



New Mexico School Boards Association

July 16, 2026

3:00 p.m.

Chamisa II

Sagebrush Inn Convention Center
1508 Paseo del Pueblo, Taos, NM

Board of Directors

State Officers

Marvyn Jaramillo, Mesa Vista
President

Terry O'Brain, Hobbs
President-Elect

Toby Willis, Logan
Vice-President

Patrick Cohn, Silver
Secretary-Treasurer

Pauline Jaramillo, Socorro
Immediate Past-President

Region Officers

Gary Montoya - Central

Priscilla Benally - Gallup-McKinley

Christina Aspaas - Central

Toby Velasquez - Pojoaque

Adan Delgado - Cuba

Cynthia Spray - Taos

Linda Montoya - West Las Vegas

Monica Aragon - Mora

Tony Rubin - Wagon Mound

Christopher Matson - Vaughn

Pauline Jaramillo - Socorro

Albert Chavez - Moriarty Edgewood

Inez Rodriguez - Portales

Toby Willis - Logan

Kene Terry - Logan

Travis Glenn - Tatum

Patti Ann Ancell - Lovington

Mona Kirk - Roswell

Lance Wright - Cloudcroft

Luther Light - Ruidoso

Teresa Tenorio - Las Cruces

Patrick Cohn - Silver

Alyssa Esquivel - Lordsburg

Brandy Johnson - Deming

Large District Representatives

Ronalda Tome-Warito - Albuquerque

Pamela Cort - Las Cruces

Michael Berry - Rio Rancho

Claudia Rodriguez - Gadsden

Carmen Gonzales - Santa Fe

Kevin Mitchell - Gallup-McKinley

Lisa Maxwell - Farmington

Kerry Romine - Hobbs

Past Presidents

Terry Martin - Clovis

Dymorie Maker - Lovington

Christine Ludi, West Las Vegas

Ex-Officio

Joe Guillen - Executive Director

Carlos Padilla - Cuddy McCarthy Firm

Steven J. Carrillo - NMPEC

Agenda

Welcome

Marvyn Jaramillo

Approval of Agenda (A)

Minutes of Previous Meeting (A)

Financial Report (A)

Patrick Cohn/Carolyn Mole

1. Review Morgan Stanley Account

2. Review Wells Fargo Accounts

3. Review School Law Conference Statement

4. Review 2025-2026 Budget (Year-to-Date)

Executive Director's Report

Joe Guillen

5. Fall Region Meetings Training Topic (A)

6. CES Virtual Training Agreement (A)

7. Policy Review Committee Report

8. NMSBA Strategic Plan Review

9. NSBA Report

10. Legislative Report

11. Policy Services Update

12. PSCOC Report

13. Upcoming Conferences and Meetings

Reports:

NMPSIA (Margaret Martinez); NMAA (Marvyn Jaramillo); Legal
(Carlos Padilla); NMPEC (Steven J. Carrillo);

Adjournment

Marvyn Jaramillo

(A) = Action Item

**New Mexico School Boards Association
BOARD OF DIRECTORS MEETING
School Law Conference**

Date & Time: June 4, 2026, at 3:00 PM

Location: Embassy Suites Hotel, Albuquerque, NM

Present: Marvyn Jaramillo, President
Terry O'Brain, President-Elect
Toby Willis, Vice-President
Patrick Cohn, Secretary-Treasurer
Pauline Jaramillo, Immediate Past-President

Gary Montoya, Reg I
Priscilla Benally, Region I
Christina Aspaas, Region I
Toby Velasquez, Region II
Adan Delgado, Region II
Cynthia Spray, Reg II
Linda Montoya, Region III
Dr. Monica Aragon, Reg III
Christopher Matson, Region IV
Albert Chavez, Region IV
Inez Rodriguez, Region V
Travis Glenn, Region VI
Mona Kirk, Reg VI

Lance Wright, Region VII
Alyssa Esquivel, Region VIII
Brandy Johnson, Reg VIII
Ronalda Tome-Warito, Albuquerque
Lisa Maxwell, Farmington
Claudia Rodriguez, Gadsden
Kevin Mitchell, Gallup-McKinley
Pamela Cort, Las Cruces
Michael Berry, Rio Rancho
Christine Ludi, West Las Vegas
Dymorie Maker, Lovington
Terry Martin, Clovis

Joe Guillen, Executive Director
Carolyn Mole, Finance Director
Elizabeth Egelhoff, Program Director
Dan Castille, Policy Service Director

(Presence of staff is recorded, but not considered when determining a quorum)

Carlos Padilla – Cuddy McCarthy Firm
Dusty Young – NM Athletics Association
Steven Carrillo – NM Public Education Commission
Jamie Gonzales – Public Charter Schools NM

Quorum: Yes

Business: *(Motions and actions are noted in italics)*

CALL TO ORDER - *President Marvyn Jaramillo called the meeting to order at 3:00 PM.*

APPROVAL OF AGENDA – *I. Rodriguez moved to approve the agenda as presented, seconded by T. Martin – motion carried.*

APPROVAL OF MINUTES – *D. Maker moved to approve the February 5, 2026, Board Institute Board of Director Minutes as presented, seconded by T. Glenn - motion carried.*

FINANCIAL REPORT – Presented by Patrick Cohn, Secretary-Treasurer

1. Morgan Stanley Account – The reserve account balance is at \$534,188.55 as of March 31st.

2. Wells Fargo Accounts

- a. Operating/Checking Account reflects a balance of \$329,243.66 as of April 30th.
- b. NMSBA Property Account reflects a balance of \$118,290.34 as of April 30th.

