

New School or School Site Amendment Request

Purpose

The *New School Amendment Request* is used to add a new charter school or school site to the existing contract. The request must be submitted timely so that it may be processed within the timeframe provided in the PEC policy and implemented starting at the beginning of the next fiscal year (consideration at the January meeting is the latest possible consideration for a new school or school site amendment to become effective in the next fiscal year). The addition of a new school or school site is not effective until approved by the PEC.

Determining Eligibility

To determine whether your charter school is eligible to expand (add a new school or school site) using the Amendment Process, review the academic performance of the school. The new school or school site expansion process is open to any charter school if the school has:

- Been renewed at least once;
- Received no lower than a “B” letter grade in any of the past three years with no single indicator in the letter grade receiving a rating below “C” in the current year;
- Met each of its mission specific goals in each of the last three years;
- Has not had its board of finance revoked within the last three years;
- Has maintained at least 75% student retention within and between school years in each of the last three years;
- Annually, the school has a ratio of 3 applications for every 1 student vacancy. Student vacancies are calculated by identifying the number of vacancies at the school in any year that are filled by new students who *are not* siblings of currently enrolled students;
- Informed the school district in which the school is seeking to locate the new school or school site, on or before January 15th, of the intention to open a new school in the district;
- With the participation of the PEC, held a community input hearing in the district in which the school is seeking to locate the new school or school site; and
- Is seeking to open a new school or school site located in the same district as the current school.

OR

Has received a discretionary waiver from the Secretary of Education to locate in a different district.

Submission Window

New School Amendment Requests may only be submitted for consideration at the September through January PEC meetings to go into effect in the subsequent fiscal year.

PEC Consideration

A substantively complete amendment request submitted by a charter school that meets the eligibility criteria shall be placed on the agenda of a regular PEC meeting.

A finding that the Charter School is not in compliance in one or more operational areas (see page 5 of The Guide) may result in a delay in consideration of the request.

The most current academic data will be provided to the PEC for its consideration of the amendment request.

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A recommendation for approval from the CSD does not guarantee the request will be approved by the PEC. The PEC is the final decision maker and is not obligated to accept the recommendations of the CSD.

Please note, approval of this request may require negotiation of additional performance goals.

Staff Recommendation

A *New School Amendment Request* will receive a staff recommendation for the expansion if the Charter Holder's current data and performance demonstrates all of the following criteria.

Charter school has been renewed at least once;
Received no lower than a "B" letter grade in any of the past three years with no single indicator in the letter grade receiving a rating below "C" in the current year;
Met each of its mission specific goals in each of the last three years;
Has not had any multi-year repeat findings in any of the past three years;
Has received an unmodified audit opinion in each of the past three years;
Is not currently on monthly reporting with the School Budget and Financial Analysis Bureau that has been required for more than 1 year;
Has not had its board of finance revoked within the last three years;
Has maintained at least 75% student retention within and between school years in each of the last three years;
The school is currently at capacity and the waitlist from the beginning of the current year could fill 33.33% of the enrollment for the new school or school site that has been requested;
The school has fully addressed the prompts regarding staffing, curriculum, and facility submissions to support the expansion;
The current school performs at or above the average performance of a majority of schools within the proposed school's feeder pattern based on location.

Recommendation criteria will be used to determine whether or not the CSD will recommend the PEC approve the request. A charter school must fulfill all listed criteria to receive a CSD recommendation for expansion.

Instructions for the Request

If you have questions about completing the form or uploading documents, contact the Charter Schools Division by emailing charter.schools@state.nm.us. Work through the form, filling in all required fields and attachments (denoted by "*"). Be sure to save your work, even if you aren't prepared to submit your form, so that you do not lose your data.

Form Fields

Field	Instructions
Name of School*	Enter the name of the new school or school site.
Grade levels to be served*	Check the boxes for the grades to be served by the new school or school site. The grades must be currently approved for the charter or the application must be accompanied by a Grade Level Amendment Request.

First day of Operation* Enter the proposed first day of school for the new school or school site.

Attachments

For further information regarding specific documentation requirements, see pages 6–15 of The Guide and the administrative and substantive completeness requirements starting on page 4 of these instructions.

Approved Board Minutes*

Attach evidence that the proposed change has been approved by the Charter school board.

Narrative*

Upload a narrative that responds to the following prompts:

- Describe the rationale for this request.
- Provide a detailed staffing plan consistent with each Staffing Chart submitted with this request. Describe how the staffing (administrative, instructional, and non-instructional), enrollment, and target population needs will be addressed by the following processes:
 - Recruitment;
 - Hiring; and
 - Training.
- If changes to staffing are not needed, provide an explanation.
- Identify the target population of the proposed school, and demonstrate a clear understanding of the following:
 - The students the proposed school intends to serve;
 - How the population is similar to, or different from, the population currently served by the school(s) operating under the charter;
 - Whether the students will be primarily neighborhood or commuter;
 - A demographic profile of the population;
 - Current levels of academic performance for the target population; and
 - Needs not currently met for the target population.
- Describe how the school will provide a quality academic option and/or a unique program of instruction that is currently unavailable to the target population and how it will meet the needs of the target population.
- Identify the number of overall instructional hours the school will provide.
- Provide a detailed description of how the charter school will meet the enrollment targets identified in the Enrollment Matrix. Include the following:
 - A plan for meeting targets;
 - Necessary advertising and/or promotion to meet the targets;
 - The timeline for enrollment at the proposed school, and explains the process for communicating to the public.
- Provide a description of the market analysis that supports the successful enrollment of the projected student count. Include the following:
 - Other educational options available to students in the target area;
 - An explanation of need for the school; and

