New Mexico Public Education Commission

2024 New Charter School Application Kit

Part A

Introduction, Instructions & Evaluation Rubric

DRAFT: December 15, 2023, Work Session

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Introduction

The *New Mexico Charter School Application Kit* was developed to provide guidance in the writing and review of new charter school submissions. The target audience for this document is both the founding group (the applicant team), as they develop a charter school application, and the Authorizer—the Public Education Commission (PEC), Authorizer's designee(s), or Authorizer's legal counsel (collectively referred to as "Authorizer"), as they review and evaluate the quality and completeness of the application.

The New Mexico Charter Schools Act provides the following policy statement:

> The Charter Schools Act is enacted to enable individual schools to structure their educational curriculum to encourage the use of different and innovative teaching methods that are based on reliable research and effective practices or have been replicated successfully in schools with diverse characteristics; to allow the development of different and innovative forms of measuring student learning and achievement; to address the needs of all students, including those determined to be at risk; to create new professional opportunities for teachers, including the opportunity to be responsible for the learning program at the school site; to improve student achievement; to provide parents and students with an educational alternative to create new, innovative and more flexible ways of educating children within the public school system; to encourage parental and community involvement in the public school system; to develop and use site-based budgeting; and to hold charter schools accountable for meeting the department's educational standards and fiscal requirements. (22-8B-3 NMSA 1978 *et seq*.).

Starting a new charter school in New Mexico requires proposals from committed individuals who have the capacity to achieve strong, educational outcomes. Through charter schools, the PEC, as Authorizer, and the Charter Schools Division (CSD) in the New Mexico Public Education Department (PED) seek to provide families with effective, quality educational options. The PEC makes the final determination regarding the application after reading the application, hearing from the applicants and the local community, and considering the information provided by the peer review team and the CSD.

Overview of the Review Process

Each year, the PEC approves and makes available, in writing at its office and on its website, a new charter school application kit for a specified fiscal year. The PEC-approved application kit for a new charter for the current application cycle includes templates and attachments approved by the PEC.

Technical Review—CSD staff will confirm whether the applicant team has met all requirements and whether the application kit contains all components required by statute, rule, and application instructions. An application kit will pass the technical review if:

1. The applicant team timely submitted a Notice of Intent no later than the second Tuesday of January of the year in which an application will be filed, to the PEC and the district in which the proposed school will be located;

2. The application kit contains complete information for each application component, including an Executive Summary, all completed narrative sections, and all required exhibits, attachments, appendices, including the 910B5 SEG worksheet and a five-year Budget Plan.

Failure to meet the criteria above will result in the application being deemed incomplete. The application will be evaluated based on the information that is included when it is submitted.

Templates and attachments must not be altered from the approved content, format, and sequence. An application kit submitted for a new charter will be deemed incomplete if it contains modifications to the content, format, or sequence of the application, templates or attachments or if it contains templates or attachments that were approved for use in a prior fiscal year.

Applicants will receive written notification of the deficiencies not more than five business days after the submission of the application kit. If the application is deemed incomplete, the Applicant's file will be closed. The applicant team may, within five business days of receiving the notice of an incomplete application, request a review by the PEC at its next regularly scheduled meeting. No new information and no additional submissions will be accepted or reviewed by the PEC or CSD.

Review—Applications will be evaluated and rated using the Evaluation Rubric, which is included in this document, Part A. An external peer review team will review each application. The review team consists of New Mexico Charter School experts who are overseen by the CSD. Each peer review team member will review each new charter application kit independently and thoroughly. Once complete, the peer review team will come together to discuss the application package and provide a consensus score, reasoning and analysis. This preliminary analysis will be provided to the applicant team and the PEC. The CSD has the ability to review scores for uniformity between applications assessed at the same time and review teams reviewing applications at the same time.

Capacity Interview—The peer review team will interview the applicant team. The questions are designed to determine the applicant team's capacity to implement the charter school proposed in the application and to provide an opportunity for the applicant team to clarify any weaknesses identified in the application preliminary review. The Application rating and analysis, along with a rating and analysis of the Capacity Interview, will form the basis for the CSD's analysis to the PEC. (See Part D below.)

Community Input Hearing—The PEC holds a public hearing at which the applicant team has an opportunity to answer the PEC's questions. During the hearing, the PEC also has a chance to hear from the community and to learn about the positives and negatives for potentially opening a school like the one proposed (NMSA 22-8B-6(K)). The PEC will ask the applicants to respond to questions on the application during the Community Input Hearing. The applicant team may have the personnel with the technical expertise at the hearing (and should have experts present who were involved in completing the application kit). However, all applicant team members should demonstrate knowledge and understanding in all areas of the application.

CSD Analysis—The CSD utilizes information from the external peer review team consensus rating analysis, and capacity interview, along with analysis of the community input hearing to prepare materials for the PEC. The analysis is presented to the applicants and PEC at least two weeks prior to the August PEC meeting.

PEC Consideration—The PEC will read and evaluate all applications and make the final decision to deny, approve, or approve with conditions each application. The PEC reads and evaluates all applications. The PEC's decision is based on, but not limited to the following:

1. complete application submitted by applicant team;
2. external peer review team analysis;
3. capacity interview and the peer review team final scoring Evaluation Rubric and analysis;
4. community input hearing;
5. CSD analysis;

6. all clarifying information and statements provided by announced deadlines; and applicants' statements at the PEC July meeting.

Please contact the Charter Schools Division at charter.schools@ped.nm.gov or (505) 827-6909 with any questions regarding this process.

The New Charter School Application Kit

The New Charter School Application Kit contains four main parts, plus appendices. All parts of the kit comply with the amended Charter School Act, which requires charter schools' performance to be measured according to a framework of specific criteria. The application itself is organized by the framework.

Part A, the **Introduction, Instructions and Evaluation Rubric** provides applicant teams with information regarding instructions, application timelines, contact information, an application glossary of terms, logistical information, and the Evaluation Rubric. The overall ability of the applicant team to create a clear, cohesive, comprehensive, reasonable, and innovative charter school application depends in large part on following the instructions and Evaluation Rubric in Part A.

Part B, the **Executive Summary** requires the applicant to provide an overview of the proposed school. This offers the reviewers a general understanding of what is described in detail in the application. This summary will be posted on the CSD website so that the public knows who is applying for a state-funded public charter school. This section is not evaluated for points. However, the summary should adequately reflect what is found in the rest of the application. It will be submitted along with Part C between May 1 and June 1 at 5:00 PM Mountain Time of the current year.

Part C, the **Written Responses** requests information from the applicant team that should be responded to completely. The Evaluation Rubric should guide the applicant team's responses. It is important not to compartmentalize responses but to use the prompts to present a clear, comprehensive, cohesive, reasonable, and innovative educational, organizational, and financial framework for the proposed public charter school. The peer reviewers and CSD will be looking for a consistent narrative that presents evidence of a thorough and thoughtful plan, formulated by a capable team, deserving of being entrusted with millions of dollars of public funds, and which will offer a vibrant and innovative educational option for New Mexican children and their families. The proposed school's mission should be reflected throughout the Application in all proposed curriculum, programs, budgets, and resource allocations. **Note**: Simply following the prompts does not guarantee approval by the PEC.

Part D, the **Capacity Interview Questions and Rubric** does not require any written information from the applicant team. Applicant teams will be asked approximately 15-20 questions that will allow them to showcase the applicant team's capacity to implement the framework for the charter school outlined in the application.