- c. Scholarship and Training Materials Fund reflects a balance of \$987.18 as of May 7th. It was noted that following this conference, we will be transferring \$24,000 into the Scholarship account for this year's scholarship award recipients.

3. Board Institute Profit & Loss Statement – Board Institute was held February 5-7, 2026 in Santa Fe. The total income generated was \$174,000. The total expenses for the Board Institute were \$95,558.76. Although the conservative estimated profit was \$20,000, the actual profit was \$78,441.21.

4. 2025-26 Budget Status Year-to-Date

Revenue Report

- a. Dues collected are at 100%.
- b. Conference revenues continue to exceed projections. The School Law Conference revenues will be realized after the event.
- c. Policy Service program revenues remain stable and slightly over projections.
- d. Total revenues are slightly above projections. We have already realized \$1,135,047. or 123% of our budgeted revenue of \$925,369.

Expenditure Report (p.12 in blue print)

- a. We are under-expended in almost all budget categories with a few exceptions. Subscriptions are an exception, as we are over the budgeted amount due to the purchase of new Accounting Software, along with the costs of Zoom, Survey Monkey, etc. and will be adjusted accordingly in the coming budget.
- b. Expenditures show we are only expended at 76% or \$699,023 of our budget of \$925,369 at almost the end of the fiscal year.

C. Ludi moved to approve the financial report as presented, seconded by L. Wright – motion carried.

EXECUTIVE DIRECTOR'S REPORT – Presented by Joe Guillen

5. 2025-2026 NMSBA Accomplishments – J. Guillen provided a detailed report of the year's accomplishments.

6. Finance & Program Directors Employment - J. Guillen recommended re-employing both the Finance Director and Program Director with a 1% salary increase, consistent with the increase received by public school employees this year. *I. Rodriguez moved to re-employ the Finance Director and Program Director with a 1% salary increase as recommended, seconded by A. Chavez – motion carried.*

7. Executive Director Evaluation/Employment - M. Jaramillo presented the Executive Director's evaluation prepared by the Executive Board to the Board of Directors. *After discussion, G. Montoya moved to approve the Executive Director's evaluation along with a 1% salary increase and an additional one-year contract extension through July 2028, seconded by C. Spray – motion carried.*

8. Professional Service Contract Extensions - J. Guillen recommended the following:

- Approval to extend the current professional service agreement with R. Daniel Castille, NMSBA Policy Service Director, by one year through June 30, 2027 with all the same terms and conditions including an annual salary of \$78,000. *G. Montoya moved to extend the professional services contract with R. Daniel Castille as recommended, seconded by L. Maxwell – motion carried.*
- Approval of the professional service agreement with Lilliemae Ortiz for the 2027 Legislative Session with compensation not to exceed \$25,000 plus New Mexico Gross Receipt Tax. Compensation reflects the 60-day session. *I. Rodriguez moved to extend the professional services contract with Lilliemae Ortiz as recommended, seconded by T. Martin – motion carried.*
- Approval of two Cuddy & McCarthy professional service agreements:
 - One for legal representation and legal services at a retainer of \$250 per month plus tax and other expenses through June 30, 2027. *P. Cort moved to extend the professional services contract with Cuddy & McCarthy Law Firm for legal representation and legal services as recommended, seconded by G. Montoya – motion carried.*

- One for cooperation with NMSBA in conducting the Annual School Law Conference through June 30, 2027. *G. Montoya moved to extend the professional services contract with Cuddy & McCarthy Law Firm for cooperation with NMSBA in conducting the Annual School Law Conference as recommended, seconded by C. Spray – motion carried.*

9. 2026-2027 Membership Dues - J. Guillen recommended freezing membership dues at current rates for another year. Consistent with Article B-II of the NMSBA Bylaws, membership dues are based on each district's prior-year actual revenues as maintained by the New Mexico Public Education Department. It was noted that the most recent actual revenues posted by NMPED are from 2018-2019, and those figures were again used for this year's calculations. It was further noted that dues may need to increase within the next year or two because operating costs have continued to rise. NMSBA has been able to absorb those increased costs since 2008-2009. *G. Montoya moved to approve freezing membership dues at the current rate for another year as recommended, seconded by C. Spray – motion carried.*

10. Proposed FY 2026-2027 NMSBA Budget – J. Guillen presented the proposed budget for approval. The proposed budget totals \$945,775.97 which is an increase of \$20,406.87 over the current-year budget of \$925,369.10. The operating budget was developed to be consistent with our mission and objectives, responsive to the needs of our membership and conservative in terms of revenue and expenses. *L. Wright moved to approve the Proposed FY 2026-2027 NMSBA Budget as recommended, seconded by A. Chavez – motion carried.*

11. FY 2025 Audit Report - J. Guillen reviewed the 2025 Audit Report and highlighted the unconditional opinion from the contract auditor. He also reviewed the suggestions provided by the auditor for consideration. *G. Montoya moved to approve the 2025 Audit Report as recommended, P. Benally seconded – motion carried.*

12. 2026 Scholarship Awards – J. Guillen presented the 2026 Scholarship Award recommendations for ratification and recommended adjusting next year's timeline to release recipient names earlier, before graduation. Sixty nominations were received, and twenty-four students—three from each region—were selected by Region Officers to receive \$1,000 scholarships, for a total of \$24,000. J. Guillen noted that all nominees were highly qualified and because of that, the Region Officers expressed that the selections were especially competitive this year. *G. Montoya moved to ratify the Region Officers' selection of scholarship recipients and to adjust next year's timeline as recommended, seconded by L. Montoya – motion carried.*

13. Legislative Report – J. Guillen reviewed the LFC Newsletter and LESC meeting agenda, schedule of interim committee meetings and governance study being prepared by LESC staff.