- Factual data to support the need.
- Identify the concrete resources, if any, needed for implementation. Consider the changes needed to curriculum, assessment, and instruction to implement this request. Provide the rationale for your response. If the response indicates that resources are not needed to implement the request, explain why.
- The first payment for a school year is not distributed until July 1st of the Fiscal Year. Explain how the school will manage all expenses prior to receiving this initial payment, including, but not limited to, those already identified in the staffing and resource components of the narrative. Include the following, as applicable:
 - Recruiting, hiring, and training employees
 - Advertising and/or promoting the school
 - Enrolling students
 - Purchase of concrete resources
 - Facilities
 - Other items as indicated by the request
- Describe in detail the process the school has uses to identify potential facilities/properties and **identify at least one appropriate, viable facility/ property in the targeted geographic location**. Provide a **clear plan** to prepare the facility/property in time for the proposed school’s opening, including a reasonable estimate and description of capital outlay needs and how the project will be funded. The response should:
 - Demonstrate the school has:
 - Conducted outreach and research to understand if there are public facilities that are available, appropriate, and viable
 - Researched multiple facilities or properties in the targeted geographic location to identify all facilities or properties that are available, appropriate, and viable
 - Identified whether or not each potential property will meet the requirements of NMSA 1978 § 22-8B-4.2, including occupancy, adequacy, and ownership
 - Identify at least one potential facility or property that is appropriate, viable, and located in the targeted geographic location
 - Identify a plan that would enable the applicant to prepare the facility/property to meet the facility needs of the proposed school in time for the proposed school’s opening date, include specific action steps, timelines, responsible parties, and capital outlay needs
 - Identify how the project to prepare the facility will be funded

Additional Information

Attach each of the following documents:

- Enrollment Matrix*
 - Complete for the current school, detailing the current and targeted number of students served per grade for the subsequent three Fiscal Years. Additionally, complete the matrix for the proposed school for its first three Fiscal Years.
- Staffing Chart*
 - Complete for the current school, identifying the current and anticipated staffing information for the subsequent three Fiscal Years. Additionally, complete the chart for the proposed school in its first three Fiscal Years.
- Certified copy of the currently operating school’s enrollment information from the beginning of the current year enrollment period, including vacancies and applications.
- Certification that the new school or school site is located in the same district as the current school

OR

Copy of the discretionary waiver from the Secretary of Education to locate in a different district.

- Transcript from the community input hearing in the district in which the school is seeking to locate the new school or school site.

Administrative Completeness Review

An administratively complete request is submitted by a school that meets all eligibility criteria and includes the following:

- Approved Board Minutes
 - Comply with Open Meeting Law
 - Board aligns with what is currently on file with PEC/CSD
- Narrative, addressing all prompts
- Completed Enrollment Matrix for each school operated or proposed
- Completed Staffing Chart for each school operated or proposed
- Certified copy of the currently operating school's enrollment information from the beginning of the current year enrollment period, including vacancies and applications.
- Waiver and Community Input Hearing Documentation (if applicable)

Substantive Completeness Review

The following checklist will be used to determine substantive completeness for this request. Each criterion (if applicable) will either be deemed acceptable or not acceptable.

Review	Criteria
Approved Board Minutes	Approved Board Minutes that: <ul style="list-style-type: none"> <input type="checkbox"/> Indicate that the request has been approved by the appropriate board and is consistent with the submitted form.
Rationale (Narrative)	Description includes the following: <ul style="list-style-type: none"> <input type="checkbox"/> Rationale for adding a new school; and <input type="checkbox"/> Rationale is consistent with information contained in all applicable narrative prompt responses and accompanying attachments.
Staffing Chart	<ul style="list-style-type: none"> <input type="checkbox"/> Completed Staffing Charts are provided for the currently operated school and the proposed school. <input type="checkbox"/> Staffing Charts include a leadership section for the currently operated school and the proposed school. <input type="checkbox"/> Staffing Charts are consistent with information contained in all applicable narrative prompt responses and accompanying attachments.

