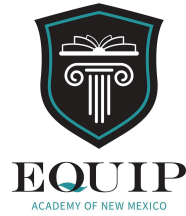


GOVERNING BODY BYLAWS



Governing Body Bylaws **Equip Academy of New Mexico Governing Board**

I. Governing Board and Member Structure

Section 1: The governance of Equip Academy of New Mexico is entrusted to the Governing Board.

Section 2: In addition to all powers conferred upon the Governing Board by New Mexico law and Articles of Incorporation, the Governing Board shall have the power to:

1. review and adopt the school's mission statement
2. review and adopt bylaws and establish policies consistent with the school's mission
3. hire, evaluate, set compensation and employment terms for, and terminate the Head of School; this is the only school position that the Governing Board oversees
4. oversee financial matters for the school, including approving the annual school budget and authorizing designees to sign checks and legal documents on behalf of the school.

Section 3: The Governing Board shall establish the number of Members, which shall consist of at least five (5) Members and no more than eleven (11) Members. All Members shall have identical rights and responsibilities.

Section 4: For the purpose of establishing continuity and stability within the Board, the members of the inaugural Governing Board will serve staggered terms of office. The staggered terms will be as follows: At least three (3) initial Members will serve a term of three (3) years from the date of their appointments, or until their successors are seated. At least two (2) members will serve a two (2) year term. At least one (1) member will serve a one (1) year term. Following the inaugural staggered terms, all subsequent terms of office for Board members will be three (3) years in duration.

Section 5: Recruitment and selection of Governing Board members will reflect qualities, qualifications and diversity determined by the Board, delineated in the Job Description of the Governing Board.

Section 6: A Member may resign at any time by sending a written resignation to the Chair of the Governing Board. This may take the form of an email.

Section 7: The Governance Committee shall be charged with recruiting and recommending potential Board candidates to the full Board.

Section 8: The Governing Board may remove any Officer or Member with a simple majority vote of a quorum of the Governing Board at any regular or special meeting of the Board, provided that a statement of the reason or reasons shall have been mailed by Registered Mail to the Officer or Member proposed for removal at least thirty (30) days before any final action is taken by the Governing Board. This statement shall be accompanied by a notice of the time when, and the place where, the Governing Board is to take action on the removal. The Officer or Member shall be given an opportunity to be heard and the matter considered by the Governing Board at the time and place mentioned in the notice.

Section 9: Members of the Governing Board:

1. Shall receive no payment apart from reimbursement for per diem according to the New Mexico Per Diem and Mileage Act.
2. Shall provide Equip Academy of New Mexico with the highest degree of undivided duty, professionalism, and care, and shall undertake no enterprise to profit personally from their position with Equip Academy of New Mexico.
3. Are bound by the Code of Conduct and Conflict of Interest laws and policies.
4. Any Board Member who individually or as part of a business or professional firm is involved in the business transactions or current professional, shall have no direct or indirect financial interest in the assets or leases of the Equip Academy of New Mexico.
5. Shall uphold and comply with all application conflicts of interest laws.

II. Selecting New Governing Members

1. The Governance Committee leads Board member recruitment and solicits candidate recommendations from the full Board.
2. The Governance Committee evaluates qualifications of Board candidates and presents final nominees to the full Board for consideration.
3. A vote for membership must be taken at a public Board meeting.
4. Approval of 2/3 of sitting Board members is needed to seat the new Member.

5. Upon approval, the new Board Member completes, signs, and submits to the Board the Conflict of Interest Policy and Code of Conduct.

III. Meetings

Section 1: Regular meetings of the Board shall be as prescribed by the Board's Annual Open Meetings Act Resolution.

Section 2: Special meetings of the Governing Board may be called by the Board Chair or by a majority of the Governing Board, due notice having been given to each Member five (5) calendar days prior to the meeting.

Section 3: A simple majority of the Members then in office shall constitute a quorum for the transaction of business at any regular or special meeting of the Governing Board.

Section 4: As appropriate and necessary, the Governing Board shall follow Robert's Rules of Order for all meetings.

Section 5: Notice of all regular and special meetings of the Governing Board, an agenda of all items to be discussed at such meetings, and agenda support materials shall be circulated to all members prior to the meeting and shall be made in compliance with the Open Meetings Act and the School's Open Meetings Act Resolution. Meeting notices and agendas must be posted publicly at least seven (7) calendar days prior to the meeting.

Section 6: An absentee Governing Board Member may not designate an alternate to represent them at a Governing Board meeting.

IV. Officer Structure

Section 1: There shall be four (4) elective Officers of the Governing Board: a Board Chair, a Vice Chair, a Secretary, and a Treasurer.

Section 2: The election of Officers shall be held annually and as needed, specifically as positions come to term or Members resign their positions or are removed. As this circumstance arises, the Governance Committee shall present selected Board Member nominees to the Governing Board for consideration and vote.

Section 3: In the event that the office of the Board Chair becomes vacant, the Vice Chair shall become Chair for the unexpired portion of the term unless an election for a new Chair is desired by a simple majority of a quorum of the Board present at any regular or special meeting. In the event that the office of Vice Chair, Secretary, or Treasurer becomes vacant, the Chair shall appoint Interim Officers to fill such vacant offices until a scheduled meeting of the Board can be held at which time an election for the vacant office shall be held.

Section 4: The Board Chair shall preside over all meetings of the Governing Board. In the Chair's absence, the Vice Chair shall preside. The Chair is responsible for setting the agenda for all meetings, calling any special meetings, and appointing Members to chair all committees. Any Member may request of the Chair or the Head of School that an item be added to the agenda.

Section 5: The Treasurer shall have general supervision of the Board's financial securities. The Treasurer shall also supervise the maintenance of the Board's financial records and books, and sign such instruments as required by the office.

Section 6: The Secretary shall issue Governing Board meeting notices, and shall keep minutes, manage meeting documents, and perform any additional duties required by this position.

V. Committee Structure

Section 1: The Governing Board may appoint committees of the Governing Board. The Governance Committee must consist only of active Equip Academy of New Mexico Governing Body Members. All other Standing Committees may be composed of seated Governing Board Members, community members, or both. The Governing Board will determine the need for additional committees and also the membership of that committee.

Section 2: Each standing committee will consist of at least three people. The Chair of each standing committee must be a Governing Board Member.

Section 3: Standing Committees shall include the following;

1. Governance Committee
2. Academic Committee
3. Finance Committee
4. Audit Committee
5. Culture and Equity Council

Membership of the Audit and Finance Committees shall comply with NMSA Section 22-8-12.3(B).

Section 4: The Chair of the Governance Committee shall be elected by a simple majority vote of a quorum of the members of the Governing Board. The Chair of the Committee may then select at least two (2) persons for the Committee. Each committee member shall serve a term of two (2) years, with staggered terms to maintain committee continuity.

Section 5: Governance Committee duties:

1. Maintain oversight and evaluation of the Governing Board and its effectiveness in meeting charter mission and goals
2. Maintain ongoing Board member recruitment and candidate recommendation responsibilities
3. Evaluate the qualifications of incoming Governing Board candidates and present final nominees for the vacant member positions on the Governing Board
4. Ensure the vote for new member(s) is taken by the Governing Board at a public Board meeting
5. Ensure the approval of 2/3 of sitting Board members is needed to seat new Member(s)
6. Upon approval, new Board Member completes, signs, and submits to the Board the Conflict of Interest Policy and Code of Conduct
7. Provide Board orientation to new members

V. Fiscal Year

The Equip Academy of New Mexico fiscal year will begin July 1 and end on June 30 of each calendar year. All school finances will be audited annually.

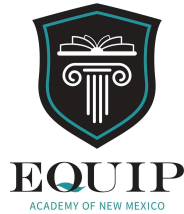
VI. Rules of Order

Equip Academy of New Mexico will adhere to rules of order outlined in the current edition of Robert's Rules of Order for all Governing Board regular and special meetings.

VII. Amendments

The Bylaws presented here may be amended at any regular meeting through a simple majority vote of all Members in office at the time of amendment.

CONFLICT OF INTEREST AND NEPOTISM POLICIES



Conflict of Interest and Nepotism Policies Equip Academy of New Mexico Governing Board

Purpose

The intent of this Conflict of Interest and Nepotism policy is to ensure clarity in what constitutes a conflict of interest or nepotism for employees or governing board members. Equip Academy of New Mexico will maintain strict compliance with Charter Schools Act (NMSA § 22-8B-5.2) and Public School Code (NMSA § 22-1-1 et. seq.), and maintain functional and transparent organizational practice free of conflict of interest and nepotism.

Terms

Immediate Family Member. A spouse, son, daughter, father, mother, in-law relation, step children or step parent, or other relative who is financially supported by a member of the Equip Academy of New Mexico team.

Independent Board Member. A board member who does not have a substantial Financial Interest in and is not an employee of, and does not have a Relative who has a substantial Financial Interest in or is an Officer (as defined below) of, any entity that has provided payments, property or services to, or received payments, property or services from, the School District.

Related Party. Persons who may be considered a Related Party of the School District or an Affiliate of the School District

Financial Interest. A person has a Financial Interest if such person would receive an economic benefit, directly or indirectly, from any transaction, agreement, compensation agreement (including direct or indirect remuneration as well as gifts or favors that are not insubstantial), or other arrangement involving the School District (Charter School).

Conflict of Interest. Occurs when an Equip Academy of New Mexico employee or Governing Board member is an owner or agent of, contractor with or otherwise has a financial interest in a for-profit or nonprofit entity with which Equip Academy of New Mexico contracts directly, for professional services, goods or facilities. A conflict of interest exists when the Governing Board member or employee, or an immediate family member of the member, or

employee, has a financial interest in the entity with which the charter school is contracting and will gain compensation. Compensation includes direct and indirect remuneration, as well as gifts or favors.

Nepotism. The approval of employment or governing board membership of an immediate family member of the Head of School or a member of the Governing Body of Equip Academy of New Mexico, specifically when selection and supervisory powers are between relatives.

Expectations and Procedure

Determination of Conflict of Interest

In maintaining compliance with Charter Schools Act (NMSA § 22-8B-5.2) and Public School Code (NMSA § 22-1-1 et. seq.), Equip Academy of New Mexico will require each employee and proposed Governing Board member to review their own personal and professional relations to consider potential conflict of interest or nepotism conditions.

- Does the individual have any financial interest in for-profit or nonprofit entities with which the School contracts directly, for professional services, goods or facilities?
- Is the individual an employee, agent or board member of the chartering authority who would conduct the initial review, approval, ongoing oversight, evaluation or charter renewal process of Equip Academy of New Mexico?
- Does the individual or their immediate family member have any financial interest in the entity with which the School is contracting?
- Is the selection or approval of the individuals' candidacy influenced by immediate family relationships or connections?

Duty to Disclose

Upon being offered employment or a position with the Equip Academy of New Mexico Governing Board, the individual will be required to disclose material facts to the Governing Board and Head of School. Conflicts may be made known by either the conflicted member, employee, officer, or agent, or by anyone aware of the conflict.

All transactions, agreements, or any other arrangements between the School District and a Related Party, and any other transactions which may involve a potential conflict of interest, shall be reviewed by the Board. No Related Party shall vote, act, or attempt to influence improperly the deliberations or voting on any matter in which he or she has been determined by the Board to have a Financial Interest.

A voting member of the Board or an Officer who receives compensation directly or indirectly from the School District (Charter School) for services or a Board Member serving as a voting member of any Committee whose jurisdiction includes compensation matters is precluded from voting or acting on matters pertaining to that Board Member's or Officer's compensation. However, a voting member of the Board or any Committee whose jurisdiction includes compensation matters and who receives compensation, directly or indirectly, from the School District, either individually or collectively, may upon request of the Board or Committee, provide information regarding compensation.

Audit Committee Review

The Board may delegate to the Audit Committee a review and approval of any Related Party Transaction involving a Related Party and the School District, as contained in this Policy; provided that if the Related Party Transaction would otherwise require full Board approval, the Committee shall submit the Related Party Transaction to the Board for consideration, providing its recommendation as to whether or not to approve it.

Recording of Proceeding

All meeting minutes of the Board and all Committee meetings at which a Related Party Transaction is considered shall contain:

- Names of the persons who disclosed or otherwise were determined to have a potential or actual Financial Interest and/or conflict of interest, the nature of the potential or actual Financial Interest and/or conflict of interest, any action taken to determine whether a Financial Interest or conflict of interest exists, and the Board's determination as to whether a Financial Interest and/or conflict of interest exists.
- Names of the persons who were present for deliberations and votes relating to any determinations under this Article, including whether the Related Party and any Board Members who are not Independent Board Members left the room during any such deliberations, the content of such deliberations, including consideration of alternative transactions, and whether or not the transaction with the Related Party was approved by the Board.
- Minutes that document contemporaneously the deliberations and determination regarding any Financial Interest or conflict of interest.

Governing Board Annual Statements

Membership to the Governing Board shall be contingent upon an annual statement which affirms such person has:

1. Received a copy of the Conflict of Interest Policy;

2. Read and understood the Policy; and
3. Agreed to comply with the Policy

Employment and Membership

Equip Academy of New Mexico will adhere to the Nepotism section of the Conflict of Interest Policy which adheres to NMSA 22-8B-10 and all statutory requirements. The Head of School will refrain from hiring immediate family members and Governing Board members will refrain from voting in members or employees who are immediate family members. Should an occasion arise where the best qualified person for a position is an immediate family member, the matter should be immediately referred to the PEC for consideration and guidance. As stated above, this person must be uniquely qualified for the position and the decision to hire or include in membership will not be finalized by the immediate family member who is a current Equip Academy of New Mexico employee or board member.

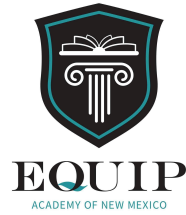
Where Conflict Exists

Upon notice of conflict of interest, the individual will be prohibited from participating in selecting, awarding, or administering the transaction, arrangement, or contract with the school and from having or acquiring any financial interest in the transaction, arrangement, or contract.

The conflict shall be disclosed to the Chair of the Governing Board or, in the event the conflicted member is the Chair, to the Head of School, or any other member of the Governing Board. If Equip Academy of New Mexico should seek to hire an employee who is an immediate family member of the Head of School, or a Governing Board member, the PEC must be notified and informed of the relationship and qualifications of the individual for the position against others in the applicant pool. The PEC will work to evaluate the case and mitigate the potential nepotism concern.

Consequences of Conflict of Interest Violations

A violation of this policy and therefore NMSA § 22-8b-5.2, will render the contract between the person or the person's immediate family member and the charter school voidable at the option of the Public Education Commission, the Public Education Department, the Equip Academy of New Mexico School Leadership or the Equip Academy of New Mexico Governing Body. A person who knowingly violates this subsection may be individually liable to the charter school for any financial damage caused by the violation.



Governing Body Conflict of Interest Agreement
Conflict of Interest Statement

Please initial at the end of Item A or complete Item B, whichever is appropriate; complete the balance of the form; sign and date the statement; and return it to the Board Treasurer.

A. I am not aware of any relationship or interest or situation involving my family or myself that might result in, or give the appearance of being, a conflict of interest between such family member or me on one hand and Equip Academy of New Mexico on the other.

Initials: _____

B. The following are relationships, interests, or situations involving me or a member of my family that I consider might result in or appear to be an actual, apparent, or potential conflict of interest between such family members or myself on one hand and Equip Academy of New Mexico on the other.

Initials: _____

Please note any relationships, circumstances, or positions in which you or any immediate family members may be in conflict with this Conflict of Interest Policy or consider there could be a future conflict of interest, as defined by the schools Conflict of Interest Policy.

