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SECRETARY OF EDUCATION

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GOVERNOR

August 16, 2021

Dear Public Education Commissioners:

Enclosed is the Final Analysis and Recommendation on the THRIVE Community School 2021 Charter School Application. THRIVE is applying for a state charter in Santa Fe, New Mexico, within the boundaries of Santa Fe Public School District to serve grades K-8 and represented by founders, Sean Duncan, Dr. Angelia Moore, Julie Lucero, and Amy Chacon.

The attached Final Analysis and Recommendation includes a summary of the evidence and rationale gathered from the peer review team's analyses of the written application and the capacity interview. It also includes a brief summary of the participation at the community input hearing and letters (in support or in opposition) received. Appendix A contains all of the correspondence received regarding the school, from the Community Input Hearing date on Thursday July 22, 2021 until the submission deadline, three days later.

Thank you all for your hard work and dedication to ensure that New Mexico's Charter Schools represent the best of alternative and innovative options for parents and students.

Sincerely,

*Corina Chavez*

Corina Chavez, Director  
Options for Parents and Families Division

## I. Recommendation

APPROVE

Overall the application is complete and adequate; and during their Capacity Interview, the applicant(s) demonstrated a clear capacity to implement the academic, organizational and financial management plans as described in the application. Nothing was identified that would indicate the applicant(s) do not have the experience, knowledge, and competence to successfully open and operate a charter school.

APPROVE WITH CONDITIONS

Overall the application is complete and adequate; and during their Capacity Interview, the applicant(s) demonstrated a general capacity to implement the academic, organizational and financial management plans as described in the application. However, the Charter Schools Division (CSD) has identified some specific concerns that would need to be addressed during the planning year. The CSD has listed the noted concerns and conditions to address the concerns below. If the PEC determines that there are any additional conditions that need to be addressed, those should be noted during the public hearing and all approved conditions negotiated in the final contract.

### PROPOSED CONDITIONS

FOR ALL APPROVALS: The Applicant will negotiate a contract with the Public Education Commission pursuant to 22-8B-9.1:

1. Obtain standing as an approved Board of Finance
2. Secure a facility that meets PSFA Approval
3. Complete the planning-year checklist

PROPOSED CONDITIONS SPECIFIC TO THRIVE:

1. Each board member obtain all required training hours, by the Charter Schools Division (CSD), within the first three months of approval.

DENY

Overall the application is either incomplete or inadequate; or during their Capacity Interview, the applicant(s) did not sufficiently demonstrate the experience, knowledge, and competence to successfully open and operate a charter school in New Mexico.

The Charter Schools Act, in paragraph 1 of Subsection L of Section 22-8B-6 NMSA 1978, states that a chartering authority may approve, approve with conditions or deny an application. A chartering authority may deny an application if:

- (1) the application is incomplete or inadequate;
- (2) the application does not propose to offer an educational program consistent with the requirements and purposes of the Charter Schools Act;
- (3) the proposed head administrator or other administrative or fiscal staff was involved with another charter school whose charter was denied or revoked for fiscal management or the proposed head administrator or other administrative or fiscal staff was discharged from a public school for fiscal mismanagement;
- (4) for a proposed state-chartered charter school, it does not request to have the governing body of the charter school designated as a board of finance or the governing body does not qualify as a board of finance; or

- (5) the application is otherwise contrary to the best interests of the charter school’s projected students, the local community or the school district in whose geographic boundaries the charter school applies to operate.

## II. Overall Score Sheet

Section	Meets the Criteria	Approaches the Criteria	Does Not Meet the Criteria
<b>APPLICATION</b>			
• Education Plan / Academic Framework	14	2	1
• Organizational Plan & Governance/Organizational Framework	16	7	1
• Business Plan / Financial Framework	1	7	0
• Evidence of Support	3	0	0
<b>CAPACITY INTERVIEW</b>	24	3	0
<b>TOTALS</b>	<b>58</b>	<b>19</b>	<b>2</b>

**The School, Final Analysis and Recommendation from staff to PEC**

<b>SCHOOL</b>	Thrive Community School	
Section #	<b>WRITTEN APPLICATION (Part C)</b>	<b>Rating</b>
	<b>ACADEMIC FRAMEWORK</b>	
I.A.(1)	Mission	Meets
I.A.(2)	Vision	Complete
I.A.(3)	Uniqueness and Innovation	Meets
I.B.(1)	Mission Specific Indicators	Meets
I.C.(1)	Curriculum/Ed Program/Student Standards	Approaches
I.D.(1)	Bilingual Multicultural, Indian Education, and Hispanic Education	Meets
I.E.(1)	Graduation Requirements	Meets
I.F.(1)	Ed Philosophy/Instructional Methods	Meets
I.F.(2)	Yearly/Daily Calendar	Does Not Meet
I.F.(3)	Programs impact for population	Approaches
I.G. (1a)	SPED Identification	Meets
I.G. (1b)	SPED Progress	Meets
I.G. (2a)	ELL Identification	Meets
I.G. (2b)	ELL Progress	Meets
I.G. (3)	Plan to address the needs of students as outlined in the Indian Education Act, Hispanic Education Act, and the Bilingual Multicultural Education Act	Meets
I.H.(1)	Assessment Plan	Meets
I.H.(2)	Assessment Data	Meets
I.H.(3)	Assessment Communications	Meets