14. NSBA Report - J. Guillen reviewed the federal update and called specific attention to the NSBA call for presentation proposals and request for Magna Awards nominations.

15. Policy Services Update – Dan Castille reviewed the most recent policy advisories issued in April included on pages 59-60 of the board packet.

16. PSCOC Report – J. Guillen reviewed a listing of school districts who applied for funding assistance from the Public School Capital Outlay Council who is scheduled to make funding decisions on June 11, 2026.

17. Upcoming Meetings Calendar – J. Guillen reviewed the calendar of upcoming meetings.

REPORTS

NMAA - Dusty Young, NMAA Executive Director reported on a new proposal for eligibility transfers for varsity athletes that was discussed at his board meeting but would need to be voted on by the membership (athletic directors). Toby Velasquez provided additional updates regarding bylaws for multiple sports.

NMPEC - Steven Carrillo, NM Public Education Commission member and Jamie Gonzalez, Advocacy Director for Public Charter Schools of New Mexico co-presented a resolution entitled, "Resolution Supporting Adequate Funding for Safe and Reliable Transportation for All New Mexico Public School Students". They expressed hope that NMSBA school boards would join in support of this resolution at the NM Legislature. J. Guillen informed the board that this resolution was consistent with the current NMSBA Legislative Platform.

Legal – Carlos Padilla provided an update on the Superintendent's lawsuit and amicus brief regarding school days.

ADJOURNMENT – *M. Jaramillo adjourned the meeting at 5:14 PM.*

NEXT MEETING – Thursday, July 16, 2026 at the Sagebrush Inn, Taos, NM prior to the Leadership Retreat.

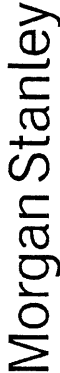
These minutes were approved as presented. ____/____/____

OR

The following changes and/or corrections were made.

The minutes were approved as corrected. ____/____/____

Signed by NMSBA Secretary-Treasurer:



STATEMENT FOR:
NEW MEXICO SCHOOL BOARDS ASSC

Beginning Total Value (as of 4/1/26) \$534,188.55
Ending Total Value (as of 6/30/26) \$534,055.13
Includes Accrued Interest

Your Financial Advisor Team
Park Square Group
+1 505 883-6262

Your Financial Advisor
Akash Patel
Akash.Patel@morganstanley.com
+1 505 889-2834

Your Branch
6565 AMERICAS PKWY NE, STE 400
ALBUQUERQUE, NM 87110
Telephone: 505-883-6262; Alt. Phone: 800-776-5973; Fax: 505-889-2858

Client Service Center (24 Hours a Day; 7 Days a Week): 800-869-3326
Access Your Account Online: www.morganstanley.com/online

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NOT INSURED BY ANY FEDERAL GOVERNMENT AGENCY • NOT BANK GUARANTEED •
MAY LOSE VALUE • UNLESS SPECIFICALLY NOTED, ALL VALUES ARE DISPLAYED IN USD

#BWNJGWM
NEW MEXICO SCHOOL BOARDS ASSC
C/O CAROLYN L MOLE &
JOSEPH E GUILLEN JR.
300 GALISTEO ST SUITE 204
Santa Fe NM 87501-2607

Morgan Stanley Smith Barney LLC. Member SIPC.

Navigate Business CheckingSM

May 31, 2026 ■ Page 1 of 5



NEW MEXICO SCHOOL BOARDS ASSOCIATION
300 GALISTEO ST STE 204
SANTA FE NM 87501-2607

Questions?

Available by phone Mon-Sat 7:00am-11:00pm
Eastern Time, Sun 9:00am-10:00pm Eastern Time:
We accept all relay calls, including 711

1-800-CALL-WELLS (1-800-225-5935)

En español: 1-877-337-7454

Online: wellsfargo.com/biz

Write: Wells Fargo Bank, N.A. (585)
P.O. Box 6995
Portland, OR 97228-6995

Remember, always be cautious when you're asked for your personal information or money. Don't respond until you validate "who" and "why". You are in control when it's your money.

* Sign-up may be required. Availability may be affected by your mobile carrier's coverage area. Your mobile carrier's message and data rates may apply.

Statement period activity summary

Beginning balance on 5/1	\$329,243.66
Deposits/Credits	18,816.45
Withdrawals/Debits	- 46,121.22
Ending balance on 5/31	\$301,938.89

Account number:

NEW MEXICO SCHOOL BOARDS ASSOCIATION

New Mexico account terms and conditions apply

For Direct Deposit use
Routing Number (RTN): 107002192

For Wire Transfers use
Routing Number (RTN): 121000248

Initiate Business CheckingSM

June 5, 2026 ■ Page 1 of 4



NEW MEXICO SCHOOL BOARDS ASSOC
300 GALISTEO ST STE 204
SANTA FE NM 87501-2607

Questions?

Available by phone Mon-Sat 7:00am-11:00pm Eastern Time, Sun 9:00am-10:00pm Eastern Time:

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Online: wells Fargo.com/biz

Write: Wells Fargo Bank, N.A. (585)
P.O. Box 6995
Portland, OR 97228-6995

Statement period activity summary

Beginning balance on 5/8	\$987.18
Deposits/Credits	0.00
Withdrawals/Debits	- 0.00
Ending balance on 6/5	\$987.18

Account number:

NEW MEXICO SCHOOL BOARDS ASSOC

NEW Mexico account terms and conditions apply

For Direct Deposit use

Routing Number (RTN): 107002192

For Wire Transfers use

Routing Number (RTN): 121000248

Initiate Business CheckingSM

June 30, 2026 ■ Page 1 of 4



NEW MEXICO SCHOOL BOARDS ASSOC
300 GALISTEO ST STE 204
SANTA FE NM 87501-2607

Questions?