Individual of Concern for Conflict of Interest	Reason

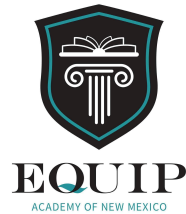
I, _____ acknowledge the information stated above is true, to the best of my knowledge. I have carefully read and reviewed the Equip Academy of New Mexico Conflict of Interest Policy and will adhere to the policy for the duration of my employment or membership with the school.

Print Name: _____

Signature: _____

Date: _____

GOVERNING BOARD JOB DESCRIPTION



Governing Board Job Description **Equip Academy of New Mexico Governing Board**

Overview

The Equip Academy of New Mexico Governing Board is managed by the Board Chair. This position is one of the key required positions of the Board, and requires a number of skills and abilities to execute state board requirements and uphold the approved charter. These skills are outlined below. This is an exciting role that allows an individual to facilitate collective impact on the educational success of students and connect family and community members through our mission.

Key Responsibilities

- Coordinate/oversee Board activities, ensuring actions are ethical, appropriate, legal, relevant
- Ensure full Board accountability for executing Board functions and responsibilities
- Guide the Board in the recruitment and selection of the Head of School as well as conduct an annual evaluation to determine contract continuity
- Serve as a lead Governing Body contact with the authorizer, sharing all relevant information between the authorizer and the entire board
- Facilitate/encourage a culture of inclusions, rigor, accountability, and strategic decision making in regular and special board meetings
- Ensure an annual Governing Body evaluation is conducted annually and feedback is carefully considered, and changes made where necessary or appropriate
- Collaborate in the planning and facilitation of the annual Board retreat and training
- Receive, review, and carefully consider the financial, academic, and organizational monthly, quarterly, and annual reports for future planning and action
- Maintain ongoing awareness of the approved charter and mission-aligned goals, as well as all responsibilities to the authorizer

Leadership Functions

- Maintain healthy Board through recruitment and retention of effective, responsive members

- Maintain community relationships and champion diversity, equity, and inclusion

Standing Committee Work

- Establish and maintain committee operation and reporting expectations
- Support committee in achieving annual goals
- Appoint committee members to standing committees

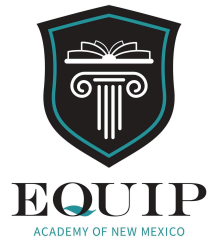
School Collaboration

- Develop strong working relationship with school leadership
- Maintain knowledge of community partners
- Monitor school leadership goals and professional accomplishments
- Collaborate with school leadership to understand and elevate school priorities and concerns

Important Skills

- Careful and considerate communication
- Community building ability
- Knowledge of compliance requirements and familiarity with charter school financial, organizational, and academic functioning
- Approachable and responsive

GRADE TEAM LEAD APPLICATION AND MANAGEMENT PLAN



Grade Team Lead Management Plan Weekly Meetings: (Date and Time)

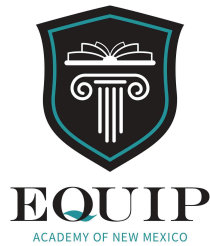
Position Leadership Roles and Responsibilities:

- Plan and facilitate grade team meetings weekly
 - Ensuring quality and timeliness of lesson plans and materials
 - Communicate what data needs to be entered and by when
 - Know when assessments are happening and ensuring all team members have what they need
- Coordinate morning meeting or advisory planning and community meeting planning across the grade
- Plan, lead, and organize field studies; grade-level academic, attendance, and core values celebrations
- With the support of the Head of School (HOS), propose and plan celebratory and school-wide events that create community
- Ensure teachers follow the referral process for all students
- GTLs will create or review homework packets with weekly letters home to families detailing the week's events and manage homework distribution
- GTLs create and maintain grade-level bulletin board(s) and create and execute family communication plans—ensuring all teachers on the grade team communicate with families regularly for important grade-wide events/assessments
- Grade team leaders will participate in leadership professional development sessions meetings led by leadership such as the HOS and take on additional leadership responsibilities that drive targeted academic and cultural results.
- Plan and facilitate activities across the grade team

Goals	Support needed

Grade Team Lead: _____ Date: _____

Supervisor: _____ Date: _____



Grade Team Lead Description

Responsibilities of the Role Descriptions:

1. School and Classroom Environment

- Partners in leading a culture that results in a love of learning, student agency, and the full range of student learning and growth
- Plans, leads, and organizes grade-level events such as, field studies, Community Circles and grade-level events etc.

2. Teaching and Learning

- Supports the team's ability to foster a culturally responsive classroom
- Supports the team to prepare and execute lessons that are culturally relevant and fosters student growth, engagement, creativity, and agency through aligned, culturally relevant materials and pedagogical practices

3. Racial Equity Mindset

- Plans and executes team activities that build a culture that values and respect diversity and is inclusive, equitable, and anti-racist

4. Effective Teaming

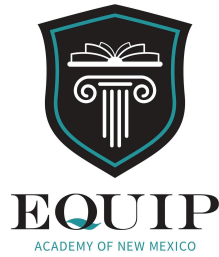
- Promotes and develops a strong team that collaborates, communicates, and works together to achieve strong student outcomes

5. Whole Student Focus

- Fosters a culture of academic success and social-emotional development through partnerships with students, families, and the greater community
- Fosters and sustains a warm, welcoming, and inclusive environment for students, families, and staff
- Engages families and communities in support of child's learning and school learning goals and supports others in building family partnerships

6. Strategic Leadership

- Supports the school's vision for achieving goals and positive student outcomes
- Supports and strengthens a data-driven and data-hungry culture that relentlessly seeks continuous improvement
- Strengthens and maintains academic/student culture systems and procedures



Grade Team Lead Application

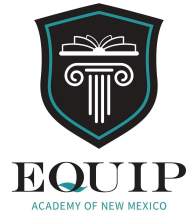
Applicant Name: _____ Grade Level: _____ Date: _____

1. What about the GTL position inspired you to apply?

2. Why do you think you're a good fit for the GTL position?

3. What does building community, centering belonging and maintaining positive relationships look like to you?

INTERNAL CONTROL PROCEDURES



Internal Control Procedures

Introduction

Equip Academy of New Mexico will adopt the following financial policies and procedures to ensure the most effective use of the public and private funds to support its mission and to ensure that the funds are budgeted, accounted for, expended, and maintained appropriately.

Equip Academy of New Mexico is committed to developing and maintaining financial policies and procedures that ensure sound internal controls, fiscal responsibility, and accountability in accordance with Generally Accepted Accounting Principles (GAAP). Equip Academy of New Mexico will follow all the applicable laws and regulations that govern Charter Schools within the State of New Mexico.

Equip Academy of New Mexico'S Governing Board (Board) is entrusted with funds granted by government agencies, private foundations, and individual contributors, and it will adhere to the highest of standards of accounting. Clear financial policies and procedures will enable the school to meet its financial needs and obligations, ensure long-term financial stability and viability, and protect its tangible assets and reputation.

Financial Policies

1. Equip Academy of New Mexico shall comply with the laws, rules, and regulations applicable to it in regard to financial matters and with the terms of the charter contract by which it is bound.
2. Control procedures shall be in place to ensure the security of the school's assets.
3. Timely and accurate financial information shall be produced to fulfill all reporting requirements and management needs.

Financial Leadership and Management

The financial leadership and management team of Equip Academy of New Mexico consists of:

- Equip Academy of New Mexico Governing Board
- Finance Committee
- Audit Committee
- Treasurer of the Governing Board (also Chairperson of Finance Committee)
- Head of School
- School Business Official (Business Manager)
- Office Manager

The day-to-day fiscal responsibilities of Equip Academy of New Mexico are assigned to its financial staff. Ultimate fiduciary responsibility for the overall management of the organization lies with the Governing Board.

The Governing Board will meet, at a minimum, twelve (12) times during the course of each fiscal year to ensure that its fiduciary duties are met and will meet as needed during breaks. Equip Academy of New Mexico will have an established Finance Committee. The Finance Committee will be commissioned by and responsible to the Governing Board. It will have the responsibility for working with Head of School to make recommendations to the Board in the following areas:

- a. financial planning, including reviews of the school's revenue and expenditure projections
- b. review of financial statements and periodic monitoring of revenues and expenses
- c. review and approval of disbursements
- d. review and approval of Budget Adjustment Requests
- e. annual budget preparation and oversight
- f. procurement.

The Finance Committee shall also serve as an external monitoring committee on budget and other financial matters. The Finance Committee shall be assisted by the Head of School. Members of the Finance Committee shall be the Treasurer of the Board, who shall serve as chair of this committee, and at least one other member of the Board, as appointed by the Chair of the Board, with the advice and consent of the Board in accordance with the Board's bylaws and NMSA 1978 §22-8-12.3 (2010).

The Finance Committee of the Governing Board shall be responsible for the primary Board-level oversight of the school's financial matters, as defined by the Board and New Mexico law. The Head of School of Equip Academy of New Mexico will have primary responsibility for executing all financial matters and financial decisions of the Board. All members of the fiscal management team will work together to make certain that all financial matters of the organization are addressed with care, integrity, and in the best interest of Equip Academy of New Mexico.

The Head of School is responsible for administering the school's adopted policies and ensuring compliance with procedures that have been approved by the Governing Board. Recommendations for changes or amendments to policies relating to school finances shall be conducted by the Finance Committee and considered by the Governing Board every year.

Any violation of Equip Academy of New Mexico's financial policies and procedures may be considered to be cause for termination or removal and, depending upon the nature of the infraction, civil and/or criminal prosecution.

PROCEDURAL REQUIREMENTS

Pursuant to 6.20.2.8 NMAC, Equip Academy of New Mexico will account for every financial transaction. Equip Academy of New Mexico will build and sustain a budget that aligns to and conforms with the Public School Code and New Mexico Public Education Department (NMPED) procedures for public school accounting and budgeting. Under the supervision of the Board, Equip Academy of New Mexico's Head of School will be responsible for maintaining the school's budget as well as preparing and presenting all financial documentation. Equip Academy of New Mexico's Head of School will meet the competency requirements in 6.63.12.9 NMAC.

Budget Preparation

Pursuant to 6.20.2.9 NMAC, Equip Academy of New Mexico will follow budget requirements stated in all sections of NMSA 1978, as well as meet all NMPED requirements and procedures when preparing, submitting, maintaining, and reporting budgetary information.

Projecting Revenue

Equip Academy of New Mexico's Head of School and its Governing Board will work collaboratively with the NMPED to project an accurate annual budget that will sustain the school and its mission. The following points will hold constant:

1. The State Equalization Guarantee (SEG) will be Equip Academy of New Mexico's primary source of revenue. The school will use historical data to project an average number of students in each category outlined in the 910B5 (SEG) budget preparation spreadsheet provided by the NMPED. Equip Academy of New Mexico will use both historical data and estimated student enrollment to project the number and type of certified and non-certified FTEs. Location and historical data allow Equip Academy of New Mexico to include the At-Risk Unit in the 910B5. The State Equalization Guarantee will be computed using all current data and formulas provided by the NMPED.
2. Any non-categorical revenue that is generated, such as donations, will be projected based upon legitimate and authenticated funding sources. A collaborative effort between the Donor, the Governing Board and Head of School will provide protection to ensure that an accurate projection of this revenue is made, recorded, and reported to all parties.
3. If Equip Academy of New Mexico maintains any cash balance from the prior fiscal year in its Operational Fund, the balance may be budgeted for operational expenditures, with the exception of payroll, with the proper approval from the NMPED and the Office Manager of Education.

Projecting Expenditures

Equip Academy of New Mexico will use prior year statistical data as well as projections of future enrollment to estimate membership. Projections of future enrollment based on the school's growth and phase-in plan will be used to identify Equip Academy of New Mexico's certified and non-certified staffing needs as well as the associated costs, that may include, but may not be limited to, instructional supplies, equipment, and facility. To understand and better anticipate the impact on students due to budgetary changes, projections of new personnel needed and their associated costs will be made with ample time to address any impacts.

Equip Academy of New Mexico will use historical costs to project the school's contributions to the New Mexico Educational Retirement and ERA Retiree Plans. In addition, the school's contributions to the New Mexico Public Schools Insurance Authority (NMPSIA) for health insurance premium estimates will be gauged using historical data and our growth and phase-in plan, so that future staffing may be projected.

Equip Academy of New Mexico will maintain an emergency account that may range from one (1) percent to five (5) percent, not to exceed five (5) percent, of its operational expenditures using operational cash balances carried forward from the previous fiscal year. Equip Academy of New Mexico will use the account to pay for any unforeseen expenditures that may arise after the initial budget has been approved. Money in the emergency account shall not be expended on salaries or benefits without prior written approval from the Head of School.

Budget Approval

Pursuant to 6.20.2.9 NMAC, Equip Academy of New Mexico will follow all budget requirements stated in Sections 22-8-5 through 22-8-12.3, NMSA 1978, and procedures of the department in preparing, submitting, maintaining, and reporting budgetary information. Budgetary control shall be at the function level. Over-expenditure of a function shall not be allowed. Equip Academy of New Mexico will follow the following procedures to ensure that the school's budget is approved by the NMPED:

1. Equip Academy of New Mexico will use the State Equalization Guarantee (SEG) to calculate the operational revenue by means of the 910B5 provided by the NMPED. The school will rely upon historical data, prior year enrollment, and projected membership, as well as the prior year T & E index and At-Risk index.
2. Equip Academy of New Mexico will submit its budget as scheduled each year by the NMPED and the budget will be reviewed by the NMPED. Prior to submission of the budget to the NMPED, the Governing Board must review and approve the budget as presented. Equip Academy of New Mexico and the NMPED shall review the school's projected revenues and confer before determining where additions or reductions to the budget will be incorporated.
3. Prior to June 20th and in compliance with the Open Meetings Act, Section 10-15-1 et seq. 1978 Public School Code and local Board policy, Equip Academy of New Mexico will hold a public hearing on the proposed budget and shall give notice of the public hearing. Certification of the proposed budget by the NMPED shall be on or before July 1st. The approved and certified budget will then constitute the operating budget of Equip Academy of New Mexico and will be integrated into the school's accounting system. Encumbrances will be used as an element of control and integrated into the budget system.

Budget Maintenance Standards

Pursuant to 6.20.2.10 NMAC, budget adjustment requests shall be submitted on the most current form prescribed by the NMPED. Equip Academy of New Mexico will submit budget adjustment requests for the operating budget to the NMPED for budget increases, budget decreases, transfers between functional categories, and transfers from the emergency reserve account. If the NMPED does not take action on a budget adjustment request within thirty (30) calendar days from the date of receipt by the NMPED, the request will be considered approved. Periodic financial reports will be submitted by Equip Academy of New Mexico to the NMPED using the NMPED-approved format; reporting will be done on a monthly or quarterly basis based on NMPED discretion. Reports will be submitted to the NMPED by the last working day of the end of the month following the end of the required reporting period, unless extended to a later date by the NMPED Office Manager of Education as per the requirements of the NMPED.

Budget Adjustments

Equip Academy of New Mexico acknowledges its responsibility to develop and maintain policies and procedures that ensure the financial stability of the school and create oversight within the school. Equip Academy of New Mexico intends to ensure that its budget and financial accounting are maintained in accordance with the Public School Code, Chapter 22, NMSA, 1978 Compilation, with Generally Accepted Accounting Principles (GAAP), with federal and state laws and regulations, and that are in accordance with all rules and regulations of the NMAC and the NMSA 1978.