Appendices:

   A. Governing Body Bylaws
   B. Head Administrator Job Description
   C. Job Descriptions for Certified, Licensed, and Other Key Staff
   D. Proposed Agreements Governing Third Party Relationships and Memoranda of Understandings (MOUs) (required if applicable)
   E. PSFA-Approved Projected Facility Plan Documentation
   F. Five Years of 910B5 State Equalization Guarantee (SEG) Computation Revenue Estimates
   G. Five-year Budget Plan

H. Internal Control Procedures

Summary

Experience has shown that successful charter schools tend to have a number of common characteristics such as:

- A clear, focused, results-oriented, measurable mission statement that aligns to all parts of the proposal
- A demonstrated understanding of the charter school's projected students, based on the local community or the school district in whose geographic boundaries the charter school applies to operate
- An educational program that is likely to be effective for the school's projected students, based on the local community or the school district in whose geographic boundaries the charter school applies to operate
- Strong goals to assist the school in meeting its mission and educational programming in an equitable way
- Strong, experienced, and diverse leadership and governance that aligns the mission of the school with results-oriented, measurable practice
- A Governing Body that provides strong, professional functions in financial oversight, Board functions, and supporting the leadership of the school
- Strong financial planning and management
- A school that demonstrates support and ownership of the school by the local community, not just the applicant team

The PEC expects thoughtful, well-developed applications from capable school developers who are committed to enhancing education in New Mexico. All successful applicants shall: 1) enter into a planning/implementation year including required monthly meetings, 2) complete a planning/implementation year checklist, and 3) negotiate a contract with the PEC prior to receiving approval from the PEC to commence operations. The templates used in the negotiations are available on PED's website.

Instructions and Timeframe

Notice of Intent	The Notice of Intent (NOI) must be submitted no later than the second Tuesday in January, on the form provided, to **both** the Public Education Commission and the local district where the proposed charter school intends to be located.
Technical Assistance Workshops	New Application Training Workshops will be provided by the CSD between January and May. Applicant teams that submit a timely NOI will be notified of the details, dates, times, and locations for all trainings via email. The CSD website for information regarding the Technical Assistance Workshops is: https://webnew.ped.state.nm.us/bureaus/options-parents-families/charter-schools/trainings-offered/). To RSVP, send participant's name, school affiliation, position, and email address to charter.schools@ped.nm.gov.

PSFA Facilities Master Plan	Applications must include evidence that the Public School Facilities Authority (PSFA) Master Plan has been completed. Form available on PSFA website, submitted to PSFA in April.
Deadline: Charter Application	Applications must be submitted by email to [charter.schools@ped.nm.gov. CSD requests that applications be submitted by May 24, 2024. Applications will not be accepted later than](mailto:charter.schools@ped.nm.gov) **June 1, 2024, 5:00 PM Mountain Time**.
Applications Provided to the PEC	All received applications will be transmitted to the PEC by June 5 after CSD checks for completeness
Substantive Review Period	An external peer review team of New Mexico charter school experts will read and analyze the applications in June. Each team is overseen by CSD staff.
Capacity Interviews	This interview, designed to demonstrate the applicant team's capacity to implement the school as described in the application, will take place the week of June 17.
Preliminary Analysis	The review team's preliminary analysis of the application and capacity interview is provided to the applicant team and the PEC by June 28.
Applicant Response	If applicants wish to submit a response to the preliminary analysis, they must do so by July 8, 2024.
Community Input Hearings	The PEC will hold hearings July 8-10 to allow the local community, including the local school district, the opportunity to provide comments on the application. The PEC will also use this opportunity to obtain information from the applicants that may inform the commissioners.
Public Written Comments	Community input may include written comments in favor of or in opposition to the application by members of the community and other interested individuals. Written comments shall be provided within three days of the school's community input hearing.
PEC Letter to Applicants	The PEC will inform applicants of their questions or concerns by July 16.
CSD Analysis and Recommendation	The CSD will send its analysis by email to the PEC and to the applicant by August 2.
PEC Decision-Making Meeting	The PEC will hold a public decision-making meeting on August 16 to: a) approve, b) approve with conditions, or c) deny the Application. At this meeting, the applicants will have an additional opportunity, prior to the decision, to address the PEC and to answer questions from the PEC members.

Glossary of Terms Relevant to the Application

Alignment of Curriculum, Educational Program, Student Performance Standards: The curriculum of all public schools must be aligned with the New Mexico Common Core State Standards, Content Standards, Benchmarks, and Performance Standards. An alignment document—by subject and grade level—lists each of the performance standards, cross- referenced with the instructional materials, and a timeline for when they are addressed.

Assessment: A valid formative and summative reliable method(s), tool(s) or system(s) to evaluate and demonstrate progress toward—or mastery of—the academic and non-academic performance goals stated in the application.

Charter Schools Act: The Charter Schools Act, 22-8B-1 et. seq. NMSA 1978, allows the authorization of charter schools that are independent public schools. Charter Schools operate under charters granted for up to five years by the Public Education Commission (PEC) or local school districts, known as Authorizers. Once an Authorizer has awarded a charter, the new charter school organizes around the mission, curriculum, theme, and/or teaching method described in its application. Charter schools are allowed autonomy, including control of their own budget, hiring their own employees, and other functions that the charter school is required to perform in order to carry out the educational program described in its charter. A charter school, on an annual basis, must demonstrate academic improvement, fiscal responsibility, and sound organizational operations that comply with the law.

In 2011, the Legislature amended sections of the Charter Schools Act to add and modify accountability requirements for charter schools and Authorizers. By using a Performance Contract and accompanying Performance Framework, charter schools have specific material terms they must meet. In addition, they are assessed by the indicators contained in the Performance Frameworks. The categories evaluated in the Performance Framework are Academic, Financial, and Organizational indicators. If the school is approved, the Authorizer negotiates terms of the Performance Contract, including mission-specific goals, with the charter school prior to the time that the school commences operations.

Instructional Hours: Hours in which regular students are in school-directed instructional programs, exclusive of lunch and breaks. This should include an example of a daily schedule in which the instructional hours will be fulfilled in order to visualize a typical day for students and teachers.

Mission: The mission of the school is a concise statement that describes the purpose of the school and how the school will achieve it. The mission should answer questions, such as: 1) what outcomes for students does the school seek to accomplish; 2) how will it accomplish those outcomes; and 3) what is unique about the school? The best mission statements are clear, focused, compelling, and have a focus on outputs rather than inputs. The statement should be the driving force and rationale behind all the other components of the application. There should be indicators throughout the application that show how the school will actualize the intended mission.

Mission-Specific Goals: The Amended Charter Schools Act requires that new charter applications include: the goals, objectives and student performance outcomes to be achieved by the charter school as well as a description of the charter school's plan for evaluating student performance, the types of assessments that will be used to measure student progress toward achievement of the state's standards and the school's student performance outcomes, the timeline for achievement of the outcomes and the procedures for taking corrective action in the event that student performance falls below the standards. (NMSA 22-8B-8(B)). This application requirement prepares the applicant team for the Performance Framework contents, which will be negotiated with the PEC if the proposed charter application is approved. Specifically, the performance framework shall allow for the inclusion of additional rigorous,

valid and reliable indicators proposed by a charter school to augment external evaluations of its performance, provided that the chartering authority shall approve the quality and rigor of such proposed indicators and the indicators are consistent with the purposes of the Charter Schools Act (NMSA 22-8B-9.1(c)).

New Mexico Common Core State Standards, Content Standards, Benchmarks, and Performance Standards: The State of New Mexico has established the Content Standards with Benchmarks and Performance Standards to be used by all public schools, including charter schools, and state-supported educational institutions to develop, deliver, and assess curriculum. New Mexico has adopted the Common Core State Standards. The NM Standards may be accessed at:

https://webnew.ped.state.nm.us/bureaus/instructional-materials/new-mexico-content-standards/

NM Standards: Refers to New Mexico Content Standards, Benchmarks, and Performance Standards

Partnership: A partner organization supports the implementation of the school's mission. A "partnership" is a formal relationship rather than an informal or tangential agreement to provide ancillary support to particular school programs through the commitment of funds or other resources to support the school's operation and long-term existence. According to Charter Law, a charter school is a public school that may contract with a school district or other party for provision of financial management, food services, transportation, facilities, education-related services or other services. The governing body shall not contract with a for-profit entity for the management of the charter school (NMSA 22-8B-4R).

Plagiarism: The practice of taking someone else's work or ideas and passing them off as one's own will not be tolerated. Be sure to credit authors and cite sources for any references in the application.

Plan/Process: A plan, for purposes of this application, is a detailed statement of how an outcome will be achieved. A plan could include, as appropriate: clear expectations, criteria, actions steps, monitoring steps, timelines, benchmarks, onboarding procedures, and responsible parties.

Policy: A policy, for purposes of this application, is a guiding statement that reflects the principles, rules, or guidelines to be adopted by the school's governing body once the charter contract is formally executed. Policy statements contain clear expectations, criteria, timelines, and responsible parties to be implemented on behalf of the governing body.