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<p>Staffing Plan (Narrative)</p>	<p><input type="checkbox"/> Plan describes changes to instructional, non-instructional, and administrative staff in the Staffing Charts.</p> <p><input type="checkbox"/> Staffing, enrollment, and target population needs are addressed by the following processes:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Recruitment; <input type="checkbox"/> Hiring; and <input type="checkbox"/> Training. <p><input type="checkbox"/> If no changes to staffing, the plan describes why there are no needed changes.</p> <p><input type="checkbox"/> Staffing Plan is consistent with the information contained in all applicable narrative prompt responses and accompanying attachments.</p>
<p>Target Population (Narrative)</p>	<p>Response includes the following:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Identification of the target population; <input type="checkbox"/> How the target population is similar to, or different from, the current population served by the charter; and <input type="checkbox"/> Whether the population will be primarily neighborhood or commuter students. <p>Response provides the target population's:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Demographic profile; <input type="checkbox"/> Current levels of academic performance (e.g. PARCC information and letter grades); and <input type="checkbox"/> Needs not currently met. <p><input type="checkbox"/> Target population information is consistent with information contained in all other applicable narrative prompts and accompanying attachments.</p>
<p>Quality Option or Unique Program of Instruction (Narrative)</p>	<p>Description includes:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Reason(s) the school provides a quality academic option; or <input type="checkbox"/> Reason(s) the school provides a unique program of instruction. <p><input type="checkbox"/> If both apply, both have been addressed.</p> <ul style="list-style-type: none"> <input type="checkbox"/> How these reasons meet the needs of the target population. <input type="checkbox"/> Description is consistent with information contained in all applicable narrative prompts and accompanying attachments.
<p>Instructional Days (Narrative)</p>	<p><input type="checkbox"/> The number of instructional days is identified.</p>
<p>Enrollment Matrix</p>	<ul style="list-style-type: none"> <input type="checkbox"/> An Enrollment Matrix is completed for the current and subsequent three Fiscal Years for the currently operated school, as well as for the proposed school. <input type="checkbox"/> Each Enrollment Matrix is consistent with information contained in all applicable narrative prompts and accompanying attachments.

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<p>Enrollment Targets (Narrative)</p>	<p><input type="checkbox"/> Description of enrollment is consistent with the targets identified in each Enrollment Matrix submitted.</p> <p>Description includes the following:</p> <ul style="list-style-type: none"> <input type="checkbox"/> A plan for meeting targets; and <input type="checkbox"/> Necessary advertising and/or promotion to meet the targets. <p><input type="checkbox"/> Description of the market analysis, to include the following:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Other educational options available to students in the target area; <input type="checkbox"/> An explanation of need for the school; and <input type="checkbox"/> Factual data to support the need. <p><input type="checkbox"/> Timeline for enrollment at the proposed school is included and explains how it will be communicated to the public.</p> <p><input type="checkbox"/> Description is consistent with information contained in all applicable narrative prompts and accompanying attachments.</p>
<p>Resources (Narrative)</p>	<p>Concrete resources are identified for the following areas:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Curriculum; and/or <input type="checkbox"/> Assessment; and/or <input type="checkbox"/> Instruction. <p><input type="checkbox"/> Rationale includes why these resources are needed, or why additional resources are not needed to implement the request.</p> <p><input type="checkbox"/> Identified resources are consistent with information contained in all applicable narrative prompts and accompanying attachments.</p>
<p>Management of Expenses (Narrative)</p>	<p>A viable and adequate plan for managing all initial expenses, to include the following:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Recruiting, hiring, and training employees (if applicable) <input type="checkbox"/> Advertising and/or promoting the school (if applicable) <input type="checkbox"/> Enrolling students (if applicable) <input type="checkbox"/> Purchase of concrete resources (if applicable) <input type="checkbox"/> Facilities (if applicable) <input type="checkbox"/> Other items as indicated by the request (if applicable) <p><input type="checkbox"/> Start-up Plan is consistent with information contained in all applicable narrative prompts and accompanying attachments.</p>

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<p>Facility (Narrative)</p>	<p>Describe in detail the process the school has uses to identify potential facilities/properties, to include the following:</p> <ul style="list-style-type: none"> <input type="checkbox"/> How the school has: <ul style="list-style-type: none"> o Conducted outreach and research to understand if there are public facilities that are available, appropriate, and viable o Researched multiple facilities or properties in the targeted geographic location to identify all facilities or properties that are available, appropriate, and viable <ul style="list-style-type: none"> • Identified whether or not each potential property will meet the requirements of NMSA 1978 § 22-8B-4.2, including occupancy, adequacy, and ownership <input type="checkbox"/> Identify at least one potential facility or property that is appropriate, viable, and located in the targeted geographic location <input type="checkbox"/> Identify a plan that would enable the applicant to prepare the facility/property to meet the facility needs of the proposed school in time for the proposed school’s opening date, include specific action steps, timelines, responsible parties, and capital outlay needs <input type="checkbox"/> Identify how the project to prepare the facility will be funded
<p>Currently Operating School’s Enrollment Application and Vacancy Data</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Copy is certified <input type="checkbox"/> Demonstrates the school received at least 3 applications for every 1 vacancy during enrollment period <input type="checkbox"/> Student vacancies are calculated by identifying the number of vacancies at the school in any year that are filled by new students who are not siblings of currently enrolled students
<p>Community Input Hearing Documentation</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Community Input Hearing was held with participation of the PEC <input type="checkbox"/> Community Input Hearing, while it may demonstrate some opposition to the new school or new school site, also demonstrates that there is community support and desire for the new school or school site
<p>Waiver Documentation (if applicable)</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Secretary of Education has granted a waiver allowing the school to add an additional school (new school or school site) in a different district