Pursuant to Section 22-8-41(C) NMSA 1978, operational cash balance carried forward from the previous fiscal year will not be used for salaries and payroll benefits. If there is a need to adjust the approved budget due to an increase in revenue, decrease in revenue, or budget transfers, Equip Academy of New Mexico will perform a Budget Adjustment Request (BAR).

If Equip Academy of New Mexico experiences a budget increase or decrease, the school will ensure that the request for approval of the budget adjustment be done at a public meeting in compliance with the Open Meetings Act, NMSA 1978 Section 10-15-1 et seq., the New Mexico Public School Code, and local Board policy. If the Governing Board approves the adjustment, it will be entered into the state's Operating Budget Management System (OBMS) and approved electronically by the Head of School. Once approved by the NMPED, it will be entered into the school's accounting system. Budget adjustments will not be incorporated into the school's accounting system until NMPED approval is received.

Any budget transfers that involve a transfer of funds between expenditure codes within the same function (intra-budget transfers) will only require Equip Academy of New Mexico's Governing Board approval. Budget transfers between functions (inter-budget transfers) will need the approval of the Governing Board and the NMPED prior to expenditure of those funds. Equip Academy of New Mexico will maintain a log of all budget adjustment requests to account for status, numerical sequence, and timely approval at each level. The log will be retained for audit purposes.

Financial Reporting

Equip Academy of New Mexico will prepare monthly financial reports comparing actual revenue and expenditures to budgeted amounts. Monthly financial reports reflecting the financial and budget position of Equip Academy of New Mexico shall be provided to the Finance Committee. The Finance Committee is responsible for reviewing and reporting to the Governing Board during their monthly meeting. The Finance Committee will review the following each month:

- journal entry reports
- financial statement review
- bank reconciliations
- outstanding purchase orders
- budget adjustment requests
- other financial matters directed to the Finance Committee
- Audit Committee reports if applicable

NMPED-required Financial reports shall be submitted no later than the last day of the month following the end of the reporting period, unless extended to a later date by the Office Manager of Education. The Governing Board shall be notified of any report which has not been submitted on a timely basis and the reason(s) for the late filing. If any financial reports required by the NMPED have not been submitted on a timely basis, the Governing Board will be notified and provided with the reason(s) for the late filing. Reports will be generated by the school's accounting system in the most current required NMPED format. Data reported on state reports will tie to revenue/expenditure and cash ledgers.

Audit Committee

NMSA 1978 Section 22-8-12.3 requires each governing authority of the charter school to establish committees, including an Audit Committee. The Audit Committee is commissioned by and responsible to the Governing Board. The Audit Committee shall:

- review the annual request for proposal for financial audit services
- make recommendations regarding selection of the external auditor
- attend the entrance and exit conferences for annual and special audits
- be accessible to the external financial auditors as requested to facilitate communication with the Board and Head of School
- track and report progress on the status of the most recent audit findings and advise the Governing Board on policy changes needed to address audit findings
- provide other advice and assistance as requested by the Governing Board
- be subject to same requirements regarding confidentiality of audit information as those imposed upon the local school board by Audit Act [12-6-1 NMSA 1978] and rules of the state auditor

The Audit Committee shall be assisted by the Head of School. Members of the Audit Committee shall be two members of the Board and two volunteers, one who has experience in accounting or financial matters and a parent. The Head of School and Business Manager shall serve as an ex-officio member of the committee.

INTERNAL CONTROLS

Pursuant to 6.20.2.11 NMAC, Equip Academy of New Mexico will establish and maintain an internal control structure to provide management with reasonable assurance that assets are safeguarded against loss from unauthorized use or disposition, that transactions are executed in accordance with management's authorization and recorded properly to permit the preparation of general purpose financial statements in accordance with GAAP, and that state and federal programs are managed in compliance with applicable laws and regulations.

Equip Academy of New Mexico shall develop, establish, and maintain a structure of internal accounting controls and written procedures to provide for segregation of duties, a system of authorization and recording procedures, and sound accounting practices in performance of duties and functions. The duties to be segregated are the authorization to execute a transaction, recording the transaction, and custody of assets involved in the transaction.

Procedures for Internal Control

1. The Head of School is responsible for all tangible and intangible personal property of the school.
2. Access to assets will be limited by assigning primary custodial staff in each departmental location within the school. The control agent for each department is responsible for monitoring the access to the building, classrooms, property, cash, and equipment.
3. Backups of the school's finance documents will be done on a daily basis. Documents such as employee earning records, expenditure ledger, revenue ledger, cash control ledger, check register, bank statements, cancelled checks, purchase documents, blank checks, files, diskettes, and USB drives will be stored in a locked, fireproof file cabinet.
4. Regularly scheduled virus checks on the school's server and hard-drives will be performed.

Property Management

All property owned by Equip Academy of New Mexico is subject to the requirements of 2.20.1 et seq. NMAC. Guidelines for the property management at Equip Academy of New Mexico include, but are not limited to:

1. Equip Academy of New Mexico will adhere to the financial reporting requirements for capital and infrastructure assets.
2. Equip Academy of New Mexico will keep a list of all equipment or property it has leased.
3. All property will be safeguarded and protected to avoid or minimize loss potential.
4. All property will be used economically and for the purpose intended.
5. All property will be inspected upon arrival and periodically to ensure it is in good working order.
6. All Equip Academy of New Mexico staff will be required to report any property that is not in good working order in a timely manner.
7. All property will be properly and accurately recorded in a fixed asset ledger which shall be maintained by the Office Manager. A labeling system will be established by the school so that all property can be tagged as appropriate.
8. All property will be inventoried on a periodic basis to verify the accuracy of records.
9. Any re-location of property shall be noted and kept with the property records.
10. Equip Academy of New Mexico, as a public school, is subject to the same state and federal laws regarding the disposal of equipment purchased with either state or federal funds.

Segregation of Duties

Equip Academy of New Mexico shall ensure that the assignment of staff who have access to the school's financial management system be done so as to limit their ability to cause or conceal errors and/or irregularities. Equip Academy of New Mexico will take care to not assign all functions to one person. Equip Academy of New Mexico will ensure that additional administrative review and oversight procedures will increase security.

Our control procedures are those policies and procedures in addition to the control environment and accounting system that management has established to provide reasonable assurance that specific objectives will be achieved. We have devised, established, and continuously strive to maintain a structure of internal accounting controls to provide that the following are in place:

- Segregation of responsibilities to ensure that the following duties are segregated: authorization to execute transaction, recording transaction, and custody of assets involved in transaction.
- System of authorization and recording procedures to ensure that all transactions are properly approved and recorded.
- Sound accounting practices are in place in the performance of duties and functions. This includes varied error-checking routines that are performed in connection with record keeping and comparing recorded amounts with existing assets and liabilities. Appropriate action shall be taken with respect to any differences.
- Employees handling significant amounts of cash must be adequately bonded. Access to assets is permitted only in accordance with proper authorization.

- Receipts, checks or warrants, purchase requisitions, purchase orders, and vouchers shall be sequentially pre-numbered.
- Proper safeguards are in place to protect unused checks, other pre-numbered forms, cash that has not been deposited, and other receipts.
- All transactions are recorded as necessary to permit preparation of the financial statements in conformity with Generally Accepted Accounting Principles (GAAP).
- Independent checks on performance and proper valuation of recorded amounts are being performed including clerical checks, reconciliations, comparison of assets with recorded accountability, computer-programmed controls, management review of reports that summarize the detail of account balances, and user review of computer generated reports.

Check signing authority will be vested in one primary person, the Head of School, with the following two exceptions: Exception #1 - Purchases of \$5,000 or above, which will require two signatures, that of the Head of School and an authorized officer of the Board. Two or more signatures in these cases will be required to guard against misuse or fraud. The segregation of duties and the authorization and recording procedures as described below states which person will perform particular functions as it relates to the school's finances. Exception #2 - In the event that the Head of School is not available, an authorized officer of the Board may sign in the place of the Head of School.

FINANCIAL ORGANIZATIONAL STRUCTURE

Pursuant to 6.20.2.12 NMAC, Equip Academy of New Mexico has established the following organizational structure in which the delegation of responsibility for employee actions is combined with sufficient authority to perform the assigned activities.

Head of School

Equip Academy of New Mexico will employ an experienced Head of School whose work is guided by applicable state and federal laws and regulations as well as by established internal controls. The Head of School is responsible for the financial functions of the school, including maintaining the integrity of all financial reporting, budgeting and forecasting, planning, personnel record keeping, and insurance administration.

Finance Committee

The Finance Committee is a committee of the Governing Board that meets monthly, at a minimum. This committee meets with the Head of School, oversees development of the budget and strategic financial plans, and monitors the financial operations of the school. The members of the Finance Committee will review bank reconciliations and other financial reports with the Head of School.

Monthly Financial Reports

The Business Manager will prepare monthly financial reports as well as NMPED-required reports for presentation to the Finance Committee, which will then co-present the information to the Governing Board at its monthly meeting.

Audit

Pursuant to Section 12-6-3, NMSA 1978, Equip Academy of New Mexico will participate in the annual audit as scheduled by the NMPED. The NMPED auditor will have access to all Equip Academy of New Mexico accounting documents, and the Equip Academy of New Mexico staff and business

management services provider will fully cooperate with the auditor(s). Equip Academy of New Mexico's administration will resolve audit findings and report this information to NMPED in a timely fashion. Equip Academy of New Mexico recognizes that it is responsible for paying its proportionate share of the audit costs as the budget reflects. For all funds, the audit balances will be compared to cash reconciliations and general ledgers. If changes are required on the cash reconciliations or general ledgers, the auditor will be requested to provide the adjusted journal entries so they can be posted by the Head of School. A copy of the corrected cash reconciliations will be sent to NMPED.

A chart of accounts, budget submissions, and reporting deadlines will be met in accordance with the NMPED requirements by establishing a system of reports as guided and developed by NMPED through the use of a financial management system such as AptaFund. In accordance with Governmental Accounting Standards Board (GASB) Statement No. 14, "The Financial Reporting Entity," Equip Academy of New Mexico will comply with all standards for financial reporting. All reporting to NMPED will comply with the Charter Schools Act regarding site-based accountability. Annual audit procedures will be in place to comply with all federal, state, and NMPED requirements.

Employee Accountability

The Equip Academy of New Mexico Governing Board is responsible for setting all school policies, including fiscal, as well as hiring and evaluating the Head of School and oversight of the school's operations. Implementation of the policies established and execution of the day-to-day operations of the school is the responsibility of the Head of School. The assignment of duties to staff members who have access to the school's accounting system will be done with the intent of limiting their ability to cause and conceal errors or irregularities. Incompatible functions will not be assigned to one staff member.

Insurance

Pursuant to 6.20.2.20 NMAC, Equip Academy of New Mexico shall maintain adequate insurance coverage addressed in: the Tort Claims Act, Section 41-4-1 et seq., NMSA 1978; the Workers' Compensation Act, Section 52-1-1 et seq., NMSA 1978; Insurance of Public Buildings, Section 13-5-1 et seq., NMSA 1978; Officers and Surety Bonds, Section 22-5-7, NMSA 1978; and the Public School Insurance Authority Act, Sections 22-2-6.1 through 22-2-6.10, NMSA 1978.

General Ledger

Equip Academy of New Mexico will establish and maintain a general ledger in accordance with GAAP. The general ledger will comprise individual funds and account groups using the NMPED Uniform Chart of Accounts and shall be reconciled every month.

Fund and Account Groups

Equip Academy of New Mexico shall use funds and account groups to report its financial position and operating results.

Chart of Accounts

Equip Academy of New Mexico shall prepare, maintain, and report budget and financial information utilizing the Standard and Uniform Chart of Accounts that is recognized, used, and available through the NMPED.

Basis of Accounting

In accordance with GASB 34, Equip Academy of New Mexico shall use a full accrual basis of accounting in preparation of annual financial statements and cash basis of accounting for budgeting and reporting. Equip Academy of New Mexico will use an accounting system that is used widely in New Mexico and is compatible with state required reporting and formats, such as AptaFund.

Financial Statements

Financial statements are the responsibility of the school. Equip Academy of New Mexico shall maintain adequate accounting records, prepare financial statements in accordance with GAAP, specifically GASB 34, and provide complete, accurate, and timely information to the independent public accountant (IPA) as requested. If there are differences between the financial statements, Equip Academy of New Mexico's records, and NMPED records, the IPA will provide the adjusting entries to Equip Academy of New Mexico to reconcile the report in the school's records. Equip Academy of New Mexico will disclose in the notes to the financial statement if the IPA prepared the financial statements. All efforts will be made by Equip Academy of New Mexico to assist the IPA with financial statement preparation.

Financial and Compliance Audit

Equip Academy of New Mexico shall have a yearly independent audit performed on its financial records as required by Section 12-6-3, NMSA 1978.

Financial Records

The Head of School for Equip Academy of New Mexico shall be responsible for ensuring that all financial records and supplies are safeguarded from potential theft and destruction. All financial records at Equip Academy of New Mexico shall be kept up-to-date and available for inspection at any time after reasonable notice. Financial records will be retained as required by the Records Center, Records Retention and Disposal Schedule for New Mexico Public Schools, and 1.20.2 et seq. NMAC. Pursuant to 1.13.20.1 NMAC, the Equip Academy of New Mexico Head of School shall be aware of the requirements for Disaster Recovery Backup Files with respect to the safeguarding of all student and financial records. Financial Reports Financial reports reflecting the financial and budget position of Equip Academy of New Mexico shall be provided to the Governing Board on a monthly basis. Financial reports required by NMPED shall be submitted no later than the last day of the month following the end of the reporting period. The Governing Board shall be notified of any report which has not been submitted on a timely basis and the reason(s) for the late filing.

CASH CONTROL STANDARDS

Equip Academy of New Mexico will establish and maintain a cash management program to safeguard cash and shall provide prompt and accurate reporting that adheres to cash management requirements of the Office of Management and Budget (OMB) Circular A-102, and applicable state and federal laws and regulations.

Cash Controls Policies and Procedures

1. Equip Academy of New Mexico shall issue a factory pre-numbered receipt for all money received. Pre-numbered receipts are to be controlled and secured. If a receipt is voided, all copies shall be marked "VOID" and retained in the receipt book.

2. The bank deposit slip shall have the numbers from applicable receipts entered on it or attached as a reference.
3. A cash receipts journal is prepared during each fiscal year beginning July 1st and ending June 30th, and is presented to the NMPED auditor during the annual audit.
4. The school shall verify that there is sufficient cash and budget prior to the disbursement of cash.
5. Equip Academy of New Mexico has established a cash control ledger for each fund/sub-fund. Interfund transfers of cash among separate and distinct funds are not receipts or expenditures. Transfers of cash previously received in a prior fiscal year require Governing Board and NMPED approval prior to the transfer.
 - a. Temporary transfers of cash are posted as "due from" and "due to" to indicate inter-fund receivables and payables.
 - b. Posting errors are not erased, crossed out, or modified in any other manner in the ledger. A separate journal entry is required to incorporate necessary corrections. Cross-referencing of a correcting entry to the original error should be inserted under the "description" column of the ledger.
6. Check stock will be completely blank and not include the schools account, routing or check number. When a check is printed from the accounting software, it will then print the applicable information onto the check. All blank checks shall be properly safeguarded.
7. Completed vouchers and supporting documentation is to be placed in numerical order and filed for future reference and annual audit.
 - a. Each warrant or check issued shall have printed on its face the words, "void after one year from date." Whenever any warrant or check remains unpaid for one year, the Business Manager shall cancel it in accordance with Section 6-10-57(A), NMSA1978.
 - b. The Business Manager shall keep a register of all canceled warrants/checks. The register shall show the number, date, amount, name of payee, fund out of which it was payable, and date of cancellation. The face amount shall revert and be credited to the fund against which the warrant/check was drawn.
8. The school maintains a cash control ledger for each fund/sub-fund where all transactions affecting cash are recorded. Cash balances reported to the NMPED shall be the same as reflected in the school's cash control ledger and annual audit.
9. All bank accounts shall be reconciled on a monthly basis. Reconciled bank statements are to be prepared by the Business Manager and reviewed by the Finance Committee. The bank statement, deposit slips, and canceled checks shall be made available to the NMPED auditor during the annual audit.