**The School, Final Analysis and Recommendation from staff to PEC**

ORGANIZATIONAL FRAMEWORK		
II.A.(1)	Governing Board Outline	Does Not Meet
II.A.(2)	Board Qualifications & Profiles	Approaches
II.A.(3)	New Member Process	Meets
II.B.(1)	Board Training	Approaches
II.B.(2)	Board Evaluation	Approaches
II.C.(1)	Board Oversight	Meets
II.C.(2)	Hiring Head Admin	Meets
II.C.(3)	Principal Job Description (Appendix B)	Meets
II.C.(4)	Principal Evaluation	Meets
II.D.(1)	Org Chart & Relationship	Approaches
II.D.(2)	Staff Job Descriptions (Appendix C)	Approaches
II.D.(3)	Staffing Plan	Approaches
II.D.(4)	PD/Novice Membership	Meets
II.E.(1)	Employment Terms	Meets
II.F.(1)	PTA	Meets
II.F.(2)	Grievance Process: Families	Meets
II.G.(1)	Recruitment Plan	Approaches
II.G.(2)	Lottery	Meets
II.H.	Conflict of Interest	Meets
II.I.(1)	3rd Party Relationships	
II.I.(2)	3rd Party Contracts (Appendix D)	
II.J.	Waivers	Meets
II.K.(1)	Transportation	Meets
II.K.(2)	Food Service	Meets
II.L.(1)	PSFA Checklist (Appendix E)	Meets
II.L.(2)	Facility Identification	Meets
FINANCIAL FRAMEWORK		
III.A.	School Size	Meets
III.B.(1)	SEG Worksheets (Appendix F in Excel)	Approaches
III.B.(2)	5 Year Budget (Appendix G in Excel)	Approaches
III.B.(3)	Budget Narrative	Approaches
III.B.(4)	Budget Adjustments	Approaches
III.C.(1)	Financial Oversight (Appendix H)	Approaches
III.C.(2)	Financial Staff	Approaches
III.C.(3)	Governance Finance	Approaches
EVIDENCE OF SUPPORT		
IV.A.(2)	Outreach Activities	Meets
IV.B.	Community Support	Meets
IV.C.	Networking Relationships	Meets

**The School, Final Analysis and Recommendation from staff to PEC**

	<b>CAPACITY INTERVIEW (Part D)</b>	<b>Rating</b>
1	Mission	Meets
2	Innovation	Meets
3	Mission Implementation	Meets
4	Leadership & Governance (GB selection & success of school)	Meets
5	Leadership & Governance (HA selection & success of school)	Meets
6	Leadership & Governance (GB and school evaluations & success)	Meets
7	Leadership & Governance (Relationship of founders, GB, and admin & success)	Approaches
8	Leadership & Governance (bylaws, implementation, & success)	Meets
9	Leadership & Governance (establish, implement, change policies and procedures)	Approaches
10	Facility (plan for facility and educational occupancy; responsible party)	Meets
11	Facility (next step plan if building does not get PSFA approval)	Meets
12	Finance (planning year budget without federal start-up funds)	Meets
13	Finance (enrollment projections)	Meets
14	Finance (plan if actual enrollment is below projections)	Meets
15	Planning Year (organizational steps during planning year)	Meets
	<b>School Specific Questions</b>	
16	How will you measure your success in effectively meeting your mission?	Meets
17	How will your school's use of the RULER method and restorative justice practices align with your mission?	Meets
18	While vision and long term planning for the school is very strong, can you provide vision for the future?	Meets
19	If restorative practice is truly embedded into your educational philosophy and framework, how will you measure success?	Meets
20	When designing the schedule and calendar for your school, which stakeholders (parents, staff, students) are most involved?	Meets
21	What would constitute removal from the board? What is the protocol for missing meetings?	Meets
22	Does Thrive School fully understand what it means to be a board of finance in terms of budgeting and financial reporting?	Meets
23	Will you be providing board members with site reports, audit findings, and a copy of the budget?	Approaches
24	Will the preparation of grant reports provided by The Vigil Group include the month of the year?	Meets
25	How will the allotted amount of PD days match the school calendar?	Meets
26	What is the long term, phased in plan for the school growth overtime?	Meets
27	Will the preparation of grant reports provided by the Vigil Group include the month of the year?	Meets

### **III. Explanation Regarding Use of the Score Sheet**

An external team of four peer reviewers provided the written application and capacity interview evaluations and scoring. The peer review team consists of:

- A licensed NM School Administrator
- A licensed NM Teacher
- A licensed NM School Business Official
- A Team Leader with charter policy, team lead, or administration experience

In this Recommendation and Final Analysis, the CSD has considered the written application and the responses during the capacity interview, as rated by the peer reviewers.