Available by phone Mon-Sat 7:00am-11:00pm Eastern Time, Sun 9:00am-10:00pm Eastern Time:

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Write: Wells Fargo Bank, N.A. (585)
P.O. Box 6995
Portland, OR 97228-6995

Statement period activity summary

Beginning balance on 6/1	\$121,340.61
Deposits/Credits	3,080.00
Withdrawals/Debits	- 0.00
Ending balance on 6/30	\$124,420.61

Account number: 1489216067 (primary account)

NEW MEXICO SCHOOL BOARDS ASSOC

NEW Mexico account terms and conditions apply

For Direct Deposit use

Routing Number (RTN): 107002192

For Wire Transfers use

Routing Number (RTN): 121000248

Other Wells Fargo Benefits

Be mindful of ongoing scams affecting older adults. Help protect yourself and loved ones from:

- Investment scams - the scammer makes friends with you on social media then offers to show you how to invest in crypto or another "money making" opportunity. Watch out for promises of big returns, suggestions to invest in crypto, or requests to wire money.

- Scam Callers Pretending to Be Tech Help - scammers pose as a computer technician, or you may get a pop-up window on your screen warning you about an issue with your device.

If you have a real tech issue: go to a local company that you know and trust. Be on the lookout for fake websites. Never trust someone who contacts you first or asks for access to your device. If this happens to you, it's a scam.

Learn more at wellsfargo.com/scams

New Mexico School Boards Association

2026 School Law Conference

April 1-August 31, 2026

	TOTAL
Revenue	
5005 CONFERENCES/CONVENTIONS	
5030 School Law Conference	
5030.01 Registration	163,312.50
5030.02 Sponsor	2,000.00
5030.06 Exhibitor	5,100.00
5030.09 Meal Function	12,950.00
Total for 5030 School Law Conference	\$183,362.50
Total for 5005 CONFERENCES/CONVENTIONS	\$183,362.50
Total for Revenue	\$183,362.50
Cost of Goods Sold	
Gross Profit	\$183,362.50
Expenditures	
6500 CONFERENCE/CONVENTION	
6525 School Law Conference	
6525.03 Equipment Rental	25,087.05
6525.04 Meals	38,562.04
6525.05 Lodging	4,379.00
6525.07 Printing	971.19
6525.08 Travel	130.64
6525.12 Supplies	505.31
6525.15 Hired Help	220.00
Total for 6525 School Law Conference	\$69,855.23
Total for 6500 CONFERENCE/CONVENTION	\$69,855.23
Total for Expenditures	\$69,855.23
Net Operating Revenue	\$113,507.27
Other Revenue	
Other Expenditures	
Net Other Revenue	
Net Revenue	\$113,507.27

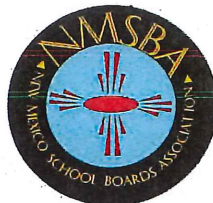
Budgeted Revenue	\$70,000
Budgeted Expense	\$50,000
Budgeted Income	\$20,000

A	B	C	D	E	F	G
1						7/9/2026
2	CATEGORIES	NMSBA REVENUE REPORT				
3		2024-2025 APPROVED BUDGET		2025-2026 APPROVED BUDGET		
4		BUDGETED	YTD	BUDGETED	YTD	YTD
5		REVENUE	REVENUE	REVENUE	REVENUE	% REVENUE
6		2024-2025	2024-2025	2025-2026	2025-2026	2025-2026
7	NMSBA DUES					
8	Dues	\$262,240.07	\$262,240.07	\$262,240.07	\$262,240.07	100.00%
9	SUBTOTAL	\$262,240.07	\$262,240.07	\$262,240.07	\$262,240.07	100.00%
10	NMSBA CONFERENCES					
11	Board Member Institute	\$55,000.00	\$162,526.00	\$60,000.00	\$175,000.00	291.67%
12	School Law Conference	\$65,000.00	\$197,675.00	\$70,000.00	\$183,362.50	261.95%
13	Leadership Retreat	\$7,000.00	\$42,093.00	\$15,000.00	\$31,175.00	207.83%
14	Annual Convention	\$55,000.00	\$150,526.00	\$60,000.00	\$168,849.90	281.42%
15	Region Meetings	\$10,000.00	\$12,275.00	\$10,000.00	\$9,750.00	97.50%
16	Western Region Conference	\$0.00	\$0.00	\$0.00	\$18,033.66	0.00%
17	Celebrating Opportunities	\$0.00	\$0.00	\$0.00	\$0.00	0.00%
18	SUBTOTAL	\$192,000.00	\$565,095.00	\$215,000.00	\$586,171.06	272.64%
19	NMSBA SERVICES					
20	Board Workshops	\$1,000.00	\$0.00	\$1,000.00	\$0.00	0.00%
21	Policy Review	\$0.00	\$0.00	\$0.00	\$0.00	0.00%
22	Web Link for Exhibitors	\$200.00	\$0.00	\$200.00	\$0.00	0.00%
23	Board Book	\$500.00	\$500.00	\$500.00	\$910.00	182.00%
24	Policy Service	\$345,000.00	\$366,435.00	\$345,000.00	\$371,910.00	107.80%
25	Policy Service Reimburse	\$0.00	\$0.00	\$0.00	\$0.00	0.00%
26	Commissions	\$0.00	\$3,850.00	\$0.00	\$2,100.00	0.00%
27	SUBTOTAL	\$346,700.00	\$370,785.00	\$346,700.00	\$374,920.00	108.14%
28	INTEREST INCOME					
29	Operating Bank Account	\$50.00	\$18.75	\$50.00	\$22.84	45.68%
30	Morgan Stanley	\$1,000.00	\$266.58	\$1,000.00	\$200.40	20.04%
31	SUBTOTAL	\$1,050.00	\$285.33	\$1,050.00	\$223.24	21.26%
32	OTHER INCOME					
33	Annual/Assoc.Membership	\$5,000.00	\$6,000.00	\$5,000.00	\$2,000.00	40.00%
34	Sales/Products	\$100.00	\$0.00	\$100.00	\$0.00	0.00%
35	NSBA COSA Dues	\$0.00	\$2,170.00	\$0.00	\$0.00	0.00%
36	Miscellaneous / Endorsments	\$1,000.00	\$0.00	\$1,000.00	\$0.00	0.00%
37	NSBA Affiliate Profit Sharing	\$0.00	\$0.00	\$0.00	\$0.00	0.00%
38	SUBTOTAL	\$6,100.00	\$8,170.00	\$6,100.00	\$2,000.00	32.79%
39	Budgeted Cash Balance	\$108,944.92	\$108,944.92	\$98,279.03	\$98,279.03	100.00%
40	GRAND TOTAL REVENUES	\$917,034.99	\$1,315,520.32	\$929,369.10	\$1,323,833.40	142.44%
41	Money Market Account (6/30/26)	\$534,055.13				
42	Bank Account Balance (5/31/26)	\$301,938.89				