Receipt of Funds

1. All receipt books are located with the Office Manager for security purposes and will only be issued to staff member(s) designated by the Head of School.

2. Receipts will be preprinted, pre-numbered, and kept in sequential order. The Office Assistant, or another designated employee, shall receive cash and prepare a receipt in triplicate for money received from all sources. The original receipt is to be retained in the receipt book, the second copy is to be given to the person(s) making the payment, and the third copy will be given to the Business Office along with the respective cash/checks for proper recording in the school's accounting system. If a receipt is voided, all copies of the receipt shall be stamped "VOID" and retained in the receipt book.
3. The Assistant Business Manager will record all cash receipts into the Aptafund accounting software and the Business Manager will approve the transaction.
4. Equip Academy of New Mexico shall safeguard and account for all cash and checks received, and shall deposit funds in the appropriate account at a federally insured bank within twenty-four (24) hours of receipt or one (1) banking day as required by state law NMAC 6.2.2.14.3. The bank shall carry sufficient pledge collateral to cover 50% of the uninsured FDIC balance.
5. The Office Manager shall prepare the bank deposit by providing receipts for all cash and checks that need to be deposited and providing this to the Head of School.
6. The Head of School will then verify the deposit against the receipts and prepare the deposit slip and make all deposits, with an authorized member of the Board as the back-up in the absence of the Head of School.
7. The Head of School will provide a copy of the deposit slip to the Business Manager who will cross check that the receipts match the deposit.
8. The Head of School will verify all deposits are made within twenty-four (24) hours.
9. The Business Manager will post the revenue to the appropriate fund and revenue code.
10. For purposes of segregation of duties, the actual bank deposit shall not be made by the individual who is responsible for preparing the receipt for the deposit. Deposits will be made by the Head of School and as a backup by an authorized member of the Board. After the deposit is made, the deposit receipt shall be given to the Office Manager who shall staple it to the copy of the deposit ticket and the Business Office will retain the record of deposit provided by the bank.

Special Revenue Funds

All proposals prepared by the school staff for special funding require administrative approval from the Head of School. Upon receipt of an award notice, a budget adjustment request is processed and submitted to the Head of School for review and processing. New award budgets are presented to the Governing Board and then forwarded to the NMPED for approval. Final approved budgets are returned to the Business Manager and are entered into the financial management system. The Head of School and the Business Manager monitor special revenue budgets. The designated staff member acts as the control agent and is responsible for monitoring compliance issues in his/her area

Receipt of Goods

All goods purchased by the school are delivered directly to the school. It is the responsibility of the Office Assistant to sign for delivery and the Office Manager will remain responsible for opening the packages. The Office Manager is not only responsible for opening the box(es), but also for obtaining the packing slip(s) and reviewing them for accuracy. The packing slip will be reviewed for accuracy,

stamped, and dated as received, signed by the Office Manager, and given to the Business Manager. Once the invoice is received, the Assistant Business Manager will check the packing slip against the original PO. If everything is correct and the contents of the entire purchase were received and documented on the packing slip, the invoice will be matched to the original PO and the packing slip is available. This packet will then be ready to process a check.

If anything is incorrect with the order, the Office Manager will immediately contact the vendor for a return/credit to the account. When discrepancies occur, they are investigated and resolved by the Office Manager within fourteen (14) days from receipt of the goods.

Accounts Receivable

The Business Manager is responsible for billing and monitoring the collection of all amounts due from outside agencies. The Business Manager is responsible for tracking and verifying cash balances for all federal, state, and other grants and contracts awarded to the school. The Business Manager prepares the required cash requests, reimbursement reports, and invoices necessary for collection of amounts due to various programs.

Procedures for Cash Disbursement

Pursuant to NMAC 6.20.2.14, Equip Academy of New Mexico shall establish a cash management program to safeguard all cash in its custody and control. Payment for the purchase of supplies, equipment, services, utilities, fixed charges, contract reimbursements, and other expenditures of the school shall be made by check. Before a check can be issued, the following is required:

1. If a contract is in place, the contract must be signed and approved prior to any disbursement of checks. All contracts must follow state procurement procedures.
2. All tax-information as required by state law must be on file, including but not limited to, a W-9 prior to disbursement of funds.
3. All mail is received by the Office Assistant. The Office Assistant opens and date stamps all mail with the exception of bank statements. Bank statements are not opened by the Office Assistant, but instead the envelope is stamped and the unopened statement is given to the Head of School.
4. The Assistant Business Manager will match all invoices to the original purchase order, signed packing slip, and purchase requisition prior to disbursement of funds. If changes are required, a change order is generated.
5. The Assistant Business Manager will present the entire packet to the Head of School for payment processing and filing of the original paperwork. The Head of School will sign off as ok to pay for the packet. The Assistant Business Manager will input the invoices into the AptaFund AP module and the Business Manager will review and approve.
6. The business management services contractor will ensure that all invoices are paid in order to take advantage of all applicable discounts, and avoid any hardships to vendors.
7. All paid invoices are to be filed by batch and placed into a fireproof filing cabinet for future reference and for the annual audit.

8. Equip Academy of New Mexico shall administratively control and restrict accessibility to check stock by using completely blank check stock. Only properly designated employees shall handle impressed funds and disbursement of funds.
9. Equip Academy of New Mexico shall utilize a computerized accounting program to print checks. The charter school's blank check stock shall be printed at the time the check is being printed, and not included on the actual checkstock.
10. All checks, disbursement vouchers, and check requests shall be reviewed and approved for payment by the Head of School and the Business Manager prior to disbursement of funds.
11. All checks will be made payable to specified vendors or payees and shall not be made payable to cash.
12. Voided checks shall be stamped VOID and properly defaced by removing the area of the signature line and retained in a file for inspection by management as well as external auditors.
13. Support for payment shall be attached to a check when presented for signature. In addition, all original check requests and invoices attached for support shall be defaced by a stamp indicating "PAID," the check or warrant number, and the date paid.
14. The signing of blank checks is strictly forbidden.
15. For segregation of duty, the Head of School or an authorized member of the Board shall be authorized to sign checks under \$5,000. The Head of School shall be the primary signature unless he/she is unavailable. Two signatures will be required on all checks \$5,000 and over. The second signatory can be the Head of School or any authorized officer of the Governing Board.
16. Any check issued to the Head of School must be signed by a member of the Governing Board.

Reimbursement

Equip Academy of New Mexico requires that all purchases, other than recurring costs, be requested through the purchase order process. Any needed supplies for instruction should be ordered via the school's purchasing order process. Reimbursement for purchases will only be made on an exceptional basis, if prior approval has been obtained from the Head of School, a Request for Reimbursement Form has been completed, and a purchase order has been created. All requested reimbursement must be itemized on a Request for Reimbursement Form; only if the request is approved in writing by the Head of School may the purchase be made. To receive reimbursement, all original receipts must be attached to the Request for Reimbursement Form and the Request for Reimbursement Form must be signed by the employee and approved by the Head of School prior to the purchase being made. A Request for Reimbursement Form may be obtained from the staff lounge. A reimbursement check issued to the Head of School must be signed by a member of the Governing Board.

Voucher System

1. The voucher system will be administered by the business office.
2. Documentation will be attached to the voucher, including the PO, invoice, shipping receipt, bids, or quotes.

3. Accounting codes from the Uniform Chart of Accounts are used for posting purposes (fund/sub-fund, function, object codes, program, location, job classification, etc.).
4. Paid vouchers will be certified pursuant to Section 6-5-8 NMSA.
5. Vouchers will be filed numerically by month paid.
6. Check register will be maintained, listing outstanding checks, and it will tie to the cash report/total outstanding to date.

Bank Reconciliation

Pursuant to NMAC 6.20.2.14 (K), Equip Academy of New Mexico will establish a cash management program to safeguard all cash in its custody and control, which will include monthly reconciliation of all bank accounts. The bank reconciliation identifies the item(s) that must be recognized in order to arrive at the actual cash balance.

1. Equip Academy of New Mexico shall have all bank statements received on a monthly basis.
2. The unopened bank statement will be received and opened by the Head of School. The Office Manager will stamp the outside of the banking envelope, but will not open the bank statement.
3. Upon review of all bank statements by the Head of School, the Business Manager shall be responsible for the reconciliation of all existing bank accounts. This will be done on a monthly basis.
4. The Head of School shall review the activity contained on the bank statement and verify that there are no errors or omissions when compared to amounts shown in the respective general ledger cash account.
5. Adjustments to the school's cash accounts, for items such as bank charges, must be made via a journal entry in the school general ledger and must clearly identify the reason(s) for the adjustment(s) in the description.
6. The bank reconciliation shall be prepared in the accounting software. The reconciliation for any given account shall include checks and deposits outstanding when arriving at an adjusted balance per bank when compared to the general ledger.
7. Deposits in transit and outstanding checks should generally clear the bank within the first few days of the following month. Any check which is more than twelve (12) months old shall be voided and the vendor to whom the check was issued shall be informed.
8. The bank reconciliation must be completed as expeditiously as possible after the receipt of the bank statement to ensure that the cash account balance as shown in the school's general ledger is as accurate as possible.
9. Upon completion of the bank reconciliation for a given month, the Business Manager shall inform the Finance Committee, who shall be responsible for reviewing the reconciliations together.
10. Copies of all bank reconciliations must be kept by the Business Office for the period prescribed by law for the retention of public school records as well as for review by external auditors or other interested parties.

Policy and Procedures for Petty Cash Disbursement

Petty cash funds shall be utilized only in rare instances to facilitate small payments. Petty cash funds are established by drawing a check made payable to the employee charged with responsibility for the fund. The petty cash fund shall contain cash and/or invoices totaling the full amount of the petty cash fund and is to remain at the amount originally established.

1. Petty cash funds are to be reflected on the school's balance sheet as cash on hand.
2. Petty cash and change funds shall not be used to make loans to employees or for cashing checks.
3. Petty cash may not contain more than \$100.
4. Change funds shall be established pursuant to school procedure.

Equip Academy of New Mexico will obtain sufficient coverage through the New Mexico Public Schools Insurance Authority for persons who handle or manage cash or funds. The coverage shall include Faithful Performance, Depositors Forgery, Money and Securities, and Credit Card Forgery.

Employees may be reimbursed through petty cash funds for small, incidental, necessary items that an individual purchases with personal funds because time constraints preclude using normal procurement methods. Examples of this include, but are not limited to, office and operating supplies, postage, etc.

1. The school shall keep the petty cash fund separate from other funds. The total amount of petty cash kept on hand by the school shall not exceed \$100.
2. The petty cash fund shall be stored in a locked fire-proof safe or file cabinet in the main office.
3. The fund will be reconciled at the close of each business day and the appropriate reimbursement ordered by the Head of School from the operating fund whenever necessary. The employee who reconciles the fund will not be the same employee responsible for the disbursement of petty cash.
4. The petty cash fund is subject to random cash counts by management as well as audit by external auditors.

The petty cash receipt is to be completed in the following manner:

1. The petty cash receipt is to be completed in duplicate.
2. The receipt shall include the name of the employee who is receiving reimbursement and the date the reimbursement is made.
3. The exact description for the transaction.
4. The total amount of reimbursement.
5. The completed receipt must be validated by the person authorized to obligate funds for the amount of reimbursement.
6. An original receipt shall be retained with the original petty cash voucher, and the duplicate copy shall be retained in the receipt book.

INVESTMENTS

Pursuant to 6.20.2.15 NMAC, Equip Academy of New Mexico will utilize effective cash and investment management to establish and maintain mutually beneficial banking relationships, accurate forecasting of cash requirements, and prudent investments designed to maximize returns within the full extent allowed by statute.

Investment Policies and Procedures

Equip Academy of New Mexico shall account for public money placed in any interest-bearing account in accordance with 22-8-40 (C) through (G) NMSA 1978; Section 6.10-17 and 6.10.31 NMSA, and any other federal and state laws which apply to the investment of public school funds.

Banking

1. Pursuant to 22-8-37 and 22-8-40 NMSA 1978, Equip Academy of New Mexico shall adhere to all regulations concerning the deposit of public school funds for all funds in its custody and control.
2. Pursuant to 6-10-16 through 6-10-17, NMSA 1978, and 6.20.2.15 NMAC, Equip Academy of New Mexico will notify the financial institution, which is the custodian of the school funds, that the school receives state money and is subject to a 50% collateralization requirement for amounts above \$100,000.
3. Equip Academy of New Mexico shall deposit all cash receipts within twenty-four (24) hours as required by 6.20.2.14 C NMAC.

PURCHASING

Pursuant to 6.20.2.17 NMAC, Equip Academy of New Mexico will establish and implement written policies and procedures for purchasing which are in compliance with the New Mexico Procurement Code, Section 13-1-28 et seq., NMSA 1978. Purchasing policies and procedures for grant funding will comply with requirements established within the grant and the Procurement Code.

Purchasing Policies and Procedures

All Equip Academy of New Mexico employees will follow established policies in purchasing supplies or materials for day- to-day operations of the school, equipment, and furniture. (Note: Purchases made with school activity fund monies shall be governed by a school activity funds policy.) Equip Academy of New Mexico will make diligent efforts, when purchasing goods or services, to obtain the best prices possible without sacrificing necessary quality or service, in accordance with the requirements of the Procurement Code. Purchases will be made in a fair and impartial manner without the appearance of impropriety. The provisions of the New Mexico Procurement Code, as applicable to charter schools, are adopted as the purchasing policy of Equip Academy of New Mexico. All procurement shall be achieved by the competitive sealed bid process or proposal process pursuant to NMSA 1978 Sections 13-1-102 to 12-1-117 of the Procurement Code, except as exempted from the provisions of the Procurement Code, and except for procurement achieved pursuant to the sections of the Procurement Code relating to:

- small purchases
- sole source procurement

- emergency procurement
- existing contracts
- purchases from Antipoverty Program Businesses
- cooperative procurement
- procurement under existing contracts

Requirements for Purchasing

1. The Chief Procurement Officer for the school will be the Head of School and the alternative procurement officer for the school will be the Office Manager, once hired.
2. All purchase requisitions by all staff members are submitted to the Head of School, Chief Procurement Officer (if different), and the Business Manager for approval.
3. After approval, the purchase requisition is turned into a pre-numbered Purchase Order by the Business Manager and is recorded as an encumbrance on the financial management system.
4. The Office Manager will place the order.
5. Upon arrival, the receipt of goods is verified against the packing slip by the Office Manager.
6. The packing slip is then given to the Assistant Business Manager and verified against the purchase order.
7. The purchase order will stay open in the accounting system until the order is complete and ready for payment at which time the purchase order and supporting documentation (requisition, packing slip, and invoice) will be submitted for approval of payment and after approval, paid to the vendor.
8. Under no circumstances will any employee commit Equip Academy of New Mexico to any purchase without a Purchase Order in place.
9. Goods and services up to \$20,000 may be obtained from the best obtainable source, considering cost, service, delivery, and prior use of similar goods. Quotes are not required, but are strongly recommended to ensure the best obtainable price is achieved.
10. For purchases between \$20,001- \$60,000 it is recommended that three written quotes shall be obtained for goods and services when there are competitive vendors.
11. Professional service contracts under \$60,000 will only require the approval of the Head of School.
12. Professional service contracts that exceed \$60,000 will be required to follow the procurement process.
13. Sole source procurement will be based on a written determination that only one source is practically available for a particular good or service. Sole source procurement may be made without formal sealed bidding or competitive negotiation. Any purchase(s) deemed a sole source is/are subject to 13-1-126 and 13-1-128 NMSA 1978.
14. Emergency procurement will occur only when it fulfills the requirements identified in 13- 1-127 (B) 1-3, NMSA 1978. Emergency procurement may be made without formal sealed bidding or competitive negotiation with a written justification for the emergency, identification of the goods and/or services being procured, and the name and date of the contractor/entity selected.