The community input hearing is not rated. However, a brief summary is provided on page 8. Please see the full transcript for details.

The letters of support/opposition are also not rated. A summary is provided here and the actual letters/emails are provided in Appendix A, beginning on page 10.

## IV. Final Analysis

### WRITTEN APPLICATION (PART C)

#### Application Section

##### EDUCATION PLAN/ACADEMIC FRAMEWORK

**The applicant scored “Meets Criteria” in fourteen (14) indicators, “Approaches the Criteria” in two (2) indicators, and “Does Not Meet the Criteria” in one (1) indicator.** Please see the detailed comments from the peer review team, along with the rating, after each question in Part C of the application.

*The academic framework provided in the application is robust with an emphasis on special education needs of students. The founding team did an excellent job of articulating the instructional model with curriculum. Their strong plan is supported by their strong team. The majority of the founding team are both licensed educators and experienced in Special Education.*

#### Application Section

##### ORGANIZATIONAL PLAN AND GOVERNANCE / ORGANIZATIONAL FRAMEWORK

**The applicant scored “Meets Criteria” in sixteen (16) indicators, “Approaches the Criteria” in seven (7) indicators, and “Does Not Meet the Criteria” in one (1) indicators.** Please see the detailed comments from the peer review team, along with the rating, after each question in Part C of the application.

*The organizational framework as presented in the application was the only area in which a “does not meet” rating was given. There were concerns regarding the rights of future board members being removed from board service. The Peer Review team asked questions about this issue during the capacity interview and found the applicants responses to be clear and satisfactory in addressing their concerns. The applicant team has already established the role of board president and was very focused on ensuring all peer review teams concerns were addressed.*

#### Application Section

##### BUSINESS PLAN/ FINANCIAL FRAMEWORK

**The applicant scored “Meets Criteria” in one (1) indicators, “Approaches the Criteria” in seven (7) indicators, and “Does Not Meet the Criteria” in zero (0) indicators.** Please see the detailed comments from the peer review team, along with the rating, after each question in Part C of the application.

*In terms of the financial framework, the team clearly understands the recruitment goals they need to reach, however, the phase-in plan for adding grades was unclear and in need of more definition. The applicant team is working with the Vigil Group, however, the SEG Worksheets, 5-Year Budget, Budget Narrative, and Budget Adjustment plans all need more work and clarity. The application fell short in*



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*ensuring robust oversight of the budget and budgeting process by the proposed schools board.*

**Application Section**

**EVIDENCE OF SUPPORT**

**The applicant scored “Meets Criteria” in three (3) indicators, “Approaches the Criteria” in zero (0) indicators, and “Does Not Meet the Criteria” in zero (0) indicators.** Please see the detailed comments from the peer review team, along with the rating, after each question in Part C of the application.

*Evidence of support was abundant and broad for THRIVE Community School. The applicant team networked with a variety of community organizations to build partnerships that could provide support the intended student population.*

**CAPACITY INTERVIEW (Part D)**

**The peer reviewers asked fifteen standard questions (#1-15) and thirteen school specific questions. The applicant scored “Meets Criteria” on twenty four (24) responses, “Approaches the Criteria” on three (3) responses, and “Does Not Meet the Criteria” on zero (0) responses.**

Please see the detailed comments from the peer review team, along with the rating, in Part D of the application.

**COMMUNITY INPUT HEARING**

During the community input hearing held on July 20, 2020 via Zoom, the majority of the attendees expressed support of the school. A representative of the Santa Fe Public School District both attended the hearing and submitted a letter to state opposition to the proposed school. Twenty one (21) attendees spoke, all in favor. The attorney for the Santa Fe Public School District was also in attendance but did not speak.

In addition to the eight (8) members of the applicant team, one individual from their team signed in as an attendee due to the fact that they were not able to commit to the entire length of the hearing.

**LETTERS OF SUPPORT OR IN OPPOSITION**

Twenty one (21) email messages were received by the deadline of three business days after the applicant’s Community Input Hearing with the PEC. All expressed support of THRIVE Community School. Four (4) letters of opposition were received.

The correspondence received is attached here, in Appendix A, in their entirety.

**SUMMARY**

In general, the peer review team was impressed by the proposed model. The focus on the variety of special needs students in their community and the incorporation of restorative justice in to the fabric of the proposed school was well articulated and evident in the school’s proposed mission and vision. A number of established community groups who focus on meeting the needs of underserved and marginalized students in Santa Fe spoke out in favor of the proposed school, eager to have a new partner in supporting stronger outcomes for their community.

Overall, the application submitted by TRIVE Community School is both complete and adequate. There is more work to be done to hone the policies and procedures of the proposed school and the applicant team has expressed an eagerness to partner with the PEC and the CSD to get that done.

During both the application review process and the capacity interview, the applicant team demonstrate the capacity to implement the education plan, organizational plan and governance (organizational framework), and the business plan (financial framework). The applicant team is prepared to open a high quality charter school in New Mexico.

## APPENDIX A

### Letters of Support or in Opposition