Procedure: A procedure, for purposes of this application, is a statement of the specific methods to be used or course of action that will be taken to implement a policy in the day-to-day operation of the school. A procedure identifies action steps, timelines, benchmarks, and responsible parties.

Remediation for students not achieving standards: Remediation, for purposes of this application, refers to a process, procedure, plan, or a variety of instructional support opportunities to assist individual students who are not achieving proficiency in the NM standards or other student performance expectations. There should be a detailed plan for how the school intends to provide a differentiated learning experience to support students in meeting their educational potential.

Replication of a charter school model: An applicant identifies that it is relying on a successful model from an existing school in New Mexico.[1] This is different from charter school replication, the practice of a single charter school board or management organization opening more than one school within the same

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[1] The existing charter school governing board will not be able to ultimately serve as the governing board of the new school pursuant to NMSA 22-8B-4B.

school district. An application to open a school replicating an existing charter school or replication of a model is not automatically approved solely because the existing schools using that model meet performance criteria and standards. Decisions for opening a new school that replicates an existing model are based on a number of factors, including the capacity to replicate and potential, community need for the charter school in the proposed location, as well as past academic, financial, and organizational performance of existing schools. The applicant must also provide a description of why the proposed charter school is in 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 (NMSA Section 22-8B-6.M.6).

Scope and Sequence: A scope and sequence should include the following components:

- Grade levels, grade spans, age spans, or other sequence
- The knowledge, content standards/areas or organizing themes within the grade levels, grade spans, age spans, or other sequence.
- The time/number of lessons/etc. spent to address specific knowledge, content standards/areas or organizing themes.
- Sufficient coverage of all grade level content standards/areas required by the state.

SMART Goals: Mission-Specific Goals must be:

- **Specific**. A well-defined goal must be specific, clearly and concisely stated, and easily understood. Educational goals should be tied to learning standards that specify what students should know and be able to do for each subject or content area and for each grade, age, or other grouping level.
- **Measurable.** A goal should be tied to measurable results to be achieved. Measurement is then simply an assessment of success or failure in achieving the goal.
- **Attainable.** A goal should be attainable and realistic.
- **Rigorous.** A goal should be challenging, based on current or expected performance.
- **Time-Specific with Target Dates.** A well-conceived goal should specify a timeframe or target date for achievement.

Special Populations: Special populations may include students who have been identified with special needs that require an Individualized Education Plan (IEP), a Section 504 Accommodations plan, English learner (EL) instruction, or those who require access to ancillary services including, but not limited to, health, speech/language services, social work services, physical therapy, occupational therapy, etc.

State and Federal Accountability System Academic Performance Indicator: The School Grading Accountability System is the first part of the academic framework that is used to evaluate all public schools, including charter schools, in the state of New Mexico. The NM System of School Support and Accountability Report includes criteria components such as Math and Reading Proficiency, Student Growth, English Learner Process, Science Proficiency, Chronic Absenteeism, Educational Climate, Graduation Rates, and College and Career Readiness (the latter two being appropriate for high school only). Understanding the State Accountability System is critical in the development of your school, as it is a major component of your school's annual evaluation.

Unique: Unique, for the purposes of this application, describes specific methods that are different and innovative, based on reliable research, effective practices, or demonstrably successful in schools with diverse characteristics, not currently available to students in the proposed geographic area. Compare and contrast with educational programs of other public schools that serve the same grade levels in that area.

Evaluation Rubric for Part C: Application

Rating: Along with each prompt, the application identifies the elements that must be present for a response to be evaluated as "Meets the Criteria." The following rubrics govern general rating practices. Please be sure that each response also completely addresses the bulleted points in the rubrics for each individual prompt.

Meets the Criteria	- All required elements present - Sufficient detail present, enabling the proposal to be implemented without requiring further proposal development - The proposal is reasonable and realistic - Fully consistent with other sections, including budget and mission - Fully consistent with all requirements of law - Coherent and easily understood
Approaches the Criteria	- The majority of required elements are present, but not all - Insufficient detail; further proposal development will be required before the applicant can begin to implement the concept - Minor inconsistencies with other sections of the application - May raise questions about legal compliance, but does not demonstrate non-compliance - May raise questions about reasonableness or viability of the proposal
Does Not Meet the Criteria	- None or less than a majority of the required elements are present - Contradicts or is substantially inconsistent with other sections - Insufficient detail to understand the proposal, which includes: - Copying responses from a prior applicant's application - Copying statutory, regulatory, or policy/guidance language - Plagiarizing information from other publicly available material - Includes statements that violate or conflict with the requirements of law - Incoherent or confusing - The proposal is patently unreasonable or unrealistic

I. Academic Framework

A. Mission and Vision

A. (1)	MISSION
Rating	**Expectations**
☐Meets	A complete response must
☐Approaches	• Identify how the proposed school will achieve its mission.

☐Does Not Meet	● Discuss the importance of the mission to your proposed community ● Be clear, concise, innovative, and measurable ● Discuss what mission success will look like

ENTER INDEPENDENT REVIEW TEAM COMMENTS HERE:

A.(2)	VISION STATEMENT
Rating	This narrative will be rated for completion, not content
☐Complete	A complete response must describe ● The team's reasoning and purpose
☐No Response	● Why your team is committed to providing a public education platform for your proposed community ● How your team intends to interact with your proposed community in order to provide their children with better academic outcomes ● What about your proposed program serves the proposed community in unique and innovative ways?

ENTER INDEPENDENT REVIEW TEAM COMMENTS HERE:

A. (3)	UNIQUENESS AND INNOVATION
Rating	Expectations
☐Meets	A complete response must ● Describe the uniqueness, innovation, and significant contribution of your educational program to the local NM public education environment;
☐Approaches	● Describe the needs of the community; and ● Demonstrate how the applicant team knows there is a compelling demand for the proposed school's educational program in the geographic area in which the school plans to locate.
☐Does Not Meet	● Ensure that the evidence establishes a compelling demand for the proposed school's educational program based on reliable research, effective practices, or demonstrated success in schools with diverse characteristics.

ENTER INDEPENDENT REVIEW TEAM COMMENTS HERE:

B. Mission-Specific Goals

B.	Mission-Specific Goals
Rating	Expectations
☐Meets	A complete response must ● Include two mission-specific goals;
☐Approaches	● Align to the student outcomes identified in the mission response (A.1.); ● Be guided by the elements of the SMART format:

	● Include measures and metrics.
☐Does Not Meet	● Include how the board of the proposed school intends to regularly monitor equitable mission success
ENTER INDEPENDENT REVIEW TEAM COMMENTS HERE:	

C. Curriculum, Educational Program, Student Performance Standards

C.	Curriculum, Educational Program, Student Performance Standards
Rating	**Expectations**
☐Meets ☐Approaches ☐Does Not Meet	A complete response must ● Describe the proposed school's curriculum *including research-based evidence that supports the effectiveness of the selected model and the target population*; ● Describe how the proposed school's curriculum will meet the requirements of equity for all underserved populations. ● Identify information that demonstrates how the curriculum will align with the New Mexico Common Core State Standards (CCSS) and New Mexico Content Standards; ● Identify information that demonstrates how the curriculum will align with the proposed school's mission; and ● Include a reasonable (as based on the professional judgment of experienced educators) timeline and plan for the development of the entire proposed curriculum—including scope and sequence, unit plans, daily lesson plans, project plans and rubrics, and unit and course assessments.
ENTER INDEPENDENT REVIEW TEAM COMMENTS HERE:	

D. Bilingual Multicultural Education, Indian Education, Hispanic Education and Black Education

D(1).	Bilingual Multicultural, Indian, Hispanic and Black Education Acts
Rating	**Expectations**

☐Meets	A complete response must ensure equal education opportunities for students in New Mexico by:
	● Addressing the goals of the Bilingual Multicultural Education Act (NMSA §22-23-1) including:
	   ○ providing students with opportunities to expand their conceptual and linguistic abilities and potentials in a successful and positive manner;
	   ○ teaching students to appreciate the value and beauty of different languages and cultures; and
	   ○ meeting state academic content standards and benchmarks in all subject areas.