15. Purchases made from vendors on a valid state contract through the State of New Mexico Purchasing Agency shall be deemed to have been made in conformance with the requirements for quotes or bids.
16. Cooperative purchasing agreements may be entered into, at the discretion of Equip Academy of New Mexico, pursuant to 13-1-135, NMSA 1978.
17. Subject to #11 and #12, above, all contracts with the school shall require approval by the Head of School. No warrant, check, or other negotiable instrument shall be issued in payment for any purchase of services or construction of items of tangible personal property unless all services and construction of tangible personal property have been received according to the agreed upon terms.
18. All employees will abide by the Procurement Code. The Procurement Code can be found in the school's business office.
19. The Head of School of Equip Academy of New Mexico shall develop and implement any administrative procedures necessary to administer this policy.
20. All functions of procurement carried out by the Head of School can be carried out by an authorized member of the Board in the absence of the Head of School

Bidding/RFP Procedures

1. All bids for supplies, materials, equipment, and contractual services in excess of the amounts listed above shall be submitted in sealed envelopes addressed to Equip Academy of New Mexico's Head of School or his/her designee, and plainly marked with the name of the bid. Advertised bids shall be opened at the time and place specified, and all bidders and other persons shall be invited to attend. The school shall follow the applicable provisions of the Procurement Code in the bidding/RFP process.
2. Bids and proposals must include all pertinent information to be considered valid, i.e. scope of work, price, specifications, etc.
3. The Equip Academy of New Mexico Governing Board reserves the right to reject any or all bids and accept the bid which appears to be in the best interest of Equip Academy of New Mexico. The Governing Board reserves the right to waive any informality in, or reject any or all bids, or any part of any bid. The Board reserves the right to exercise all options set forth in the invitation documents. Any bid may be withdrawn prior to the scheduled time for the opening of bids. Any bid received after the time and date specified shall not be considered.
4. The bidder to whom the bid is awarded will be required to enter into a written contract with Equip Academy of New Mexico.

Contracts

All bids, proposals, contracts, and purchase orders shall be administered through the school by the Head of School. Contracts and lease-purchase agreements should be submitted to Equip Academy of New Mexico's legal counsel for review and approval prior to execution.

PAYROLL

Pursuant to 6.20.2.18 NMAC, Equip Academy of New Mexico's proposed payroll policies and procedures are found below and comply with state and federal regulations on payroll. Their purpose

is to maintain strict internal controls, close supervision, and financial accounting in accordance with GAAP.

Equip Academy of New Mexico will maintain and have available for inspection the following employee record documentation: employment contracts (including increments), personnel/payroll action forms, certification records, employment eligibility verification (federal form I-9 for citizenship certification), federal and state withholding allowance certificates, pay deduction authorizations, pay or position change notices, Educational Retirement Act plan application, and direct deposit authorizations.

Payroll Policies and Procedures

1. The Head of School is responsible for hiring and firing school employees, authorizing salaries including employment contracts, and maintaining staffing levels approved in the annual budget.
2. The approved employment contracts are entered into the AptaFund Accounting system and generate encumbrances for the salary and benefit amounts.
3. The Office Manager is responsible for tracking and reporting absences. Leave request forms should be submitted at least four (4) days prior to payroll being processed. These reports are submitted to the Head of School and are used to update employee leave balances. Leave taken without sufficient leave balances are docked from the employee's pay during the pay period that the leave was taken.
4. Pursuant to the adopted policy, all employees shall be paid every two (2) weeks unless specified otherwise in their employment contract. In the event that the pay period ends on a holiday or on a day that the school is closed for business, payment will be made the preceding workday.
5. Any overtime that is worked must be approved in advance by the Head of School.
6. Based upon the Fair Labor Standards Act (FLSA), employees who are eligible for overtime (non-exempt) pay will be compensated in the following manner:
 - a. All hours worked up to forty (40) hours in one workweek are to be paid at the staff member's regular hourly rate. Hours worked in excess of forty (40) hours in any one work week must be paid at time and one-half the regular hourly rate in accordance with law.
 - b. Overtime pay is computed only on hours worked. If an employee uses a vacation and/or sick day(s) and works extra hours during the same workweek, payment will be paid at the regular hourly rate until the actual hours worked reaches forty (40) hours before any overtime will be calculated.
 - c. In the case of a non-exempt staff member whose pay rate is quoted on other than an hourly basis, the charter school business office will calculate hourly equivalent pay for overtime purposes.
 - d. Any deviation from the assigned working hours must be approved in advance by the Head of School.
7. The charter school is required by law to deduct Medicare, Federal Income Tax, and State of New Mexico Withholding Tax. Except for Medicare, which is a fixed percent, the amounts

withheld for Federal and State of New Mexico is based on the number of exemptions a staff member claims on the withholding exemption certificate (W-4) at the time of employment or as changed by the staff member subsequent to employment. The school will deduct for Social Security if a section 218 agreement is passed.

8. The charter school is required by law to withhold amounts for State of New Mexico Educational Retirement Board (ERB) and ERA Retiree Health Care for those employees who meet the FTE or other requirements established by each entity. Amounts withheld are remitted to the respective entities in the employee's name by the due dates specified.
9. The withholding for an employee's portion of selected insurance coverage(s) shall be deducted in advance from the employee's pay in semi-monthly installments for the following monthly premium. All insurance and other deductions are submitted to the Head of School on proper forms and records of these deductions are kept on file by the Head of School.
10. Equip Academy of New Mexico will maintain time records through timesheets for part-time and non-exempt employees. This is the official time record for employee compensation.
 - a. Part-time employees must record the start time of their work day and the end time at the end of their work day.
 - b. Any deviation from assigned working hours must be approved by the Head of School in advance.
 - c. Continual and/or repeat deviations from assigned working hours will be grounds for disciplinary action. These deviations include, but are not limited to, time changes without prior approval and tardiness.
 - d. Any employee that leaves the campus during the workday must check out in the main office and complete a Request for Leave form, except for when leaving for a duty free lunch. Upon returning to work, the employee must check in. Falsification of records or documentation is a violation of Equip Academy of New Mexico policy and may result in both employees receiving disciplinary action in accordance with Equip Academy of New Mexico's Employee Handbook.
11. A copy of the sign-in log will be retained by the Office Manager for auditing purposes.
12. A summary sheet reflecting salaried and hourly employee pay must be reviewed and verified by the Head of School prior to the issuance of check/vouchers.
13. In addition to required contributions to the Educational Retirement and ERA Retiree Health Care previously mentioned, employees may choose elective deferrals to a qualified 403(b) plan of their choice. The business office shall deduct the amount specified by the employee and remit payment in the employee's name monthly or as required by the plan. The business office shall be aware of IRS contribution limits for elective deferrals and make sure there are no excess contributions to qualified plans.
14. Should a notice of garnishment be received by Equip Academy of New Mexico, the employee will be contacted so every effort can be made to have him/her satisfy the creditor and have the garnishment withdrawn. In the event a release of garnishment cannot be obtained, the school shall acknowledge the wage assignment as required by law and remit the amount withheld to the appropriate agency.

15. Equip Academy of New Mexico shall provide direct deposit for staff members with any valid bank or credit union in the United States.
16. The Head of School is the primary individual responsible for approving payroll. In an extreme situation, in the absence of the Head of School, the Office Manager will approve payroll. This will only be done in extreme situations where the Head of School is not available.
17. All functions of payroll handled by the Head of School can be handled by an authorized member of the Board who will approve payroll in the absence of the Head of School.

TRAVEL AND TRAINING

Pursuant to 6.20.2.19 NMAC, Equip Academy of New Mexico travel policies and procedures will be in compliance with the Per Diem and Mileage Act, Sections 10-8-1 through 10-8-8, NMSA 1978 and NMPED Finance and Administration (DFA) regulations.

Equip Academy of New Mexico's Governing Board recognizes that the educational program for Board members, staff, and students can be enhanced through the prudent selection of off-campus experiences. Consistent with NMSA 1978 Section 22-8B-5.1, Equip Academy of New Mexico's Governing Board will attend annual Board development and training. The objective for the Equip Academy of New Mexico Board, staff, and student travel is to be clearly defined and consistent with the intent of any legislative mandates, the charter, curricular goals, or a teacher's goals (e.g., team building). Travel requiring an overnight stay must be based on a verifiable education-related activity or pursuant to the Governing Board's and/or staff's training mentioned above. It is understood that the general purpose of student travel, whenever necessary, is to supplement the school's educational program. The Head of School will develop procedures and specific guidelines for all local and out of state travel for the Governing Board, staff, and students.

Travel Policies and Procedures

1. Equip Academy of New Mexico will work diligently to ensure that all travel costs be kept as low as possible without compromising the safety of the Governing Board, staff, students, or activity sponsors (if required).
2. Equip Academy of New Mexico's staff and student travel must be approved in advance by the Head of School after all safety, supervision, and educational justification (if any) has been verified. Approved field trip request forms and employee travel requests must be completed and maintained on file.
3. Travel for the Head of School must be approved in advance by an officer of the Board.
4. Employees and Board members are expected to account for all necessary expenditures while traveling. Reimbursement shall be made in full only for original itemized receipts submitted. No reimbursement shall be made for alcoholic beverages.
5. Employees and Board members shall be expected to return as soon as reasonably possible after a conference and/or professional development workshop(s). Expenses for extended stay in a geographic area after attendance at conferences or other professional development shall be the sole responsibility of the employee and/or Board member.
6. All reimbursements are processed in accordance with the Per Diem and Mileage Act, as outlined in DFA regulations. All receipts for out-of-pocket expenditures for transportation,

registration, and miscellaneous expenses are required for any reimbursement. DFA regulations can be found in the Head of School's office.

7. Student travel will be allowed in school-insured vehicles, such as activity buses. Students may travel with his/her own parent/guardian with an appropriate consent or release form.
8. No student shall be required to participate in academic school-sponsored travel activities. Non-participation shall not result in a loss of credit, reduction of grade, or any other negative consequence to the student.
9. Written permission for students to travel will be secured from parents/guardians. Consent forms may be signed at the beginning of each school year giving permission for students to participate in all in-state field trips.
10. Academic and behavior standards shall be established prior to the commencement of any trip. Board members, staff, students, and activity sponsors who travel on behalf of the school reflect positively on the school and the community.

INSURANCE

Pursuant to 6.20.2.20 NMAC, Equip Academy of New Mexico maintains adequate insurance coverage addressed in: the Tort Claims Act, Section 41-4-1 et seq., NMSA 1978, the Workers' Compensation Act, Section 52-1-1 et seq., NMSA 1978; Officers and Surety Bonds, Section 22-5-7, NMSA 1978; and the Public School Insurance Authority Act, Sections 22-2-6.1 through 22-2-6.10, NMSA 1978.

Surety bonds paid from the operational sub-fund shall be approved by the NMPED and filed with the Office Manager of the NMPED of finance and administration pursuant to Subsection D of Section 22-5-7, NMSA, 1978.

FIXED ASSETS

Establishing guidelines for the control of all capital assets, that are owned by the school will assist Equip Academy of New Mexico in protecting capital assets, preserving the life of capital assets, and avoiding unnecessary duplication of assets on the school campus, to provide a guide for future replacement of assets, and to establish a basis for the amount of insurance coverage required.

Asset Capitalization

The purpose of an asset capitalization policy is to provide guidelines for the control of all capital assets that are owned by the school. The purpose of the controls are to protect capital assets, preserve the life of capital assets, to avoid unnecessary duplication of assets on the school campus, to provide a guide for future replacement of assets, and to establish a basis for the amount of insurance coverage required.

Capital Assets Defined

For the purpose of internal controls, Capital Assets are defined as tangible or intangible property owned by the school, which meets the definition and minimum dollar amount for capitalization per asset category.

1. Furniture and equipment - Tangible property in excess of \$5,000 purchased or acquired by gift to be used for operational purposes including, but not limited to, desks, filing cabinets, copiers, musical instruments, laboratory equipment, and janitorial equipment.
2. Computer software - Intangible property in excess of \$5,000 either purchased or acquired by gift that is designed to cause a computer to perform a desired function.
3. Computer equipment - Tangible computer equipment in excess of \$5,000, including but not limited to laptops, desktops, routers, hubs, etc., purchased or acquired by gift, to be used for operational or instructional purposes. For capitalization purposes, computers are defined as a CPU, monitor, and keyboard, which go together as a package. Printers, which exceed \$5,000, shall be capitalized separately, while printers which are less than \$5,000 shall be considered supply assets and recorded as such in the school's general ledger.
4. Library holdings - All library holdings purchased or acquired by gifts during the fiscal year are capitalized in aggregate at the end of the fiscal year using the cost-based method. The cost-based method approach entails the following:
 - Acquisition costs reflect actual expenses for purchased library materials.
 - Donations are capitalized at fair market value.
 - A value is placed on items withdrawn from the inventory and that value is reflected in capitalization.

Donated Items

Donated items, valued at the threshold contained in this capitalization policy and which are items that the school otherwise would have bought and used in operations, shall be recorded in the school's general ledger account titled "Fixed Assets" (\$5,000 and over) at fair market value at the date of donation. Donated items which are valued at less than the threshold contained in this capitalization policy will be recorded in the school's general ledger account titled "Supply Assets" (less than \$5,000) at fair market value at the date of donation. Donated items which are determined to have no fair market value will not be recorded.

Depreciation Guidelines

Depreciation is a system of accounting which aims to distribute the cost or gift value of a capital asset, less salvage value, over the estimated useful life of the asset in a systematic and rational manner. All depreciable assets will be depreciated using the straight-line method of allocation utilizing the half-year convention. The straight-line method allocates an equal amount of the net cost of an asset to each accounting period in its useful life. Most assets retain some recovery at the end of their useful lives, which is known as salvage value. All depreciable property for the purposes of this policy shall be deemed to have a fair market value at the end of their useful lives.

The useful life of depreciable assets is based on their usefulness to the school. The following table displays the estimated useful lives that will be used to calculate and allocate depreciation:

Property Category	Life in Years
Furniture and Equipment	5
Computer Software	3
Computer Equipment	5
Library Holdings	5
Transportation Equipment	3-5

School Buses	7-10
Land	39
Lease Hold Improvements	20

Disposal of Capital Assets

Capital assets which are obsolete, worn out, or no longer meet the requirements of the school, may be disposed of pursuant to NMSA (1978) 13-6-1 to 13-6-4, Sale of Public Property, transferred within the school campus to another department or classroom, or traded-in. A Fixed Asset Disposal Form must be completed in all cases for the disposition of any asset, including those which were damaged or stolen, and a Fixed Asset Relocation Form must be completed when assets are transferred from one location to another. The Fixed Assets Disposal Form must be signed by the Head of School, Contracted IT and Data Coordinator(s) (for computer related items only), and the Governing Board Chair. Pursuant to NMSA (1978) 13-6-1 and 13-6-2, all licensed software and any electronic media (computer hard drives) must be completely erased before being disposed of. The Fixed Assets Relocation Form must be signed by the Head of School and contracted IT and Data Coordinator(s) (for computer-related items only). The school business office will retain the approved forms to preserve the accuracy of the asset records.