A	B	C	D	E	F	G
NMSBA EXPENDITURE REPORT						
CATEGORIES	2024-2025 APPROVED BUDGET			2025-2026 APPROVED BUDGET		
	BUDGETED	YTD	YTD	BUDGETED	YTD	YTD
	EXPENSE	EXPENSE	% EXPENSE	EXPENSE	EXPENSE	% EXPENSE
	2024-2025	2024-2025	2024-2025	2025-2026	2025-2026	2025-2026
6 Office Personnel Salaries						
7 Executive Director	\$157,823.27	\$157,823.27	100.00%	\$164,136.20	\$164,136.20	100.00%
8 Finance Director	\$86,275.72	\$86,275.72	100.00%	\$89,726.74	\$89,726.74	100.00%
9 Programs Director	\$64,254.00	\$64,254.00	100.00%	\$66,824.16	\$75,492.13	112.97%
10 Part-time / Other	\$0.00	\$0.00	0.00%	\$6,000.00	\$6,000.00	100.00%
11 Miscellaneous Leave	\$0.00	\$0.00	0.00%	\$0.00	\$0.00	0.00%
12 Bonus						
13						
14 Subtotal	\$308,352.99	\$308,352.99	100.00%	\$326,687.10	\$335,355.07	102.65%
15 Administrative Services						
16 Printing/Publishing	\$2,500.00	\$204.66	8.19%	\$2,500.00	\$979.75	39.19%
17 Legal Services	\$4,000.00	\$2,990.55	74.76%	\$4,000.00	\$2,704.70	67.62%
18 Lobbying Expenses	\$25,000.00	\$27,130.03	108.52%	\$16,000.00	\$15,037.64	93.99%
19 Audit	\$14,000.00	\$18,489.38	132.07%	\$18,000.00	\$25,810.31	143.39%
20 Subscriptions	\$300.00	\$0.00	0.00%	\$300.00	\$3,872.51	1290.84%
21 Subtotal	\$45,800.00	\$48,814.62	106.58%	\$40,800.00	\$48,404.91	118.64%
22						
23 Administrative Travel						
24 Auto Expense/Travel	\$2,500.00	\$2,682.33	107.29%	\$2,500.00	\$3,836.35	153.45%
25 Meals/Lodging	\$2,500.00	\$659.34	26.37%	\$2,500.00	\$940.41	37.62%
26 Conferences/Training	\$2,500.00	\$2,389.06	95.56%	\$2,500.00	\$2,407.74	96.31%
27 Subtotal	\$7,500.00	\$5,730.73	76.41%	\$7,500.00	\$7,184.50	95.79%
28						
29 Office Expenses						
30 Parking	\$2,500.00	\$2,576.75	103.07%	\$2,500.00	\$1,575.00	63.00%
31 Advertisement	\$500.00	\$0.00	0.00%	\$500.00	\$0.00	0.00%
32 Postage	\$3,000.00	\$1,330.78	44.36%	\$3,000.00	\$878.16	29.27%
33 Supplies\Expense	\$5,000.00	\$5,615.33	112.31%	\$5,000.00	\$8,430.22	168.60%
34 Maintenance	\$4,500.00	\$5,048.76	112.19%	\$4,500.00	\$3,049.78	67.77%
35 Telephone	\$6,000.00	\$6,402.91	106.72%	\$6,000.00	\$7,293.45	121.56%
36 Internet/Web Hosting	\$5,000.00	\$1,420.53	28.41%	\$5,000.00	\$3,198.01	63.96%
37 Promotional	\$6,000.00	\$7,004.46	116.74%	\$6,000.00	\$2,996.44	49.94%
38 Subtotal	\$32,500.00	\$29,399.52	90.46%	\$32,500.00	\$27,421.06	84.37%
39						