☐Approaches	• Addressing the goals of the Indian Education Act (NMSA §22-23A-1) including:
	    ○ Ensuring equitable and culturally relevant learning environments and culturally relevant instructional materials for American Indian students
	    ○ Providing for the study, development and implementation of educational systems that affect the educational success of American Indian students to close the achievement gap, increase graduation rates;
	    ○ Encouraging and fostering parental involvement in the education of their children; and
	    ○ Providing mechanisms to improve educational opportunities for Native American students for the purpose of closing the achievement gap, increasing graduation rates, and increasing postsecondary enrollment, retention, and completion.

☐Does Not Meet	• Addressing the purpose of the Hispanic Education Act (NMSA §22-23B-2), including:
	    ○ Providing for the study, development and implementation of educational systems that affect the educational success of Hispanic students to close the achievement gap, increase graduation rates;
	    ○ Encouraging and fostering parental involvement in the education of their children; and
	    ○ Providing mechanisms to improve educational opportunities for Hispanic students for the purpose of closing the achievement gap, increasing graduation rates, and increasing postsecondary enrollment, retention, and completion.
	    ○ initiate and organize an equity council composed of multiple school stakeholders with the intent to create more equitable learning opportunities for marginalized students.
	• Address the purpose of the Black Education Act (HB 43), including:
	    ○ Developing and including anti-racism policies
	    ○ Developing curricula and instructional materials that recognize and teach black culture and anti-racism. Implementing anti-racism training for teachers and staff
	    ○ Opportunities to explore one's identity and societal systems that may impact their identity and future.

ENTER INDEPENDENT REVIEW TEAM COMMENTS HERE:	

D(2).	**Equity Plan** Proposed school will create an effective and equitable system of supports for all students focused on root-cause analysis, equity-focused leadership and continuous improvement, and culturally and linguistically responsive curriculum and pedagogy
Rating	**Expectations**
☐Meets	A complete response must ensure equal education opportunities for students in New Mexico by: • A plan to initiate and organize an equity council composed of multiple school stakeholders with the intent to create more equitable learning opportunities for marginalized students.
☐Approaches	• If the proposed school is to be located in a historically defined Indian impacted school district, a plan for conducting a needs assessment to determine what supports are needed in the public charter school, at home and in the community

	to help Indian students succeed in school, graduate with a diploma of excellence and be prepared to enter post-secondary education or the workplace.
☐Does Not Meet	● A detailed plan for the implementation of a culturally and linguistically responsive framework.
	● A detailed plan for attracting and retaining quality and diverse teachers to teach New Mexico's multicultural student population

ENTER INDEPENDENT REVIEW TEAM COMMENTS HERE:

E. Graduation Requirements

E.	Graduation Requirements.
Rating	**Expectations**

☐Meets
 	
☐Approaches
 	
☐Does Not Meet
 	
☐Not Applicable
	A complete response must
	● Identify all of the proposed school's graduation requirements;
	● Provide an explanation of how the proposed school will support students behind on graduation to earn a diploma.
	● Provide proposed Alternative Demonstration of Competency policies, if any
	● Align to state graduation requirements OR explicitly identify all requirements that vary from state minimum requirements; and
	● If there are variances from state minimum requirements explain the following:
	    o why the proposed school believes the change is important
	    o how the change supports the mission
	    o how the change ensures student readiness for college, career, or other post-secondary opportunities.

ENTER INDEPENDENT REVIEW TEAM COMMENTS HERE:	

F. Instruction

F.(1) Instruction	Teaching and Instructional Philosophy
Rating	**Expectations**
☐Meets ☐Approaches ☐Does Not Meet	A complete response must ● Describe the teaching and instructional philosophy of the proposed school; ● Identify primary instructional methods to be implemented that ensure equity and that align to the philosophy; ● Identify information that demonstrates the instructional methods are research-based; and ● Describe how the educational philosophy and instructional methods support and align to the mission and curriculum.

	● How the proposed instructional methods will best support the population the school intends to serve.

F.(2) Instruction	**Yearly Calendar and Daily Schedule**
Rating	**Expectations**

☐Meets
 	
☐Approaches
 	
☐Does Not Meet
	A complete response must
	● Include a yearly calendar that identifies the following:
	   ○ Annual start date and end date
	   ○ Teacher professional development days and times
	   ○ School-wide assessment periods
	   ○ School days, holidays, and partial days
	   ○ Teacher parent conferences;
	● Include a daily schedule that identifies the following:
	   ○ Instructional times
	   ○ Break times
	   ○ Start and end times
	   ○ Differences in the daily schedule for full and partial days;
	● Meet all minimum hour (total instructional time) requirements laid out in NMSA 22-2-8.1;
	● Describe how the calendar and schedule support the proposed school's educational program;
	● Describe how the calendar and schedule are optimal for achieving high outcomes for the anticipated student population;
	● Describe the extended learning time programs to improve academic success of students and professional learning of teachers;
	● If this is an elementary school, and you are participating in k-5 plus or extended learning program, describe the k-5 plus program and extended learning program and provide your calendar for year 2; and
	● Be supported by the proposed budget found in the Financial Framework section of the application.
	● Describe how the proposed calendar supports and values the community it intends to serve.

F.(3) Instruction	**How Instruction will be effective for the student population.**
Rating	**Expectations**

	A complete response must
☐Meets	● Identify the anticipated student population, including: 　　○ Demographic information based on the local community population 　　○ Educational proficiency based upon enrollment at the school 　　○ Attendance and truancy trends
☐Approaches	○ English language proficiency 　　○ Diverse populations 　　○ At-Risk populations 　　○ Special Educational needs; ● Explain any special factors influencing the makeup of the anticipated student population;
☐Does Not Meet	● Explain how the educational philosophy has been designed to meet students' needs; ● Explain how the instructional methods have been designed to meet students' needs and specifically how they will meet the needs of at-risk students; and ● Explain how the yearly calendar and daily schedule have been designed to meet students' needs. ● Explain how the yearly calendar and daily schedule have been designed to meet students' needs.

ENTER INDEPENDENT REVIEW TEAM COMMENTS HERE:

G. Special Populations

G.(1a)	**Instructional Services and Supports for Students with IEPs**
Rating	**Expectations**
☐Meets	A complete response must Describe how the proposed school will identify and provide: ● instructional supports and services to the spectrum of needs of students with disabilities, who have IEPs or are eligible for an IEP; ● instructional supports and services to gifted students who have IEPs or are eligible for an IEP; Describe how the proposed school will
☐Approaches	● Ensure that students who are ELs are not over-identified as students with disabilities; ● Identify specific responsibilities for school staff, classroom teachers, and special education staff; and ● Identify specific training and support that will be provided to teachers and school staff to ensure they are able to fulfill their responsibilities.
☐Does Not Meet	Describe the proposed school's: ● Timeline, benchmarks, and people responsible for developing discipline policies and protocols for your special populations. ● Capacity of the school district in the geographic boundaries of the proposed school to provide special education services and FAPE.

	● Process for tracking this protected population's progress and services, how that will be reported to the board.

G. (1b)	**Monitoring and Evaluation of Special Education Students**
Rating	**Expectations**
☐Meets ☐Approaches ☐Does Not Meet	A complete response must ● Describe how the proposed school will monitor the progress toward special education students' attainment of IEP goals; ● Identify specific responsibilities for school staff, classroom teachers, and special education staff; including when and who will be reporting on progress towards goals. ● Identify the regular intervals at which progress will be monitored and success will be evaluated; ● Identify specific actions/reporting that will engage and inform students and or families; and ● Describe how the school will evaluate the effectiveness of its special education program and services. ● Describe how mission success will be tracked, measured, ensured and reported on with these special populations.

G.(2)	**Required Curriculum and Instructional Supports for English Learners**
Rating	**Expectations**
☐Meets ☐Approaches ☐Does Not Meet	A complete response must ● Describe how the proposed school will identify English Learners (ELs) and provide the required curriculum and instructional services/supports to students identified as ELs; ● Identify how the school will implement the English Language Development Standards for ELs in its school; ● Identify how the school will provide ELs with instruction and support to develop English language proficiency; ● Identify how the school will provide ELs with access to grade-level content; ● Describe how the school will address the spectrum of needs that ELs may present; ● Identify specific responsibilities for school staff and classroom teachers; and ● Identify specific training, professional development and support that will be provided to teachers and school staff to ensure they are able to fulfill their responsibilities; ● Describe the proposed school's process for tracking this protected population's progress and services, how that will be reported to the board.