General Inventory

Procedures

1. An inventory of all assets, including but not limited to, capital assets will be created and a copy of the list will remain at the school. Other pertinent information such as room, department, manufacturer, and model shall also be recorded on the list.
2. A physical inventory shall be done at least annually on such date(s) and time(s) as specified by the Head of School .
3. A label or a tag will be attached to the property in a conspicuous location.
4. Equip Academy of New Mexico will reconcile any missing or found items.
5. A sign-out log for borrowed equipment will be maintained.
6. A central record of repairs and transfers will be maintained.
7. Equip Academy of New Mexico will follow state laws and regulations regarding the disposal of obsolete, surplus, or damaged equipment.

OTHER SERVICES

Pursuant to 6.20.2.23 NMAC, Equip Academy of New Mexico provides the following policies for food service, legal fees, state and federal flow through funds, direct funds, student activity funds, and joint powers agreements.

Food Services

Food service funds are to be accounted for in the special revenue fund or the enterprise fund. All monies collected from the sale of food for the food service operation are to be accounted for in accordance with GAAP, U.S. Department of Agriculture (USDA) requirements, and Section 22-13-13, NMSA 1978.

Legal Fees

Equip Academy of New Mexico's funds shall not be used for payment of personal legal fees, including attorney's fees and costs, of any Equip Academy of New Mexico employee or Equip Academy of New Mexico Governing Board member. Personal legal fees include but are not limited to:

- legal fees expended in obtaining or retaining any elected position;
- legal fees incurred by any employee or Board member in any civil action filed by or against the employee or Board member in his or her personal capacity, unless, in the case of an action against the employee or Board member, the allegations are based upon acts taken by that individual in the course and scope of his or her employment or service;
- legal fees incurred by any employee or Board member in the defense of any criminal case, unless the charges are based upon acts taken in the course and scope of his or her employment or service; and
- any payment of legal fees by Equip Academy of New Mexico will serve a clearly identifiable public interest.

Federal/State Grant Flow through Funds

For grant money that flows through the NMPED to Equip Academy of New Mexico, the charter school shall utilize the funding for the purpose in which it was awarded. Equip Academy of New Mexico will provide information and submit complete and accurate reports required by the grant and the NMPED within the prescribed time. This funding shall be accounted for in the Equip Academy of New Mexico ledger in accordance with GAAP, applicable federal regulations, and procedures set forth in the grant award.

Federal/State Grant Direct Funds

For grant money that is sent directly to Equip Academy of New Mexico, the charter school shall utilize the funding for the purpose in which it was awarded. Equip Academy of New Mexico shall submit complete and accurate reports required by the grant within the prescribed time. This funding shall be accounted for in accordance with GAAP, applicable federal regulations, and procedures set forth in the grant award. Student Activity Funds In general, student activity funds are those funds that are owned, operated, and managed by students under the guidance and direction of a staff member for educational, recreational, and/or cultural purposes. The Head of School is authorized to approve the formation of all class organizations, clubs, and associations and before any fundraising can be done. The advisor from the organization must receive prior approval from the Head of School in order to establish the class organization, club, or association prior and must receive prior approval from the Head of School to engage in any fundraising activities.

Activity Fund Policies

1. Projects that raise student activity funds should contribute to the educational experience of students and not be in conflict with, but rather add to, the existing curriculum.
2. Student activity funds, whenever possible, should be spent for the benefit of those students currently enrolled in the school who have contributed to the accumulation of these funds.

3. Student activities should be conducted so that they offer minimum competition to any commercial concerns, while still benefiting the student body as a whole.
4. All activity fund receipts and disbursements must be documented in accordance with established cash receipts and cash disbursements procedures.

Activity Fund Procedures

1. The teacher or staff in charge of the student activity will be responsible for receipting funds collected with the support of the Office Manager.
2. Cash receipts for student activity funds, with pre-numbered receipts, will be issued to the advisor and copies of the receipts along with the funds collected will be submitted to the Office Manager for deposit and then the deposit information will be provided to the Assistant Business Manager for entry into the school's accounting system.
3. The teacher or staff in charge of the student activity will adhere to the twenty-four (24) hour banking rule outlined in NMAC 6.22.14.3 by providing funds to the Office Assistant in a timely manner so that funds can be accounted for and deposited by the Office Manager within twenty-four (24) hours of being collected by the advisor.
4. In the case of an off-site activity such as an intramural sports function, the teacher or advisor in charge of the activity will ensure that all cash is accounted for. It is recommended that two people independently verify cash receipts and, after arriving at the same conclusion, place their initials on a count sheet verifying that all receipts have been tallied. The count sheet shall be given to the Office Assistant for verification.
5. In a situation where activity fund receipts are taken after school hours, the teacher or advisor in charge of the activity shall make sure that all receipts are properly safeguarded pursuant to NMAC 6.2.2.14.1.
6. The teacher or advisor in charge of the activity shall adhere to the school's adopted policy regarding the procedures for the receipt of funds at all times.
7. The procurement policy for student activity funds requires that state procurement code is adhered to. Under no circumstance will an activity commit Equip Academy of New Mexico to any purchase without proper approval.

Joint Powers Agreements

Should Equip Academy of New Mexico enter into a joint powers of agreement, pursuant to the Joint Powers Agreement Act, Sections 11-1-1 through 11-1-7, NMSA 1978, it shall be done so in accordance with the agreement.

OTHER ADMINISTRATIVE STANDARDS

Pursuant to 6.20.2.24 NMAC, Equip Academy of New Mexico will adhere to the state and federal laws and regulations pertaining to instructional materials, transportation, records retention and disposition, and the Open Meetings Act.

Instructional Materials

Equip Academy of New Mexico shall be funded for textbooks and supplementary instructional materials by the NMPED pursuant to the Instructional Materials Act, Section 22-15-9 NMSA 1978.

Equip Academy of New Mexico shall submit revenue and expenditure reports as required to the NMPED, detailing expenditures, purchase order number, warrant number, and dates. Audited instructional material records are the official accounting of these funds. The instructional materials purchased by the charter school shall be in accordance with the approved list and may be amended by the Instructional Materials Unit of the NMPED.

Transportation

When Equip Academy of New Mexico has proper funds to provide bussing, Equip Academy of New Mexico will provide limited student transportation with select bus stops located around Albuquerque. Additionally, transportation will be provided to any student where transportation is designated by the student's Individual Educational Plan (IEP). If at any time a special education student enrolls at Equip Academy of New Mexico with an IEP that requires transportation, the school will negotiate with a transportation contractor to provide transportation services for that student. Equip Academy of New Mexico will pay the initial costs for the transportation of special education students as required by their IEP until Federal IDEA money is available.

Records Retention and Disposition

The management of school records will be in accordance with the Public Records Act, Section 14-3-1 et seq., NMSA 1978 and applicable regulations.

Open Meetings Act

Equip Academy of New Mexico will comply with the provisions of the Open Meetings Act, Section 10-15-1 et seq.,

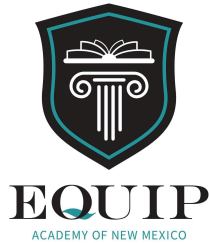
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6.20.2.11 NMAC [INTERNAL CONTROL STRUCTURE STANDARDS]:

- A. Every school shall establish and maintain an internal control structure to provide management with reasonable assurance that assets are safe-guarded against loss from unauthorized use or disposition, that transactions are executed in accordance with management's authorization and recorded properly to permit the preparation of general purpose financial statements in accordance with GAAP, and that state and federal programs are managed in compliance with applicable laws and regulations. The internal control structure shall include written administrative controls (rules, procedures and practices, and policies that affect the organization) and accounting controls (activity cycles, financial statement captions, accounting applications including computer systems) that are in accordance with GAAP.
- B. Each school shall develop, establish and maintain a structure of internal accounting controls and written procedures to provide for segregation of duties, a system of authorization and recording procedures, and sound accounting practices in performance of duties and functions. The duties to be segregated are the authorization to execute a transaction, recording the transaction, and custody of assets involved in the transaction.
 - a. School management must ensure that protection of the public trust is a major focus when granting the authorization to execute business of the school district.
 - b. Employees handling significant amounts of cash must be adequately bonded. Access to assets is permitted only in accordance with school authorization.

- c. Receipts, checks or warrants, purchase orders, and vouchers shall be sequentially prenumbered.
 - d. School districts shall have proper safeguards to protect unused checks and other prenumbered forms, undeposited cash and other receipts, and facsimile signature plates.
 - e. Transactions are to be recorded as necessary to permit preparation of financial statements in conformity with GAAP. In addition, school districts shall establish any other criteria applicable to such statements to maintain accountability for assets.
 - f. School districts shall conduct independent checks on performance and proper valuation of recorded amounts, such as clerical checks, reconciliations, comparison of assets with recorded accountability, computer-programmed controls, management review of reports that summarize the detail of account balances, and user review of computer generated reports.
- C. An internal control structure is required to demonstrate the school district's ability to record, process, summarize and report financial data consistent with the following financial statement assertions:
- a. rights and ownership
 - b. existence and occurrence
 - c. valuation and allocations
 - d. completeness
 - e. presentation and disclosure.
- D. The internal control structure shall demonstrate that the school identifies applicable laws and regulations, and that procedures are designed to provide reasonable assurance that the school complies with those laws and regulations. Internal control procedures shall be established, implemented, and documented through school correspondence, manuals, training, and other additional methods. Appropriate internal control procedures shall be adopted by the local board within a school to safeguard its assets, check the accuracy and reliability of its accounting data, promote operational efficiency, and encourage adherence to prescribed managerial policies. The internal control structure shall address all school transactions. [02-03-93, 11-01-97, 01-15-99; 6.20.2.11 NMAC - Rn, 6 NMAC 2.2.1.11, 05-31-01].

K-5 LEAD TEACHER JOB DESCRIPTION



Why Work at Equip Academy of New Mexico

We firmly believe that access to a quality education is a social justice and equity issue, and we equip underserved populations who have historically underperformed with a transformative K-5 education. With a firm belief that students can rise to the occasion we set before them, excellence is held high for leaders, educators, and students through our supportive and measurable approach.

Ensuring that our students have the skills, tools, and confidence they need to thrive today and in the future, we are dedicated to having a workforce that mirrors the diversity seen in our students and community. Providing a community of support and belonging, leaders, teachers, and families collaborate closely and encourage each other to achieve great outcomes.

Our school honors, nurtures, and challenges the whole child. We foster critical thinking skills and a love of learning through an engaging, inquiry-based learning approach and data-responsive education. All students benefit from a rich and rigorous curriculum that fosters curiosity about the world and guides them to think critically and independently.

Mission

By providing a top-tier, inquiry-based, college-preparatory education, Equip Academy of New Mexico ensures K-5 students master the knowledge and skills to dream audaciously, engage deeply, and pursue a life of purpose.

Vision

Every child has the opportunity to live out their greatness; our commitment is to equip them to do so. Our joyful, engaging, high-expectations approach prioritizes measurable academic learning, celebrates student curiosity and community, and reimagines what a successful, literacy-rich K-5 school can be.

Values

- **Excellence.** We strive for excellence in all we do.
- **Question.** We question until we understand.
- **Urgency:** We move with purpose, urgency and intentionality.
- **Independence.** We are critical and independent thinkers.
- **Partnership and Perseverance.** We believe in the trifecta of success: Students + Teachers + Families = Student Maximum Potential AND We don't give up. We embody perseverance by adopting a growth mindset and can-do attitude.

General Job Description

At Equip Academy, we are looking to expand our team with mission-aligned educators. We are looking for educators who are passionate about making an ambitious and measurable difference in the lives of New Mexican children. We are looking for growth-mindset educators who are relentless about perfecting their craft and growing student achievement. Through our Institute for Educator Excellence, teachers are supported to reach master-teacher status with opportunities for in-house, upward professional growth. Educators are valued and invested in through training, daily coaching, and feedback. Teachers spend their time discussing, preparing, practicing, and immersing themselves in rich academic content through an inquiry-based lens. Equip Academy teachers wear the hat of a facilitator and truly listen to what students are saying, creating a space for students to think their way through to answers and praising their insights and curiosities along the way. Equip Academy teachers have a hunger for feedback and professional growth, and a dedication to excellence in all they do. Our teachers embrace a rigorous, literacy-rich program and a positive approach to accountability for themselves and students. Teachers here believe in the power of family and are committed to believing in and constantly helping students succeed to be independent, critical thinkers.

Professional Responsibilities

- Develop and teach engaging lessons that follow rigorous, Common Core-aligned curriculum
- Actively participate in collaborative planning, professional development (Wednesday afternoons, full day PDs, and three-week Summer Institute), and actively work to internalize lessons, incorporate feedback, and be prepared at a high level for every class every day
- Accept ultimate responsibility as the academic and cultural leader of their classroom and ensure academic progress of his or her students and support Instructional Assistant (if applicable)
- Use formal and informal assessment data to drive instruction and ensure student mastery of standards
- Build and center community and belonging for all students while simultaneously holding accountability
- Establish and maintain frequent and clear communication to ensure strong relationships with staff, students, and families
- As a founding educator, be able and willing to wear multiple “hats” and roles and responsibilities, such as, but not limited to, morning, lunch, and dismissal duties

Minimum Qualifications

- Equip Academy Mission and Vision alignment
- Bachelor’s degree required and State teacher license (required)
- Eager to learn, receive, utilize, and implement feedback to improve practice
- Growth mindset, grit, and determination for self and students
- Relentless drive to set / achieve ambitious goals especially toward closing achievement gaps
- Strong collaboration and teamwork skills
- SpEd and/or TESOL certified (preferred)
- Bilingual (English/Spanish) (preferred)
- Criminal background clearance (required)

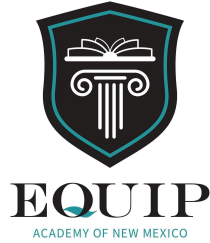
Staff and Reporting Relationships

The K-5 Lead Teacher reports to the Head of School.

Compensation

Salary for this position is competitive and commensurate with experience.

INSTRUCTIONAL ASSISTANT JOB DESCRIPTION



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General Job Description

At Equip Academy, we are looking to expand our team with mission-aligned Instructional Assistants. We are looking for educators who are passionate about making an ambitious and measurable difference in the lives of New Mexican children. We are looking for growth-mindset educators who are relentless about perfecting their craft and growing student achievement. Through our Institute for Educator Excellence, teachers are supported to reach lead-teacher status with opportunities for in-house, upward professional growth. Educators are valued and invested in through training, daily coaching, and feedback. Teachers spend their time discussing, preparing, practicing, and immersing themselves in rich academic content through an inquiry-based lens. Equip Academy teachers wear the hat of a facilitator and truly listen to what students are saying, creating a space for students to think their way through to answers and praising their insights and curiosities along the way. Equip Academy teachers have a hunger for feedback and professional growth, and a dedication to excellence in all they do. Our teachers embrace a rigorous, literacy-rich program and a positive approach to accountability for themselves and students. Teachers here believe in the power of family and are committed to believing in and constantly helping students succeed to be independent, critical thinkers.