	A	B	C	D	E	F	G
40	Plant Operations						
41	Building Association Fees	\$6,000.00	\$5,822.70	97.05%	\$6,000.00	\$6,606.54	110.11%
42	Building Maintenance	\$4,000.00	\$18,476.54	461.91%	\$4,000.00	\$0.00	0.00%
43	Utilities	\$1,000.00	\$957.76	95.78%	\$1,000.00	\$1,286.84	128.68%
44	Subtotal	\$11,000.00	\$25,257.00	229.61%	\$11,000.00	\$7,893.38	71.76%
45							
46							
47	Employee Benefits						
48	Retirement	\$50,000.00	\$48,387.60	96.78%	\$50,000.00	\$59,357.75	118.72%
49	Social Security	\$25,000.00	\$24,628.13	98.51%	\$25,000.00	\$22,405.76	89.62%
50	Workers Compensation	\$100.00	\$61.65	61.65%	\$100.00	\$40.50	40.50%
51	Unemployment Tax	\$500.00	\$310.62	62.12%	\$500.00	\$381.39	76.28%
52	Health/Life	\$35,000.00	\$35,834.78	102.39%	\$35,000.00	\$36,765.89	105.05%
53	Basic Life	\$250.00	\$173.58	69.43%	\$250.00	\$127.30	50.92%
54	Subtotal	\$110,850.00	\$109,396.36	98.69%	\$110,850.00	\$119,078.59	107.42%
55							
56	Insurance						
57	Auto Insurance	\$3,000.00	\$2,995.00	99.83%	\$3,000.00	\$3,485.00	116.17%
58	Directors & Officers Liability	\$2,500.00	\$2,405.00	96.20%	\$2,500.00	\$2,486.00	99.44%
59	Building Contents	\$750.00	\$825.00	110.00%	\$750.00	\$730.00	97.33%
60	Commercial Crime	\$3,000.00	\$1,983.00	66.10%	\$3,000.00	\$1,983.00	66.10%
61	Worker's Compensation	\$1,500.00	\$1,176.00	78.40%	\$1,500.00	\$709.38	47.29%
62	Subtotal	\$10,750.00	\$9,384.00	87.29%	\$10,750.00	\$9,393.38	87.38%
63							
64	Dues and Bonds						
65	NSBA	\$20,282.00	\$20,282.00	100.00%	\$20,282.00	\$20,282.00	100.00%
66	Subtotal	\$20,282.00	\$20,282.00	100.00%	\$20,282.00	\$20,282.00	100.00%
67							
68	Capital Outlay						
69	Equipment/Furniture	\$0.00	\$1,968.03	0.00%	\$0.00	\$0.00	0.00%
70	Auto Purchase	\$0.00	\$0.00	0.00%	\$0.00	\$0.00	0.00%
71	Subtotal	\$0.00	\$1,968.03	0.00%	\$0.00	\$0.00	0.00%
72							
73	Committees/Programs						
74	Board of Directors	\$12,500.00	\$15,518.42	124.15%	\$12,500.00	\$14,674.44	117.40%
75	Resolutions/Legislative	\$4,500.00	\$3,844.29	85.43%	\$4,500.00	\$6,897.12	153.27%
76	Nominations	\$500.00	\$0.00	0.00%	\$500.00	\$0.00	0.00%
77	Student Achievement Award	\$3,500.00	\$2,051.30	58.61%	\$3,500.00	\$2,946.25	84.18%
78	Leadership Development	\$2,000.00	\$2,094.40	104.72%	\$2,000.00	\$1,371.58	68.58%
79	Policy	\$0.00	\$356.85	0.00%	\$0.00	\$0.00	0.00%
80	Subtotal	\$23,000.00	\$23,865.26	103.76%	\$23,000.00	\$25,889.39	112.56%

	A	B	C	D	E	F	G
81							
82	Conferences/Conventions						
83	Board Member Institute	\$40,000.00	\$89,849.97	224.62%	\$40,000.00	\$88,058.76	220.15%
84	School Law Conference	\$50,000.00	\$67,225.93	134.45%	\$50,000.00	\$69,855.23	139.71%
85	Leadership Retreat	\$10,000.00	\$18,878.18	188.78%	\$10,000.00	\$14,493.26	144.93%
86	Annual Convention	\$35,000.00	\$66,863.97	191.04%	\$35,000.00	\$61,712.74	176.32%
87	Region Meetings	\$15,000.00	\$16,710.80	111.41%	\$15,000.00	\$15,427.38	102.85%
88	NSBA Leadership Conference	\$10,000.00	\$0.00	0.00%	\$10,000.00	\$0.00	0.00%
89	NSBA Advocacy Conference	\$13,000.00	\$20,029.65	154.07%	\$13,000.00	\$22,333.95	171.80%
90	NSBA Annual Conference	\$20,000.00	\$13,507.38	67.54%	\$20,000.00	\$19,290.11	96.45%
91	NSBA Liason Conf./Mtgs.	\$3,500.00	\$100.00	2.86%	\$3,500.00	\$5,195.33	148.44%
92	NSBA President's Retreat	\$0.00	\$0.00	0.00%	\$0.00	\$0.00	0.00%
93	Western Region	\$12,500.00	\$15,913.87	127.31%	\$12,500.00	\$8,295.54	66.36%
94	Celebrating Opportunities	\$0.00	\$0.00	0.00%	\$0.00	\$0.00	0.00%
95	Subtotal	\$209,000.00	\$309,079.75	147.89%	\$209,000.00	\$304,662.30	145.77%
96							
97	Other Expenses						
98	Advocacy Campaign	\$5,000.00	\$0.00	0.00%	\$4,000.00	\$0.00	0.00%
99	Policy Service	\$115,000.00	\$111,202.89	96.70%	\$120,000.00	\$102,792.86	85.66%
100	NSBA Reception	\$0.00	\$0.00	0.00%	\$0.00	\$0.00	0.00%
101	Contributions & Donations	\$3,000.00	\$250.00	8.33%	\$3,000.00	\$157.02	5.23%
102	Board Training & Documents	\$10,000.00	\$0.00	0.00%	\$10,000.00	\$0.00	0.00%
103	Subtotal	\$133,000.00	\$111,452.89	83.80%	\$137,000.00	\$0.00	0.00%
104							
105	Contingency Fund						
106	Policy Service Reserve	\$0.00	\$0.00	0.00%	\$0.00	\$0.00	0.00%
107	Contingency Fund	\$5,000.00	\$6,000.00	120.00%	\$0.00	\$0.00	0.00%
108	Subtotal	\$5,000.00	\$6,000.00	120.00%	\$0.00	\$0.00	0.00%
109							
110	Building Fund						
111	Mortgage	\$0.00	\$0.00	0.00%	\$0.00	\$0.00	0.00%
112	Reserve	\$0.00	\$0.00	0.00%	\$0.00	\$0.00	0.00%
113	Subtotal	\$0.00	\$0.00	0.00%	\$0.00	\$0.00	0.00%
114							
115	GRAND TOTAL EXPENSES	\$917,034.99	\$1,008,983.15	110.03%	\$929,369.10	\$905,564.58	97.44%
116	GRAND TOTAL REVENUES	\$917,034.99			\$929,369.10		