G.(2b)	Monitoring and Evaluation of English Learners
Rating	**Expectations**
☐Meets	A complete response must ● Describe how the proposed school will monitor the progress of ELs toward English language proficiency, both annually and within the school year; ● Identify specific responsibilities for school staff and classroom teachers;
☐Approaches	● Identify the regular intervals at which progress will be monitored; ● Identify specific actions/reporting that will engage students and/or families; ● Describe how the school will evaluate the effectiveness of its EL program and services; and
☐Does Not Meet	● Describe how the school will monitor exited EL students (reclassified fluent English proficient students—RFEPs) for two years for academic progress.

G.(3)	Plan to adhere to ESSA and State Statutes
Rating	**Expectations**
☐Meets	A complete response must Describe how the proposed school will: ● Develop an educational framework to address the educational needs of Native American, Hispanic, Black and bilingual multicultural students within a culturally and linguistically responsive approach to learning; ● Identify specific responsibilities for school staff and classroom teachers, including professional development for teachers;
☐Approaches	● Ensure that the best practices are used in teaching, mentoring, counseling and administration are culturally and linguistically responsive to students; ● Ensure policies will be culturally and linguistically responsive;
☐Does Not Meet	● Demonstrate rigorous and culturally meaningful curricula and instructional materials will be developed and implemented; ● Identify the regular intervals at which progress will be monitored; ● Identify specific actions/reporting that will engage students and/or families; and ● Evaluate the effectiveness of its programs to improve educational outcomes. ● Describe how the proposed school will meet the specific requirements of the Black Education Act

H. Assessment and Accountability

H.(1)	Assessment Plan
Rating	**Expectations**

	A complete response must
☐Meets	● Include an assessment calendar that identifies all state or district mandated assessment periods and dates related to teacher analysis/use of assessment data to inform instruction
	○ Include assessments/progress monitoring for special populations;
☐Approaches	● Identify, for all state or district mandated assessment periods, the grade levels at which the assessments will be administered;
	● Describe, for all state or district mandated assessment periods, the specific data that will be collected, reported, analyzed, evaluated, and utilized to inform instruction;
	● Describe how the data identified will be used to inform instruction;
☐Does Not Meet	● Describe the school's philosophy on the use of data and how teachers will be onboarded, trained and supported to ensure the schools philosophy is followed;
	● Align with all state assessment and data reporting requirements;
	● Describe how the assessment plan meets the specific needs to equitably assess the proposed school's projected student population;
	● Describe how the assessment plan aligns to the proposed school's mission and any assessments that may be used to determine, measure and track equitable mission achievement; and
	● Include any assessments that may be negotiated as part of the performance framework and contract.

ENTER INDEPENDENT REVIEW TEAM COMMENTS HERE:

H.(2)	**Plan for Data Assessment Analysis**
Rating	**Expectations**
☐Meets	A complete response must
	● Identify the processes the school will use, including specific action steps, triggers that would prompt action steps, responsible parties, timelines, and associated costs, to
	○ monitor academic performance and
☐Approaches	○ take appropriate corrective action if the school is not on track to or does not meet academic performance expectations;
	● Address specific responsibilities related to
	○ meeting student academic achievement or growth expectations at the school-wide level and
	○ meeting student academic achievement goals at the individual student level (remediation/at-risk student); and
☐Does Not Meet	● Describe how the school will regularly evaluate the effectiveness of its academic program generally and the effectiveness of specific corrective actions or interventions.
	● Describe how the proposed school intends to use the data gathered from assessments to drive instruction
	● Describe the board's role in analyzing the data gathered to inform school wide progress and potential changes.

ENTER INDEPENDENT REVIEW TEAM COMMENTS HERE:

H.(3)	Plan for Student Progress/Achievement & Communication Plan
Rating	**Expectations**

☐Meets
 	
☐Approaches
 	
☐Does Not Meet
	A complete response must
	● Identify how student achievement and progress will be communicated to
	   o Students
	   o Parents
	   o The governing body
	   o The authorizer
	   o The broader community;
	● Identify the communication plan for each of the specific sources of student achievement data identified in H.(1) and any other relevant sources of student achievement data; and
	● Provide information that demonstrates the plan is effective in reaching the targeted population and the specific community in which the school plans to locate.

ENTER INDEPENDENT REVIEW TEAM COMMENTS HERE:	

I. Replication of a charter school model (if applicable):

If the proposed program is the replication of a charter school model in use elsewhere, provide a list of the names and locations of schools in which the program has been implemented. Include student academic data that demonstrate the academic success of school(s) currently using the model. Include three years of applicable data. For schools open less than three years, or in the event that recent data has not yet been released, provide all achievement data available.

I.	Replication: data from existing schools using the model
Rating	**Expectations**
☐Meets ☐Approaches ☐Does Not Meet	A complete response must include a list of the names and locations of schools in which the program has been implemented and, for each identified school, for the past three years: ● Student performance data on a state or other accountability system demonstrating strong academic achievement and growth; ● Student enrollment data, including trends and variance between projected and actual enrollment; ● Graduation rates (if applicable); ● Annual authorizer reports; ● Narrative describing how the model would be successful in this community.
ENTER INDEPENDENT REVIEW TEAM COMMENTS HERE:	

II. Organizational Framework

A. Governing Body Creation/Capacity

A charter application shall include a description of the governing body and operation of the charter school, including: (1) how the governing body will be selected; (2) qualification and terms of members, how vacancies on the governing body will be filled and procedures for changing governing body membership; and (3) the nature and extent of parental, professional educator and community involvement in the governance and operation of the school (NMSA 22-8B-8(I)).

A.(1)	Key Components of Governance Structure
Rating	**Expectations**
☐Meets ☐Approaches ☐Does Not Meet	A complete response must ● Include governing body bylaws in **Appendix A**; and ● Summarize <u>key</u> governance components in the application response as follows: ○ Membership structure (number, roles, length of terms) ○ Officer structure (roles, election process, responsibilities, length of terms) ○ Committee structure that includes both legally required committees and school-specific committees (selection process, responsibilities, membership, length of service terms) ○ Member recruitment, selection, discipline, and removal processes.
ENTER INDEPENDENT REVIEW TEAM COMMENTS HERE:	

A.(2)	Governing Body Qualifications
Rating	**Expectations**
☐Meets ☐Approaches ☐Does Not Meet	A complete response must ● Identify all qualifications and skill sets that the governing body will require and ensure those are represented within its regular membership and how the proposed board would be able to ensure the long-term success of this school if, by some circumstance, the Founders were no longer involved. ● Explain why and how the identified qualifications and skills will ensure the governing body has the required capacity and enable the governing body to operate a successful, high-quality public school; ● Describe how the board will ensure robust board membership including training expectations, time commitments, and member onboarding. ● Include a list of all proposed initial governing body members, describe each proposed member's specific qualifications and skill sets through verifiable prior experience, and ensure the represented qualifications and skill sets align with the previously identified qualifications and skill sets that the governing body will require.

A.(2)	Governing Body Qualifications
Rating	**Expectations**
☐Meets ☐Approaches ☐Does Not Meet	A complete response must ● Identify all qualifications and skill sets that the governing body will require and ensure those are represented within its regular membership and how the proposed board would be able to ensure the long-term success of this school if, by some circumstance, the Founders were no longer involved. ● Explain why and how the identified qualifications and skills will ensure the governing body has the required capacity and enable the governing body to operate a successful, high-quality public school; ● Describe how the board will ensure robust board membership including training expectations, time commitments, and member onboarding. ● Include a list of all proposed initial governing body members, describe each proposed member's specific qualifications and skill sets through verifiable prior experience, and ensure the represented qualifications and skill sets align with the previously identified qualifications and skill sets that the governing body will require.

A.(3)	Selection of Governing Body Members
Rating	**Expectations**
☐Meets ☐Approaches ☐Does Not Meet	A complete response must ● Identify a regular and ongoing governing body recruitment process, including identification of action steps, timelines, and responsible parties; ● Describe the onboarding process, the board's role in chartering and re-chartering, authorizer relations, and time commitment.