Professional Responsibilities

- Develop and teach engaging lessons that follow a rigorous Common Core-aligned curriculum
- Actively participate in collaborative planning, professional development (Wednesdays, full day PDs, and three-week Summer Institute), and actively work to internalize lessons, incorporate feedback, and be prepared at a high level
- Accept ultimate responsibility as the academic and cultural leader of their classroom and ensure academic progress of his or her students and support the Lead Teacher (LT) and students
- Use formal and informal assessment data to drive instruction and ensure student mastery of standards
- Build and center community and belonging for all students and families while simultaneously holding accountability
- Establish and maintain frequent and clear communication to ensure strong relationships with staff, students and families
- As a founding educator, be able and willing to wear multiple “hats” and roles and responsibilities, such as but not limited to, morning, lunch and dismissal duties

Minimum Qualifications

- Equip Academy Mission and Vision alignment
- Eager to learn, receive, utilize, and implement feedback to improve practice
- Growth mindset, grit and determination for self and students
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- Strong collaboration and teamwork skills
- Bilingual (English/Spanish) (preferred)
- Criminal background clearance (required)

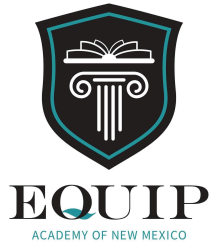
Reporting Relationships

The Instructional Assistant reports to the Head of School.

Compensation

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OFFICE MANAGER



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General Job Description

The job of the Equip Academy of New Mexico Office Manager includes: providing secretarial and administrative support to the Administration; communicating information to students, parents, staff, and/or other districts or schools; ensuring compliance with financial, legal, and administrative requirements; and supporting the broad array of services provided to students, parents, instructional and support employees.

Professional Responsibilities

- Manage the operation of the Equip Academy of New Mexico office
- Serve as building receptionist; answer phone and in-person inquiries from students, staff, parents and the public; screen calls for the Head of School, staff, and students
- Receive and distribute daily mail
- Act as secretary to the Head of School, assist in scheduling calendar and appointments
- Compile data for enrollment and other reports for state reporting
- Format and type correspondence, forms, memoranda, and reports
- Make copies and assist with copies of staff bulletin and school newsletter
- Record and transcribe meeting minutes as needed
- Coordinate work of staff assigned to office; assign and review work; monitor and adjust work load for even distribution
- Coordinate activities of parent volunteers; provide volunteer training; assign and reviews tasks
- Maintain current listings of volunteers
- Register incoming students and process enrollment materials; complete data input on computer; coordinate services and information with sending/receiving school and district offices; complete procedures for students withdrawing from the school
- Maintain student attendance records; alert Head of School to student attendance problems; contact parents to verify absence of students
- Maintain records and files for staff and student information; maintain staff absence records
- Assist with assignment and release of substitute personnel
- Receipt of Goods intake
- Support STARS reporting and other require PED reports
- Submit daily lunch count; may generate and print weekly lunch roster
- Schedule building use; monitor building keys
- Assume critical role in Equip Academy Safety and Security, Emergency Response Team
- Troubleshoot problems with office equipment and calls for service as necessary
- Write work orders for custodial personnel
- Communicate with the transportation department concerning transportation arrangements
- Make requisitions and receives, account for and distribute school supplies, textbooks, and materials; take periodic inventory
- Coordinate a variety of programs as requested, such as voter registration, federal survey, school pictures, school insurance and other activities; coordinate with families on a variety of activities
- Supervise students who come into the office
- Provide clerical assistance to teachers and itinerant staff, as time allows or as authorized by Head of School
- Make non-instructional decisions as needed during the Manager of Operation and Head of School's absence
- Promote effective public relations with parents and the general public
- Support the Manager of Operations with various duties
- Administer first aid and parent-authorized medication to students for the purpose of meeting their immediate health care needs
- Assist other personnel as may be required for the purpose of supporting them in the completion of their work activities
- A part of the of the Financial Leadership and Management Team: Project revenue, activity fund procedures, budget maintenance standards, financial reporting, property management, receipts of funds, recipes of

goods, bank reconciliation, payroll policies and procedures, upkeep and maintain documents pertaining to auditing purposes

- Serve as the Chief Procurement Officer and support with requirements of purchasing
- Support with all booking filed studies as well as logistics, chaperones and bussing
- As a founding staff member, be able and willing to wear multiple “hats” and roles and responsibilities, such as, but not limited to, morning, lunch, and dismissal duties
- Eager to learn, receive, utilize, and implement feedback to improve practice, growth mindset, grit, and determination for self and students and relentless drive to set and achieve ambitious goals especially toward closing achievement gaps
- Conduct other tasks as may be assigned by the Head of School

Minimum Qualifications

- Strong belief in the mission and vision of Equip Academy of New Mexico
- Excellent organizational, planning, and implementation skills
- Ability to manage and lead people and provide performance management
- Ability to communicate and interact effectively with multiple constituencies
- Experience in maintaining accounting ledgers, operating a computer, and using school-specific software applications
- High school graduation or equivalent and two years of office experience with increasing responsibility, including records maintenance, bookkeeping, and experience in working with children and the public
- Previous school office manager/secretary experience (required)
- Knowledge of correct grammar, spelling, and English usage, and ability to accurately perform arithmetic calculations
- Knowledge of general bookkeeping procedures and secretarial procedures
- Proficient in daily use of school software programs
- Skill in operating general office machines
- Ability to attend to detail and follow tasks through to completion
- Ability to establish and maintain positive, effective working relationships with students, parents, staff, and the general public, contracted services and maintain confidentiality
- Ability to work effectively under pressure, be flexible, and organize and set priorities
- Criminal background clearance (required)
- Bilingual (required)
- Valid health/first aid card (preferred)

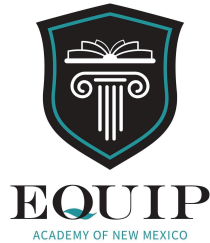
Reporting Relationships

The Office Manager reports to the Manager of Operations.

Compensation

Salary for this position is competitive and commensurate with experience.

OFFICE ASSISTANT



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General Job Description

The job of the Equip Academy of New Mexico Office Assistant supports the Head of School, Office Manager and Manager of Operations with a range of tasks which includes: providing secretarial and administrative support to the Administration; communicating information to students, parents, staff, and/or other districts or schools; ensuring

compliance with financial, legal, and administrative requirements; and supporting the broad array of services provided to students, parents, instructional and support employees.

Professional Responsibilities

- Supports Office Manager by serving as needed as building receptionist; answer phone and in-person inquiries from students, staff, parents and the public; screen calls for the Head of School, staff, and students
- Receive and distribute daily mail and incoming packages
- Compile data for enrollment and other reports for state reporting
- Format and type correspondence, forms, memoranda, and reports
- Make copies and assist with copies of staff bulletin and school newsletter
- Record and transcribe meeting minutes as needed
- Support Office Manager in the coordination of work of staff assigned to office; assign and review work; monitor and adjust workload for even distribution
- Support Office Manager in the coordination of activities of parent volunteers; provide volunteer training; assign and reviews tasks
- Support Office Manager in the maintenance of current listings of volunteers
- Support Office Manager in the registration of incoming students and process enrollment materials; complete data input on computer; coordinate services and information with sending/receiving school and district offices; complete procedures for students withdrawing from the school
- Support Office Manager in the maintenance student attendance records; alert Head of School to student attendance problems; contact parents to verify absence of students
- Support Office Manager with the maintenance of records and files for staff and student information; maintain staff absence records
- Submit daily lunch count; may generate and print weekly lunch roster
- Assume critical role in Equip Academy Safety and Security, Emergency Response Team
- Troubleshoot problems with office equipment and calls for service as necessary
- Communicate with the transportation department concerning transportation arrangements
- Support Office Manager in making requisitions and receives, account for and distribute school supplies, textbooks, and materials; take periodic inventory
- Coordinate a variety of programs as requested, such as voter registration, federal survey, school pictures, school insurance and other activities; coordinate with families on a variety of activities
- Supervise students who come into the office
- Provide clerical assistance to teachers and itinerant staff, as time allows or as authorized by Head of School
- Make non-instructional decisions as needed during the Head of School and Office Manager's absence
- Promote effective public relations with parents and the general public
- Perform similar, related duties as assigned, related to the Office Manager
- Administer first aid and parent-authorized medication to students for the purpose of meeting their immediate health care needs
- Assist other personnel as may be required for the purpose of supporting them in the completion of their work activities
- A part of the of the Financial Leadership and Management Team: receipts of funds, receipt of goods, procedures of cash disbursement, and activity fund procedures
- Support with all booking filed studies as well as logistics, chaperones and bussing
- As a founding staff member, be able and willing to wear multiple "hats" and roles and responsibilities, such as, but not limited to, morning, lunch, and dismissal duties
- Eager to learn, receive, utilize, and implement feedback to improve practice, growth mindset, grit, and determination for self and students and relentless drive to set and achieve ambitious goals especially toward closing achievement gaps

Minimum Qualifications

- Strong belief in the mission and vision of Equip Academy of New Mexico
- Excellent organizational, planning, and implementation skills
- Ability to manage and lead people and provide performance management
- Ability to communicate and interact effectively with multiple constituencies
- Experience in maintaining accounting ledgers, operating a computer, and using school-specific software applications
- High school graduation or equivalent and two years of office experience with increasing responsibility, including records maintenance, bookkeeping, and experience in working with children and the public
- Bachelors or masters preferred
- Previous school office manager/secretary experience preferred
- Knowledge of correct grammar, spelling, and English usage, and ability to accurately perform arithmetic calculations
- Knowledge of general bookkeeping procedures and secretarial procedures
- Proficient in daily use of school software programs
- Skill in operating general office machines
- Ability to attend to detail and follow tasks through to completion
- Ability to establish and maintain positive, effective working relationships with students, parents, staff, and the general public, and maintain confidentiality
- Ability to work effectively under pressure, be flexible, and organize and set priorities
- Criminal background clearance (required)
- Bilingual preferred
- Valid health/first aid card (preferred)

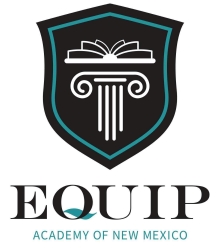
Reporting Relationships

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Compensation

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MANAGER OF OPERATIONS



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General Job Description

The Manager of Operations will assist the Head of School in ensuring that the school is safe and compliant with all local, state and federal rules and guidelines, and that the school systems run efficiently. The Manager of Operations

supports facilities, operations, budget, human resources, student information systems, and family and community engagement.

Professional Responsibilities

The Manager will work in four primary areas to ensure that day-to-day operational activities and community engagement activities of the school are running effectively and successfully.

1. Operations

- **Data Management.** Oversee data collection and maintenance (attendance, assessment results, progress/report cards)
- **Procurement.** Ordering office, classroom, technology, custodial, maintenance supplies and record-keeping
- **Facility Management.** Manage custodial staff; coordinate and manage renovation/upgrade projects troubleshoot resolving emergent issues on a daily basis
- **Process Improvement.** Improve and implement procedures in front office, cafeteria, and student flow
- **Transportation and Food Service.** Maintain strong and collaborative relationships with food service and transportation contractors to ensure timely, reliable, and safe delivery of services
- **Family and Community Engagement.** Work closely with community partners who provide programming for students and families, including managing communication and logistics

2. Human Resources

- **Liaison.** Manage human resource operations and serve as liaison with Public Education Department
- **On/Off Boarding.** Manage teacher and staff on-boarding and off-boarding, including, but not limited to, performance of background checks and creation of personnel files
- **Lead Performance Management.** Process for all operations staff at the school level and maintain confidential employee files for performance reviews
- **Compliance Maintenance.** Ensure school-level HR compliance with various employment-related government agencies, maintain personnel files, and administer benefits

3. Administration

- **Liaison.** Support Head of School as school-level point-of-contact with City of Albuquerque; function as school's first point of contact for parents, community, contractors, and suppliers on all non-instructional elements of school operations
- **Outreach.** Participate in the school community as full member of the staff, including, but not limited to, assisting the Head of School with leading student and staff recruitment, planning of school-wide events, and participating in all-staff retreats and team-building
- **Management.** Manage the efforts of all non-instructional staff such as office manager, Office Assistant, custodial staff, school nurse, volunteers, and contractors
- **Other.** As a founding staff member, be able and willing to wear multiple "hats" and roles and responsibilities such as, but not limited to, morning, lunch and dismissal duties; Eager to learn, receive, utilize, and implement feedback to improve practice, growth mindset, grit and determination for self and students and relentless drive to set and achieve ambitious goals especially toward closing achievement gaps

4. Business and Finance

- **Financial Leadership and Management Team:** Project revenue, activity fund procedures, budget maintenance standards, financial reporting, property management, receipts of funds, recipes of goods, bank reconciliation, payroll policies and procedures
- **Chief Procurement Officer** support and oversight

Minimum Qualifications

- Strong belief in the mission and vision of Equip Academy of New Mexico
- Business management experience (1-3 years)
- Excellent organizational, planning, and implementation skills
- Bachelor's degree (preferred)
- 2-5 years of experience in operations, business, finance/accounting, and/or education administration (required)
- Ability to lead, to manage multiple priorities and to manage the ambiguity inherent in an entrepreneurial environment
- Ability to manage and lead people and provide performance management
- Ability to communicate and interact effectively with multiple constituencies
- Quantitative skills and experience with financial management
- Criminal background check (required)
- High proficiency in Microsoft Excel, PowerPoint, Word, Outlook required; high proficiency in QuickBooks preferred

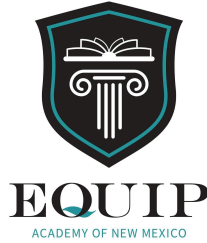
Reporting Relationships

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Compensation

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EDUCATION COORDINATOR



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General Job Description

Equip Academy of New Mexico anticipates a special education population of approximately 20%, with a spectrum of learning needs. Equip Academy's Education Coordinator will play a critical role in ensuring that all of our students with identified special needs receive a quality of education and support needed to be successful in their learning. This individual will be a licensed special education teacher in the State of New Mexico and will have a wide scope of knowledge of special education best practice, including systems of compliance, parent and family engagement, and evidence-based practices for teaching as well as social, emotional, and behavioral support. The Education Coordinator will play a critical role in advancing our schools Mission by being an effective advocate for students with special needs, including Gifted and English Language Learners, and will work collaboratively with other school support personnel, including the School Psychologist, Nurse, Social Worker, and education staff. This individual will provide direct services to students with special education services to model best practices. This individual will also support implementation of assessment logistics, execution and data reporting/analysis for all students, including special populations. This individual will also play a key role on the Equip Academy's Student Assistance Team (SAT) and, when appropriate, support family and community engagement programming.

Professional Responsibilities

- Provide technical assistance on a regular basis to special education teachers regarding the IEP process and compliance issues
- Provide process-based consultation, training, and technical assistance in the areas of compliance, IEP crafting and implementation, and manifestation determinations
- Provide technical assistance to staff in the areas of behavior management, teaching strategies, and learning styles
- Promote the understanding of child development and the effects of learning and behavior
- Assist in the development and implementation of school wide Special Education Professional Development, as well as inform policy and procedure manuals
- Manage the provision of technical assistance to special education teachers regarding program and content planning for students
- Assist in planning, implementing, and monitoring and evaluating individual progress to ensure appropriateness of educational goals and special education services
- Manage any student transitions that take place within the school and the end-of-year transition process between schools for students with special needs
- Assist in the development of technical assistance and policies and procedures manuals for special education staff.
- Provide opportunities for families to learn about school-to-home connections related to overall programming
- As a founding staff member, be able and willing to wear multiple "hats" and roles and responsibilities such as, but not limited to, morning, lunch and dismissal duties
- Eager to learn, receive, utilize, and implement feedback to improve practice, growth mindset; grit and determination for self and students and relentless drive to set and achieve ambitious goals, especially toward closing achievement gaps
- Provide direct services to students with special education services to model best practices
- Oversee assessment logistics, execution, and data reporting/analysis of students, including special populations

Minimum Qualifications

- Strong belief in the mission and vision of Equip Academy of New Mexico
- Excellent organizational, planning, and implementation skills
- Clear and precise written and communication skills that lend well to staff support and training
- Special Education Credential and 1-3 years' experience working in Special Education settings

- Knowledge of state and federal special education regulations and ability to apply this knowledge to daily work
- Ability to build strong relationships with educators, parents, and students
- Assessment and data analysis experience preferred

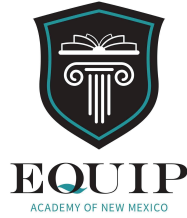
Reporting Relationships

The Education Coordinator reports to the Head of School.