NMSBA Fall 2026 Region Meetings

<u>Region</u>	<u>Date</u>	<u>Host</u>
Region II Chama, Cuba, Espanola, Jemez Mountain, Los Alamos, Mesa Vista, Pecos, Penasco, Pojoaque, Questa, Santa Fe, Taos	Monday, September 14, 2026	Los Alamos
Region V Clovis, Dora, Elida, Floyd, Fort Sumner, Grady, House, Logan, Melrose, Portales, San Jon, Texico, Tucumcari	Tuesday, September 15, 2026	Portales
Region VI Artesia, Carlsbad, Dexter, Eunice, Hagerman, Hobbs, Jal, Lake Arthur, Loving, Lovington, Roswell, Tatum	Monday, September 21, 2026	Eunice+
Region VIII Animas, Cobre, Deming, Lordsburg, Quemado, Reserve, Silver	Tuesday, September 22, 2026	Silver
Region I Aztec, Bloomfield, Central, Dulce, Farmington, Gallup-McKinley, Zuni	Monday, September 28, 2026	Dulce +
Region IV Albuquerque, Belen, Bernalillo, Estancia, Grants-Cibola, Jemez Valley, Los Lunas, Magdalena, Moriarty-Edgewood, Mountainair, Rio Rancho, Socorro, Vaughn	Tuesday, September 29, 2026	Socorro
Region III Cimarron, Clayton, Des Moines, Las Vegas City, Maxwell, Mora, Mosquero, Raton, Roy, Santa Rosa, Springer, Wagon Mound, West Las Vegas	Monday, October 5, 2026	Las Vegas City
Region VII Alamogordo, Capitan, Carrizozo, Cloudcroft, Corona, Gadsden, Hatch, Hondo, Las Cruces, Ruidoso, T or C, Tularosa	Tuesday, October 6, 2026	Alamogordo

() Indicates a change from regular meeting dates due to conflict*

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4.21.25



NMSBA Region Meetings Fall 2026

NMSBA Region Meetings are conducted twice a year (Spring & Fall) at a “host” school district within each of the eight (8) NMSBA regions. Each region meeting program includes a social activity, general organizational update and a training activity. The standardized training activity is determined by the Board of Directors for the fall region meetings. Please review topics listed below and be prepared to select a topic to be presented at all fall meetings. In addition, our education association partners, including NMCEL, NMSSA, NMAA, CES, NMASBO, and NMPSIA, will be present to provide brief updates in the fall.

Hot Topics NMSBA/PED/Officers/Local School Officials

- ☐ School Re-Entry Models/Best Practices
- ☐ Public School Advocacy
- ☐ Equity Councils & Martinez/Yazzie Lawsuit
- ☐ Communications and Public Relations
- ☐ Public School Safety Initiatives
- ☐ Public School Funding Formula
- ☐ Teacher and Principal Evaluation
- ☐ Teacher Retention & Recruitment
- ☐ Financial and Audit Oversight & Accountability
- ☐ Improving School District Accountability
- ☐ Graduation Requirements
- ☐ Student Absenteeism
- ☐ Others _____
- ☐ _____
- ☐ _____

Cuddy & McCarthy Law Firm

- ☐ The Governmental Conduct Act and required disclosures and ethical rules
- ☐ Open meetings issues – prayer and public comment at board meetings
- ☐ Update on student discipline policies / student search and seizure rules
- ☐ Title IX and Athletics
- ☐ Board and Superintendent Relations
- ☐ School security and safety concerns
- ☐ Social media use and abuse amongst students and teachers
- ☐ Issues in Procurement and Contracting
- ☐ Employee misconduct v. incompetence – what is the difference and how should they be addressed?

Walsh Gallegos Law Firm

- ☐ Board Authority, Responsibility and Roles
- ☐ Holding Effective Board Meetings without Violating the Law
- ☐ Open Meetings Act Issues and Scenarios
- ☐ School Board – Superintendent Relations – including how to stay in your lane
- ☐ Board Policies concerning student discipline / student search and seizure / physical restraint and seclusion
- ☐ Confidentiality of Student Records

Ortiz & Zamora Law Firm

- ☐ Administrator Boot Camp --- A Review of Common School Administrator Legal Issues
- ☐ Crafting Fair Superintendent Contracts and Evaluations
- ☐ Superintendent and Board Relations
- ☐ Workplace Harassment Prevention
- ☐ Supervision and Documentation Basics for Administrators
- ☐ Board Norms: Establishing the “Rules of the Road” for Your Board
- ☐ Protecting Your District from Whistleblower and Discrimination Claims
- ☐ Community Campaigns to Support Mail-In Elections and Other Initiatives
- ☐ Guns on Campus: Managing Staff and Student Safety
- ☐ Understanding Ethics and Transparency Obligations: IPRA, OMA, Ethics and Governmental Conduct Act
- ☐ Open Meetings Act Masterclass
- ☐ Understanding Current Transgender Issues in Schools
- ☐ IPRA and Public Records: Invest Time Now or Pay a Ton Tomorrow
- ☐ From Walkouts to Social Media: 1st Amendment Rights of Staff and Students