B. Governing Body Training and Evaluation

B.(1)	Governing Body Training Plan
Rating	**Expectations**
☐Meets	A complete response must ● Identify a process for governing body member onboarding to ensure new members are properly trained and able to meet the obligations and fulfill the

☐Approaches	responsibilities of governing body service, include action & monitoring steps, timelines, and responsible parties; ● Describe how the plan will identify governing body training needs, meet governing body training needs, and comply with state requirements, including any requirements that may change from year to year;
☐Does Not Meet	● Identify any costs required to support the training plan or onboarding process and describe how those costs are supported in the budget; and ● Develop an onboarding process and training that all new board members will be expected to complete including an outline of topics, who will be responsible for onboarding new board members, timeline for onboarding, and procedure for gathering feedback on the effectiveness of the onboarding process. ● Ensure the onboarding process and training plan address training on the open meetings act and responsibilities.

ENTER INDEPENDENT REVIEW TEAM COMMENTS HERE:

B.(2)	Governing Body Self-Evaluation Plan
Rating	**Expectations**
☐Meets	A complete response must ● Identify a plan for annual governing body self-evaluation, include action steps, timelines, responsible parties, timeline on the annual board calendar and identified criteria or standards; and
☐Approaches	
☐Does Not Meet	● Describe how the identified plan will focus on and support continuous improvement.

ENTER INDEPENDENT REVIEW TEAM COMMENTS HERE:

C. Leadership and Management

C.(1)	Governing Body Plan for Monitoring Outcomes
Rating	**Expectations**
☐Meets	A complete response must ● Identify a plan for how the governing body will monitor academic performance on an ongoing basis, include action steps, timelines, responsible parties, and identified criteria or standards;
☐Approaches	● Identify a plan for how the governing body will monitor organizational performance on an ongoing basis, include action steps, timelines, responsible parties, and identified criteria or standards;
☐Does Not Meet	● Identify a plan for how the governing body will monitor financial performance on an ongoing basis, include action steps, timelines, responsible parties, and identified criteria or standards; and

	• Describe how each of the monitoring plans will focus on ensuring the school is meeting its mission, providing a quality education, and acting as a responsible public entity. • Describe how all of the above will be reflected in meeting agendas and the annual board calendar

ENTER INDEPENDENT REVIEW TEAM COMMENTS HERE:

C.(2)	Plan for Hiring Head Administrator
Rating	**Expectations**
☐Meets ☐Approaches ☐Does Not Meet	A complete response must • Identify an ongoing process for hiring a head administrator, both for the initial hiring and for any time the position becomes vacant, include action steps, timelines, responsible parties, and identified criteria or standards; • Identify all leadership characteristics and all qualifications the head administrator must possess; • Explain why and how the identified leadership characteristics; including educational background, experience and qualifications will ensure the head administrator has the required capacity and enable the head administrator to operate the proposed school as a successful, high-quality public charter school ; • Explain how the identified leader, both for the initial hiring and for any time the position becomes vacant, will be on boarded including setting the expectations of how they will be reporting to, and working for and with the board. • Describe how the identified process will ensure the school is able to identify and equitably (openly advertise and interview multiple candidates) hire a highly qualified, licensed administrator ; and • If a potential head administrator has already been identified and/or is a founder, include an assurance that the individual understands they must be selected and hired by an independent governing body and identify the individual's specific leadership skills and qualifications, through verifiable prior experience, that makes them qualified for the position, including holding the required licensure.

ENTER INDEPENDENT REVIEW TEAM COMMENTS HERE:

C.(3)	Distinguished Roles & Responsibilities
Rating	**Expectations**
☐Meets	A complete response must • Identify the process the governing body will use for distinguishing their roles and responsibilities with those of the head administrator; • Include specific actions the governing body will take to ensure the head administrator understands the obligations of the charter contract, the boards'

	role in oversight and chartering, and the requirements of all elements of the plan contained in this application; and
☐Approaches	● Attach a job description in **Appendix B** that includes the following:
	○ Lists all major responsibilities of the head administrator
☐Does Not Meet	○ Includes responsibilities that are unique to charter school leaders
	○ Includes responsibilities that specifically relate to the school's mission, goals, and educational philosophy
	○ Identifies all hiring requirements including all previously identified requirements related to characteristics and qualifications.
ENTER INDEPENDENT REVIEW TEAM COMMENTS HERE:	

C.(4)	**Head Administrator Evaluation Plan**
Rating	**Expectations**
☐Meets	A complete response must
	● Identify the plan for annually evaluating the head administrator, including action steps, timelines, responsible parties, and standards or criteria including how this will be maintained in the boards' annual calendar process;
☐Approaches	● Include action steps to evaluate the effectiveness of the head administrator
	● Describe how the plan specifically takes into account ensuring the equitable implementation of the mission and goals of the proposed school; and
☐Does Not Meet	● Ensure the plan meets the requirements identified in NMAC 6.69.7.8 and 6.69.7.9.
ENTER INDEPENDENT REVIEW TEAM COMMENTS HERE:	

D. Organizational Structure of the Proposed School

D.(1)	**Organizational Chart**
Rating	**Expectations**
☐Meets	A complete response must
	● Include an organizational chart for each year as part of the rollout with grade additions;
☐Approaches	● Show how the Equity Council is incorporated into to organizational chart;
	● Include a narrative that describes the structures and relationships represented in the organizational chart;
☐Does Not Meet	● Include all entities essential to the operation and success of the proposed school; and
	● Describe the relationship among each of the relevant entities.
ENTER INDEPENDENT REVIEW TEAM COMMENTS HERE:	

D.(2)	**Job Descriptions for Certified/Licensed Staff**
Rating	**Expectations**

	A complete response must

☐Meets	● Identify the following:
	    ○ all certified and licensed staff identified in the application
	    ○ all non-certified or unlicensed staff identified in the application who could be considered essential to the operation and success of the proposed school
	    ○ any non-traditional roles or positions;

☐Approaches	● Describe why the identified roles are key to the operation and success of the proposed school; and ● Attach staff job descriptions as **Appendix C** for all of the positions identified in the application response and include the following:

☐Does Not Meet	○ List all major responsibilities of the positions
	    ○ Include responsibilities that specifically relate to the school's mission, goals, and educational philosophy
	    ○ Identify all hiring requirements including qualifications and licensure or certification
	    ○ Identify reporting lines ("reports to") that align to the organizational chart.

ENTER INDEPENDENT REVIEW TEAM COMMENTS HERE:

D.(3)	**Staffing Needs and Plan**
Rating	**Expectations**
☐Meets	A complete response must ● Identify an ongoing staffing plan and process for hiring all necessary staff, both for the initial hiring and for any time a position becomes vacant, include action steps, timelines, responsible parties;
☐Approaches	● Describe how the staffing plan and process will ensure the school is able to hire highly qualified staff, no later than two weeks prior to the start of the proposed school year, on an annual basis, and fill all vacancies within a reasonable time; include how the school will recruit and hire highly-qualified licensed staff; ● Describe how the staffing plan and process is reasonable and adequate to support effective and timely implementation of the academic program/curriculum during the planning year and for all subsequent years;
☐Does Not Meet	● Describe how the staffing plan and process is aligned with the budget and the school's projected enrollment; and ● Describe how the school will make adjustments to the staffing plan in the case that there are differences in projected and actual enrollment.

ENTER INDEPENDENT REVIEW TEAM COMMENTS HERE:

D.(4)	**Professional Development Plan**
Rating	**Expectations**
☐Meets	A complete response must ● Identify an annual professional development plan with action steps, timelines, responsible parties, and associated costs ○ Describe how the plan meets state requirements and rules; and

		o Describe how the school will ensure professional development time is not used for routine staff meetings.
☐Approaches		● Identify a mentorship plan for novice teachers, including action steps, timelines, responsible parties, and associated costs that meets the requirements of PED rules; and

☐Does Not Meet		● Describe how the annual professional development plan and the mentorship plan for novice teachers ensure the following occur:
		    o are supported by the budget
		    o support the implementation of the proposed school's educational plan, mission, and performance goals
		    o not only address required annual training, but are also tailored to address school- and teacher-specific professional development needs.

