on issues of connecting and using data longitudinally across education sectors and with related agency services.
- **John Bailey** is advising the Department on a wide range of education policy and technology issues. John is currently the Director of Whiteboard Advisors and serves as co-publisher of *Education Insider*. He most recently served at the White House as part of former President George W. Bush's Domestic Policy Council, where he was responsible for coordinating education and labor issues. He has also worked on education policy at the state and federal level, as well as with the Bill & Melinda Gates Foundation. He was also an ex-officio member of the U.S. Department of Education's Commission on the Future of Higher Education in 2006. From 1995 to 2001, as the nation's second Director of Educational Technology and Pennsylvania's first Director of Educational Technology, John spearheaded the development of several initiatives to expand online learning and improve the use of technology and data in education.

- **Terrell Halaska** is advising the Department on a wide range of education policy and organizational issues. Terrell is a founder of HCM Strategists, LLC. Terrell previously served as the Assistant Secretary of the Department of Education for Legislation and Congressional Affairs, where she led the team negotiating reauthorization of the No Child Left Behind Act and the Higher Education Act. Prior to joining the Department of Education during former President George W. Bush's Administration, she served in the White House as special assistant to the president for domestic policy, advising the president, domestic policy advisor, and other senior staff.
- **Kristy Campbell** is advising the Department on communications, legislative and public engagement strategies. Kristy previously served as the Communications Director for former Governor Jeb Bush's two non-profit education policy organizations, the Foundation for Excellence in Education, a national 501c3 focused on advancing education reform in states across America, and the Foundation for Florida's Future, a state-based 501c4 education advocacy group. She was also Press Secretary to Governor Bush, serving as his chief spokeswoman and assisting in overseeing the Bush/Jennings Administration's public messaging and outreach at 18 state agencies, including the Florida Department of Education. Kristy most recently worked as the communications director for a gubernatorial campaign in Florida.
- **Chad Colby** is advising the Department on education policy, federal compliance and communications issues. Chad is a communications strategist and a veteran of education reform campaigns and implementation. Chad's experience in education started in the Florida Department of Education at the same time the state adopted Governor Jeb Bush's "A+ Plan." The first-of-its-kind plan instituted a school grading system with a strong accountability measures. Later, he joined the U.S. Department of Education where he managed the media affairs office and all events for the Secretary. Chad most recently worked as a communications advisor to a gubernatorial campaign in Florida.

Governor Martinez has made improving education in New Mexico a top priority and is committed to ensuring every student has access to quality schools and teachers. Her "Kids First, New Mexico Wins" plan is comprised of four key initiatives to increase accountability and transparency, set our students up for success by ending social promotion, target our resources where they are needed the most and identify and reward our most effective educators and leaders.

For more information on the New Mexico Public Education Department, please visit <http://www.ped.state.nm.us/>.

###

**QUESTIONS ABOUT THE PED ADVISORY TEAM  
THAT LESC STAFF SUBMITTED TO THE DEPARTMENT**

- According to the press release, five of the consultants – Dr. Hovanetz, Mr. Saba, Mr. Sellers, Mr. Bailey, and Ms. Halaska – advised the department on a wide range of policy issues. Can you provide some examples of those issues, the advice given, and the outcomes? What policies or practices of the department have been implemented or revised as a result of these consultants’ advice?
- In what ways has the PED management or organizational structure been amended as advised by Dr. Freeman?
- In what ways has STARS been upgraded or improved as a result of Mr. Pfeiffer’s advice? If nothing yet, what upgrades or improvements are planned?
- Likewise, what data quality issues did Mr. Sellers address? What have been the outcomes?
- What changes has PED implemented or planned in terms of communications or legislative and public engagement strategies as a result of advice from Ms. Campbell?
- What aspects of federal compliance did Mr. Colby address? What changes has PED made or planned as result of his advice?
- Did the consultants do most of their work in New Mexico or did they primarily work from other states, like their home states? Can you estimate a percentage, whether individually or as a group?
- Approximately how much money did these contracts save the state (per the phrase in the press release, “resulting in a cost-savings to the State of New Mexico”)? Per contract? As a whole?