NM Public School Facilities Authority

- ☐ Board Responsibility on RFPs—What do board members need to know?
- ☐ Educational and Community Space and Lowering Operational Costs.
- ☐ Update on Standards Based Capital Awards & Ranking System
- ☐ Construction Procurement Type Decisions and Payments
- ☐ How to Conduct a Successful Bond Election.
- ☐ Broadband and E-Rate for Public Schools
- ☐ School Safety Program and Application Process

7/8/26

CES Virtual School Board Member Training Proposal

Prepared for: New Mexico School Boards Association (NMSBA)

Prepared by: Cooperative Educational Services (CES)

Executive Summary

Cooperative Educational Services (CES) proposes to offer **virtual, one-hour school board member training sessions** designed to assist in meeting the **New Mexico Public Education Department (NMPED)** requirements for board member training and credit. Each training session will consist of a **one-hour module**, aligned to the **NMPED-designated training categories**, and will be **submitted for and receive NMPED approval** for official New Mexico school board member training credit.

These virtual sessions are designed to be **efficient, high-quality, and accessible**, allowing districts to participate and ensure that board members receive consistent, standards-aligned training that directly connects governance responsibilities to student outcomes, fiscal oversight, and effective leadership.

Purpose and Need

Effective school governance is critical to student achievement, fiscal responsibility, and community trust. NMPED requires ongoing professional learning for school board members across five core areas to ensure informed decision-making and legal compliance. Districts often face challenges related to:

- Scheduling and coordinating approved training
- Ensuring alignment to current statutes and NMPED expectations
- Providing engaging, relevant learning for adult participants

CES regional trainings address these needs by providing a **virtually accessible, comprehensive solution** that is practical, compliant, and grounded in the realities of New Mexico school districts.

Partnership with the New Mexico School Boards Association (NMSBA)

CES will deliver these virtual school board trainings in strong partnership and collaboration with the New Mexico School Boards Association (NMSBA). This collaboration ensures that all training modules reflect statewide governance priorities, current best practices, and consistent messaging for New Mexico school board members.

Through this partnership:

- CES and NMSBA will align training content to NMPED requirements, statutory expectations, and statewide governance standards
- Training modules will reinforce shared frameworks such as effective governance, ethical leadership, and board–superintendent roles
- Board members will experience coherent, consistent guidance that complements NMSBA resources, advocacy, and professional learning offerings
- Virtual trainings will strengthen relationships between districts, CES, and NMSBA, supporting a unified approach to board development across New Mexico

This collaborative model leverages the strengths of both organizations—CES’s instructional design, facilitation expertise, and regional service capacity, and NMSBA’s leadership in board governance and statewide support—to deliver high-quality, relevant, and credible training experiences.

Training Overview

Format: Virtual, live training modules

Duration: 1 hour for each module

Credit: One (1) hour of NMPED-approved credit in each required category

Audience:

- Local school board members
- Newly elected or appointed board members
- Veteran board members seeking required annual training hours

Location: Delivered virtual via Zoom

Alignment to NMPED Training Categories

Each module will be explicitly aligned to one of the five NMPED-required board training categories, with learning objectives, content, and activities clearly documented for approval and audit purposes.

Current Approved NMPED Virtual Modules (as of 7/8/2026)

- School Board Self-Evaluation (Category A)
- School Finance Fundamentals and Fiscal Oversight (Category B)
- Demystifying Legal Concepts (Category C)
- Superintendent Evaluation (Category D)
- Strategic Planning (Category E)

Additional training modules may be developed as requested by NMSBA.

Instructional Design and Adult Learning Approach

CES trainings are designed using adult learning principles and emphasize practical application. Each module includes:

- Clear learning objectives aligned to NMPED requirements
- Interactive activities
- District-relevant examples and data-informed decision-making
- Opportunities for reflection and peer learning

Participants leave with concrete tools and a stronger understanding of how governance decisions directly impact students, staff, and communities.

CES Responsibilities

CES will:

- Design and facilitate all training modules
 - Ensure alignment to current NMPED statutes, rules, and guidance
 - Submit training modules for NMPED approval for board member credit
 - Provide sign-in sheets, agendas, and completion documentation
 - Supply training materials and participant handouts
 - Facilitate high-quality, professional learning experiences
-

NMSBA Responsibilities

NMSBA will:

- Coordinate training dates with CES
- Cover training expenses for CES presenters

District Responsibilities

Participating districts will:

- Coordinate registration and communication with board members
 - Ensure attendance tracking and compliance with local requirements
 - Provide basic logistical support (technology access)
-

Regional Model and Benefits

The virtual approach allows districts to:

- Participate in high-quality training as minimal cost to districts
 - Increase access to approved training for rural and smaller districts
 - Promote collaboration and shared learning among board members
 - Ensure consistent, high-quality governance training statewide
-

Scheduling and Customization

CES will work collaboratively with NMSBA and participating districts to:

- Schedule training dates
 - Customize examples and scenarios to regional or district contexts
 - Adjust pacing to meet participant needs while maintaining NMPED compliance
-

Conclusion

CES is committed to strengthening school board governance across New Mexico through **intentional, compliant, and meaningful professional learning**. This virtual training model provides districts with a streamlined solution to meet NMPED requirements while deepening board members' understanding of their critical role in student success.