ENTER INDEPENDENT REVIEW TEAM COMMENTS HERE:

E. Employees

E.	Employer/Employee Terms
Rating	**Expectations**
☐Meets ☐Approaches ☐Does Not Meet	A complete response must ● Identify all primary classes of employees the school will employ (e.g., administrative, professional, term, contract); ● Include an employment policy and handbook ● Provide an explanation for onboarding new staff and re-training returning staff on the terms within the handbook and policy. ● Explain how the school, through the governing body and head administrator, will address employee unions and other school-specific employee representatives.

ENTER INDEPENDENT REVIEW TEAM COMMENTS HERE:

F. Community/Parent/Employee Involvement in Governance

F.(1)	Parental, Professional Educator, and Community Involvement in Governance Plan
Rating	**Expectations**

☐Meets
 	
☐Approaches
	A complete response must
	● Identify school operation and governance structures that will provide the following:
	    o A meaningful opportunity for parental input and participation
	    o A meaningful opportunity for professional educator input and participation
	    o A meaningful opportunity for community input and participation;
	● Describe how the structures will facilitate parental involvement that will help advance the proposed school's mission;
	● Explain the role of the Equity Council in the governance and operation of the proposed school;

	● Include assurances that the school understands it may not require family or parental support or involvement as grounds for accepting, not accepting, enrolling, dis-enrolling, or otherwise differentiating treatment of a student; and
☐Does Not Meet	● If the school plans to offer opportunities for parent support, explain the process of opting out for parents who are unwilling or unable to meet the proposed school's support opportunities.

ENTER INDEPENDENT REVIEW TEAM COMMENTS HERE:

F.(2)	**Plan for Processing Concerns and Complaints**
Rating	**Expectations**
☐Meets	A complete response must
☐Approaches	● Identify a grievance process to receive and process concerns and complaints from the community, parents and families, and students that includes action steps, timelines, and responsible parties; ● Include a final step in the process that provides the grievant a meaningful opportunity to be heard by, and receive a response from, the governing body; if they are unable to obtain resolution from the head administrator; ● Describe how the process is transparent, fair, accessible to the community, and ensure a timely and meaningful response; and
☐Does Not Meet	● describe how the school will provide assurances that the school will additionally meet the specific legal requirements of the McKinney Vento and special education grievance processes.

ENTER INDEPENDENT REVIEW TEAM COMMENTS HERE:

G. Student Recruitment and Enrollment

G.(1)	**Outreach & Recruitment Plan**
Rating	**Expectations**
☐Meets	A complete response must

☐Approaches	● Identify a prospective student outreach and recruitment plan, including action steps, timelines, responsible parties, and associated costs;
	 ● Describe:
	   o how the plan is tailored to ensure equal access to the school
	   o why the plan is likely to attract a student body that is demographically reflective of the local community and school district;
	   o provide a description of how the school will change recruitment plans and outreach if projected student enrollment is not reached

☐Does Not Meet	● Describe how the school will annually evaluate the effectiveness of the outreach and recruitment efforts in ensuring equal access to the school and attracting a student body that is demographically reflective of the local community and school district and how the school will use that information to make adjustments to the outreach and recruitment plan.

ENTER INDEPENDENT REVIEW TEAM COMMENTS HERE:

G.(2)	**Lottery Admission Process**

Rating	Expectations
☐Meets	A complete response must ● Identify a plan to implement a lottery admission process if necessary, include action steps, timelines, and responsible parties;

☐Approaches	● Describe each of the steps of the process to include the following:
	   ○ Pre-lottery entry
	   ○ Lottery
	   ○ Post-lottery registration

☐Does Not Meet	○ Waitlist maintenance and entry; and ● Describe how the lottery process supports equal access to the school.
ENTER INDEPENDENT REVIEW TEAM COMMENTS HERE:	

H. Legal Compliance

H.	Conflict of Interest Policy
Rating	**Expectations**
☐Meets	A complete response must ● Provide a governing body conflict of interest policy that includes action steps, timelines, and responsible parties;
☐Approaches	● Describe how the policy meets the requirements of New Mexico law addressing all areas of potential conflicts of interest; and
☐Does Not Meet	● Include all forms the governing body will or may be required to submit pursuant to the policy.
ENTER INDEPENDENT REVIEW TEAM COMMENTS HERE:	

I. Evidence of Partnership/Contractor relationship (if applicable)

I.(1)	Essential Third Party Relationships
Rating	**Expectations**
☐Meets	A complete response must ● Identify any third party relationships with specific, identified organizations that control or influence essential elements—including the existence, operation, curriculum, or instruction of the proposed charter school—that are required by a partner organization or any part of the application;

☐Approaches	● Describe, in detail, the relationships;
	● Describe why the relationships are essential or required, or how they control essential elements of the proposed charter school;
	● If any such relationships exist identify the following:
	   ○ The specific, identified organizations
	   ○ Contact information for that organization

☐Does Not Meet	○ Specific individuals in the organization that will be associated with the proposed school; ● Describe all legal implications of the essential/required relationships, including the legal benefits and responsibilities of each party.
ENTER INDEPENDENT REVIEW TEAM COMMENTS HERE:	

I.(2)	**Appendix D Attachment Formal Agreement Documentation**
Rating	**Expectations**
☐Meets ☐Approaches ☐Does Not Meet	A response is only required if relationships were identified in questions I.(1) A complete response must ● Identify all MOUs or formal agreements that are attached in **Appendix D**; ● Include proposed formal agreements or MOUs that are signed in **Appendix D**; and ● Identify the responsibilities, activities, and costs of both sides.

ENTER INDEPENDENT REVIEW TEAM COMMENTS HERE:

J. Transportation and Food

J.(1)	**Transportation Plan**
Rating	**Expectations**

☐Meets
 	
☐Approaches
 	
☐Does Not Meet
	A response is only required if the school plans to offer regular transportation either for daily transportation to/from school OR for transportation to/from school specific activities and events that are a necessary part of the mission.
	 All schools must be prepared to meet IEP transportation requirements.
	
	A complete response must
	● Identify a plan for establishing transportation services at the school including specific action steps, timelines responsible parties, and associated costs that address the following:
	   o Identifying equipment purchase or contracting needs
	   o Identifying hiring and or contracting needs
	   o Hiring or contracting
	   o Establishing training needs and inspection process needs
	   o Establishing travel routes and pick up/drop off points
	   o Establishing transportation policies and practices
	   o Identifying student transportation needs; transportation plan costs; and
	● Identify all, but at least one, specific entities or organizations that have been identified as potential partners or vendors for these services

ENTER INDEPENDENT REVIEW TEAM COMMENTS HERE:

J.(2)	**Food Services Plan**
Rating	**Expectations**

	A response is only required if the school plans to offer food services at the school.

☐Meets	A complete response must
	● Identify a plan for establishing food services at the school, including specific action steps, timelines responsible parties, and associated costs that address the following:
	   ○ Identifying equipment purchase or contracting needs
	   ○ Identifying hiring and/or contracting needs
	   ○ Hiring or contracting
	   ○ Establishing training and inspection process needs

☐Approaches	○ Identifying and completing relevant program application and reporting requirements; ● Identify all federal and state food service programs the school plans to participate in;
☐Does Not Meet	● If providing or planning to offer a PreK or Early Childhood program, provide a plan for food service; ● Identify how the school will fund the food service plan costs prior to receiving any applicable reimbursements; and ● Identify all, but at least one, specific entities or organizations that have been identified as potential partners or vendors for these services and describe all steps that have been taken to create a relationship, establish a relationship, or develop a partnership to provide these services.
ENTER INDEPENDENT REVIEW TEAM COMMENTS HERE:	

K. Facilities/School Environment

K.(1)	Appendix E Attachment: Facilities Master Plan Ed/ Spec Checklist
Rating	**Expectations**
☐Meets	A complete response must ● Demonstrate the applicant submitted a Facilities Master Plan to PSFA by the deadline;
☐Approaches	● If offering or planning or offer a PreK or Early Childhood program, provide a description of the facilities and playground in the Facilities Master Plan; and
☐Does Not Meet	● Demonstrate the PSFA has approved the applicant's Facilities Master Plan.
ENTER INDEPENDENT REVIEW TEAM COMMENTS HERE:	

K.(2)	Evidence of Researched Facilities/Properties
Rating	**Expectations**

☐Meets	A complete response must
	● Demonstrate the applicant has done the following:
	   ○ Conducted outreach and researched multiple facilities or properties in the targeted geographic location to understand if there are public facilities 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;

☐Approaches	● Identify at least one potential facility or property that meets requirements.

☐Does Not Meet	● 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.

ENTER INDEPENDENT REVIEW TEAM COMMENTS HERE:

III. Financial Framework

A. School Size

A.	Projected Enrollment	
Rating	**Expectations**	
☐Meets ☐Approaches ☐Does Not Meet	A complete response must ● Identify the anticipated number of students for each of the first five years and "at capacity", based on the long-term strategic plan; ● Identify the grade levels requested to be served in each of the first five years (phase in plan) and "at capacity", based on the long term strategic plan; and ● Identify the student/teacher ratio (not student/staff ratio) that aligns with the number of students served, grade levels, and staffing plan for each of the first five years and "at capacity", based on the long term strategic plan.	

ENTER INDEPENDENT REVIEW TEAM COMMENTS HERE:

B. Budgets

B.(1)	Attached Appendix F, 910B5 State Equalization Guarantee (SEG)
Rating	**Expectations**
☐Meets ☐Approaches ☐Does Not Meet	A complete response must ● Include a complete 910B5 Worksheet in **Appendix F**; ● Use appropriate values and computations in each year; ● Use projected unit value; and ● Budget the correct special education percentage based on the local special education population, unless the school has a sufficient justification for why it will have a larger population (provide justification, if applicable).

ENTER INDEPENDENT REVIEW TEAM COMMENTS HERE:

B.(2)	Attached Appendix G: Proposed five-year Budget Plan
Rating	**Expectations**
☐Meets	A complete response must ● Include a five-year budget plan in **Appendix G** that is based on the 910B5 SEG Revenue Worksheet from Appendix F;

☐Approaches	• Support the proposed school's mission and all elements of the proposed program laid out in the application; and
☐Does Not Meet	• Align with the proposed school's five-year growth plan.

B.(3)	**Budget Narrative**
Rating	**Expectations**
☐Meets ☐Approaches ☐Does Not Meet	A complete response must • Explain basic assumptions; • Identify reliable sources for each assumption; • Include priorities consistent with the proposed school's mission; • Include priorities consistent with the proposed school's educational program; • Include priorities consistent with the proposed school's staffing; and • Include priorities consistent with the proposed school's facility.

B.(4)	Budget Narrative (if replicating a model)
Rating	Expectations
☐Meets ☐Approaches ☐Does Not Meet	A complete response must: • Describe the relationship between the new school and the existing school or network of schools • List the services to be contracted from the existing school or network, • Detail the proposed budget for those services, and • Include a scope of work for a proposed contract or request for proposals.

B. (5)	**Budget Adjustments**
Rating	**Expectations**
☐Meets	A complete response must • Describe budget control strategies **as well as** budget adjustments that will be made to meet financial budget and cash-flow challenges; • Describe budget control strategies **as well as** budget adjustments that will be made to address the failure to receive any anticipated funding sources;

☐Approaches	• Include explanations that are viable and realistic, based on the professional judgment of experienced, licensed, school business officials; • Address how special education students will receive services _**before**_ special education funding is provided, based on accurate 40-day counts; and • Address how gaps between budgeted students and actual enrollment will be addressed.
☐Does Not Meet	• Demonstrate how budget control strategies provide **capacity** to manage the budget successfully. • Address how the school will modify the budget for students with special needs. • describe how the proposed school will address the budget in the event that the proposed school has budgeted for more students, based on early enrollment, than actually enroll in the proposed school at the beginning of the proposed school year.

ENTER INDEPENDENT REVIEW TEAM COMMENTS HERE:

C. Financial Policies, Oversight, Compliance, and Sustainability

C.(1)	Internal Control Procedures
Rating	**Expectations**

☐Meets
 	
☐Approaches
 	
☐Does Not Meet
	A complete response must
	• Identify all the internal control procedures that have been attached in **Appendix H**;
	• Attach in **Appendix H** internal control procedures the proposed school will utilize to assure the following:
	   o safeguard assets
	   o segregate its payroll
	   o segregate cash and check disbursement duties
	   o provide reliable financial information and promote operational efficiency
	   o ensure compliance with all applicable federal and state statues, regulations, and rules;
	• Attach procedures that—based on the professional judgment of experienced, licensed, school business officials—successfully ensure appropriate segregation of duties; and
	• Provide a process the school will use to regularly evaluate compliance with the internal control procedures that have been attached in **Appendix H** and other internal control procedures that will be developed and implemented by the school.

ENTER INDEPENDENT REVIEW TEAM COMMENTS HERE:

C.(2)	Staff for Financial Tasks
Rating	**Expectations**
☐Meets	A complete response must • Identify the appropriate staff to perform each financial task identified in the response to B(1) and all other required financial tasks; • Align completely with the organizational chart from response to D(1) in the Organizational Framework;

☐Approaches	● Align completely with the budget in A(1) and A(2) responses in Financial Framework;
	● Describe appropriate qualifications and responsibilities for each of the identified positions; and
☐Does Not Meet	● Include a plan that will result in the recruitment, identification, the evaluation of candidates, and the hiring of highly qualified staff for each of the identified positions, no later than two weeks prior to the start of the proposed school year.
ENTER INDEPENDENT REVIEW TEAM COMMENTS HERE:	

C.(3)	**Governing Body Legal & Fiscal Oversight**
Rating	**Expectations**
☐Meets	A complete response must
	● Describe how the Governing Body audit and finance committees will be formed and how they will:
☐Approaches	o Function generally
	o Ensure proper legal oversight
	o Ensure proper financial oversight;
☐Does Not Meet	● Describe how the proposed school's audit and finance committees will interact with the school's management; and
	● Describe how the audit and finance committees will interact with the full Governing Body.
ENTER INDEPENDENT REVIEW TEAM COMMENTS HERE:	

IV. Evidence of Support

A. Outreach Activities

A.	**Outreach Program**
Rating	**Expectations**
☐Meets	A complete response must
	● Describe an outreach program to develop community support for the proposed school that has been implemented during the application process;
	● Describe specific activities that have been implemented, include evidence of implementation;
☐Approaches	● Include evidence that demonstrates the activities reached a broad audience that is representative of the community in which the proposed school will be located; and
☐Does Not Meet	● Describe how this outreach has enabled the applicant team to understand the needs of the community in which the proposed school intends to locate.
ENTER INDEPENDENT REVIEW TEAM COMMENTS HERE:	

B. Community Support

B.	Evidence of Community Support
Rating	Expectations
☐Meets	A complete response must ● Include quantitative data that demonstrates community support from a broad audience for this proposed school; ● Include qualitative data that demonstrates community support from a broad audience for this proposed school;
☐Approaches	● Include descriptions of the anticipated demographics of the students who will be served by the proposed school, disaggregate the number of prospective students by zip code, school of attendance (current), gender, type of current school (home, private, public), or other pertinent data.
☐Does Not Meet	● Ensure the demonstrated support includes support within the community of the specific targeted geographic location; and ● Describe why the applicant team believes the evidence demonstrates the school will be embraced and supported as the community's school and that there is abundant support for this school as a part of the community.
ENTER INDEPENDENT REVIEW TEAM COMMENTS HERE:	

C. Community Relationships

C.	Networking with Community
Rating	Expectations
☐Meets	A complete response must ● Identify and describe specific meaningful and strategic networking relationships with local community agencies, groups, or individuals that will support the school. Include evidence of these relationships;
☐Approaches	● Identify and describe specific meaningful and strategic resource agreements with local community agencies, groups, or individuals that will support the school. Include evidence of these relationships; and
☐Does Not Meet	● Describe why the applicant team believes the identified relationships demonstrate the school will be embraced and supported as the community's school and that there is abundant support for this school as a part of the community.
ENTER INDEPENDENT REVIEW TEAM COMMENTS HERE:	