Compensation

Salary for this position is competitive and commensurate with experience.

ASSISTANT PRINCIPAL IN RESIDENCE (APIR)



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Ensuring that our students have the skills, tools, and confidence they need to thrive today and in the future, we are dedicated to having a workforce that mirrors the diversity seen in our students and community. Providing a community of support and belonging, leaders, teachers, and families collaborate closely and encourage each other to achieve great outcomes.

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Mission

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Vision

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General Job Description

Equip Academy's Assistant Principal in Residence (APIR) will work closely with the Head of School (HOS). The APIR will be trained, coached, and mentored by the HOS. The APIR will be trained to drive growth, educational outcomes,

and advance educational equity through leading the team and bringing the mission to life. Like the HOS, the APIR will equip and rally the staff to set and achieve ambitious school goals. Through the intentional creation of a vibrant school community, the APIR inspires staff and students to engage in rigorous and purposeful learning in every classroom, every day. The APIR develops enduring and joyful relationships with students, teachers, parents, and community members, and s/he builds and maintains a strong presence in the local community. This person embodies a deep belief in and powerful ability to want to lead Equip Academy's innovative approaches and unique school features: inquiry-based, educator excellence, college-preparatory, rigorous curriculum, and comprehensive literacy and language acquisition program. The APIR is a junior leader and plays a critical leadership role within the school, and is committed to ensuring that our students develop the knowledge, skills, and confidence to succeed so that they have the opportunity to live out their full potential. The ultimate goal of the APIR is to be trained to transition into an Assistant Principal (AP) role after a year of mentorship.

Professional Responsibilities

- **Educational Leadership.** Guides educational vision to align with current academic standards, accountability goals and metrics, and the unique needs of the student body. Leads, implements, and facilitates teacher development programs, including hiring, training, coaching, and inspiring of a diverse team of educators who work towards dramatically and measurably growing student learning and achievement.
- **Curriculum.** Leads all curriculum development, adoption, and implementation that represents and is proven to powerfully educate a diverse student community. Ensures curriculum in every classroom at every grade level that is thought-provoking, hands-on, engaging, and student-centered, and is supportive of teacher success in its surrounding resources and trainings.
- **Data.** Engages in strategic planning, staff management, and student achievement evaluation to ensure that we demonstrate a record of measurable student achievement, including effective implementation of English Learner and special education strategies, programs, or curricular approaches to eliminating extreme disparities in student outcomes.
- **Budget and Finance.** Manages, monitors, and reports school finances and related activities to ensure that the school remains fiscally responsible and financially healthy in the short- and long-term. Manages complex budget systems, oversees the preparation and maintenance of all purchase orders and other expense records, and approves all expenditures. Ensures that the school reconciles all site records, with monthly reports as required by the PED, and ensures that all expenditures are within budget allowances as approved by the Board for the fiscal year.
- **Culture and Communication:** Demonstrates effective communication with the PED, Board, Community, Families, Staff, Teachers, and Students, interacting with integrity and efficacy with multiple constituencies to promote our mission and grow student achievement. Brings people together, creates a sense of community, and cultivates a rich learning environment that is positive as well as physically and psychologically safe.
- **School Operation and Compliance.** Understands educational policies, ensuring compliance with all state and federal laws and regulations. Understands or has experience with maintenance, operations, payroll, food service, and transportation. Understands records and file keeping, including assessment results, test scores, discipline referrals, medical reports and records, and other student documents. Oversees all day to day operations, including but not limited to ordering and receiving
- **Learner:** Eager to learn, receive, utilize, and implement feedback to improve practice, growth mindset, grit and determination for self and students and relentless drive to grow. Be able and willing to wear multiple “hats” and roles and responsibilities such as but not limited to morning, lunch and dismissal duties

Minimum Qualifications

- Mission- and vision-aligned
- 2-3 years of teaching experience as a lead teacher
- Advanced degree in education or applicable field is preferred
- Leadership experience within a similar educational setting is preferred
- Diverse experience across grades and subjects
- Exceptionally high standards for the quality of work and a reflex to improve at every turn
- Eager to learn and constantly demonstrates a growth mindset
- Record of exceptional student achievement results on external standards-based assessments
- Agility to adapt in an ever changing environment
- Valid Driver's License and Criminal background check (required)

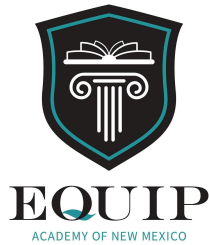
Reporting Relationships

The Principal in Residence reports to the Head of School.

Compensation

The salary for this position is competitive and commensurate with experience. Equip Academy invests in employees by providing ongoing professional development, coaching, and upward career pathways in our school. We are proud to provide a generous benefits package to full time staff, which includes flexibility in our healthcare plan and 403(b).

SCHOOL SOCIAL WORKER



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General Job Description

The Equip Academy School Social Worker provides services to support scholars, families, and staff, including counseling, diagnostic assessment, referrals, and reporting. The Social Worker is deeply committed to changing the lives of our students and s/he leads weekly sessions that target individualized student growth goals. The Social Worker will administer behavioral rating scales, assist in implementation and support of school-wide social and emotional learning practices, and deliver individual or group service minutes as determined by student IEPs. This individual will play a key role on the Student Assistance Team (SAT) and when appropriate, support family and community engagement programming.

Professional Responsibilities

- Serve as a member of the Student Assistance Team (SAT)
- Conduct functional behavioral assessments and create behavior intervention plans (FBA/BIP) as needed for students
- Participate on the MLSS Team and provide services and interventions as assigned, including FBA/BIPs, parent interviews, and psychosocial histories, student referrals, etc.
- Provide individual and group treatment as indicated on Individual Education Plans (IEP) and document all clinical activity
- Write annual IEP goals and notes monthly progress reports related to IEP goals
- Participate in annual IEP meetings and Manifestation Determination Hearings, as needed
- Complete confidential psychosocial histories as part of student evaluations
- Complete diagnostic assessments to identify student needs and making confidential referrals as appropriate
- Consult with appropriate professional staff, external agencies, and other organizations as appropriate and based on student needs
- Document efforts to reach non-responsive students and keep monthly contact sheets
- Complete risk assessments for suicidal/homicidal ideation
- Complete confidential written reports of all cases and meetings and maintain, in a secure location, up-to-date confidential files on every student who receives counseling
- Make and deliver staff presentations of accordance with all confidentiality laws and regulations and complete reports as may be required by federal, state, or local agencies, laws, and regulations
- Eager to learn, receive, utilize, and implement feedback to improve practice, growth mindset, demonstrate grit and determination for self and students and relentless drive to grow. Also be able and willing to wear multiple “hats” and roles and responsibilities such as but not limited to morning, lunch and dismissal duties

Minimum Qualifications

- Strong belief in the mission and vision of Equip Academy of New Mexico
- Active New Mexico school Social Work license
- 1-3 years' experience working as a school counselor or social worker
- Working knowledge of Social Emotional Learning and Responsive Learning practices
- Firm understanding of child and school social work practices
- Excellent communication skills with both children and adults
- Ability to maintain and organize confidential records
- Criminal background clearance (required)
- Understanding and commitment to following all related laws and standards
- Organizational, scheduling and planning skills to manage complex schedules

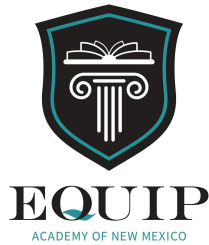
Reporting Relationships

The School Social Worker will be supervised by and report to the Education Coordinator.

Compensation

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BUSINESS MANAGER



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Accounting Partnership with K12 Accounting

Equip Academy of New Mexico plans to partner with K12 Accounting to help with all accounting responsibilities. K12 Accounting is both an ACES and CES vendor and Equip Academy plans to work with them through one of these procurement entities. K12 Accounting comes with a wealth of knowledge, experience and expertise when it comes to New Mexico Public School budget and finance. CEOs Rebekah Runyan and Bryan Runyan have a team of over 30 highly

qualified school finance professionals that have experience supporting over 30 schools to maintain their finances and budgets. Many of the Business Managers and Assistant Business Managers on the K12 Accounting team have prior experience working as external auditors, hold bachelor's and/or Master of Accountancy degrees, and are licensed Level II School Business Officials. K12 Accounting will assign both a highly qualified Business Manager and Assistant Business Manager to work with the Equip Academy on-site to provide high quality business management services. Immediately following the charter approval, the Equip Academy Governing Board will vote on a contract with K12 Accounting to immediately begin providing business management services. As discussed above, this contract will run through either ACES or CES. Qualifications of a Business Manager and Assistant Business Manager responsibilities and qualifications that will meet the needs of the Equip Academy are outlined below.

Professional Responsibilities

- Bachelor's degree in accounting required
- Master's degree in accounting preferred with MBA with CPA
- CPA Proficient using business software (e.g., MS Windows, MS Outlook, MS Word, and MS Excel, Adobe PDF, etc.)
- Proficient using computer equipment and associated peripherals (e.g., computers, laptops, scanners, printers, smart cell phones, etc.)
- Proficient in Cloud computing environment (e.g., MS Office 365, online banking, online storage, etc.)
- Familiarity with accounting concepts and terminology.
- Advanced knowledge of Microsoft computer programs (advanced knowledge of Excel, pivot tables, formulas, etc.)
- Knowledge of database structures, data verification methodology, operating systems, standard software applications.
- Knowledge of payroll accounting.
- Knowledge of school Ability, Visions and/or AptaFund software
- Provide the monthly, quarterly and annually budgetary duties below:

1. Monthly Budgetary Duties

- **Oversee.** Purchasing; Accounts; Cash Receipts; Bank Reconciliations; Federal Program and Payable including Travel & Per Diem
- **Monitor and Maintenance.** Cash Flow; Setup new vendors and customer; Maintains federal funds and reviews spending; Calculate indirect costs and enter journal entries; Submits request for Reimbursement; Journal entries as necessary; Record, analyze and report financial transactions in accordance with General Accepted Accounting Principles (GAAP)
- **Compliance and Reporting.** Ensure compliance with applicable laws, regulations, and rules, Ensure compliance with Public Education Department General Administrative Regulations, Provide the Governing Board with timely, accurate and relevant financial information in the form of a Finance Packet and Report during Governing Board meetings

2. Quarterly Budgetary Duties

- **Review, Reporting and Maintenance.** Provide *all* financial reporting to the New Mexico Public Education Department and required federal agencies including such as Cash Reports, Review Maintenance of Effort, Medicaid Reimbursement, Review Open PO Listing, Prepare and present all Budget Adjustment Requests, as required.

3. Annually Budgetary Duties

- **Grant Support.** Grant applications; Grant amendments; Annual budget preparation; Review federal awards from the prior year that need to be spent by 09/30; Review and create annual vendor contracts;

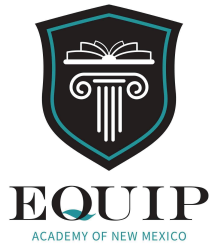
Enter/Import new FY POs for recurrent expenditures; Invest District funds and maintain and review reconciliation of all investments, where applicable;

- **Audit Support.** Oversee audit, provide auditors with all necessary materials, and respond to and clear all audit findings; Present budget to school leadership, Governing Board and New Mexico Public Education Department, and respond to any questions as needed; Effectively handle employee and community complaints, problems and questions related to finance.
- **Evaluation and Systems Improving.** Analyze, develop, and implement policies, procedures and systems that improve the District/School business operations in efficiency and effectiveness; Reviews and approves 1099s; 1099 Electronic Submission; semi-Annual Time & Effort Certifications;

Minimum Qualifications

- Holds a New Mexico School Business Official License
- A minimum of 2 years in School Business Office or similar environment and/or a minimum of 4 years of experience in a supervisory accounting role
- Proficient using business software (e.g., MS Windows, MS Outlook, MS Word, and MS Excel, Adobe PDF, etc.)
- Proficient using computer equipment and associated peripherals (e.g., computers, laptops, scanners, printers, smart cell phones, etc.)
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- Knowledge of database structures, data verification methodology, operating systems, standard software applications.
- Knowledge of payroll accounting.
- Knowledge of school Ability, Visions and/or AptaFund software
- Ability to pass employment verification and background check

ASSISTANT BUSINESS MANAGER



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Professional Responsibilities

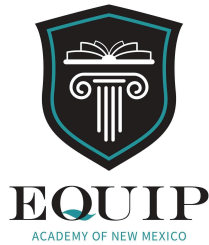
- 1. Complaint Records Maintenances for K12:** HR files for all employees; Vendor files for all vendors; Procurement files (as necessary); Payroll records; Budget Adjustment Requests ; Grants & associated Requests for Reimbursement; Governing Council Meeting Packets and record keeping;
- 2. HR and Payroll:** Collecting and entering timecards; Collecting and entering employee leave; Print Payroll checks; Reconcile Payroll Liabilities; and much more
- 3. Purchasing activities:** Process all Purchase Requisitions; Place approved orders; Process order receipts; Enter invoices; Print A/P checks
- 4. Support the following activities as necessary:** Budget development; Financial audit; Fiscal Year End transition
- 5. Records and Materials:** Enter cash receipts; Maintain Capital Asset and Inventory records; Scan and upload all document to K12 Accounting Cloud storage and Support Business Manager as necessary

Minimum Qualifications

- Associates Degree with two semesters of accounting and/or business administration preferred:
- Bachelor's Degree in accounting and/or business administration
- One year in School Business Office or similar environment or one year working as an accountant or bookkeeper for CPA or accounting firm (experience requirement waived for new/recent college graduates)
- Proficient using business software (e.g., MS Windows, MS Outlook, MS Word, and MS Excel, Adobe PDF, etc.)
- Proficient using computer equipment and associated peripherals (e.g., computers, laptops, scanners, printers, smart cell phones, etc.)
- Proficient in Cloud computing environment (e.g., MS Office 365, online banking, online storage, etc.)
- Familiarity with accounting concepts and terminology
- Ability to pass employment verification and background check

DEAN OF CULTURE AND COMMUNITY

NOTE: This role is not in the budget because it will be introduced year six (6) at full enrollment during year six (6)



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General Job Description

The Dean of Culture and Community (DCC) is passionate about creating and maintaining a safe and joyful environment that centers belonging for students, families, and staff. The DCC: (1) Oversees Responsive Classroom, restorative practices, and equality for all students; (2) Works directly with students with exceptional skills to break barriers that are otherwise preventing students' academic, social, and emotional growth, and; (3) Coordinates family events/workshops during the evenings or weekends. The ultimate goal for the DCC is to create, oversee and implement school-wide systems and procedures that result in positive outcomes for students and their overall experience with school. This individual will also play a key role on the Equip Academy's Student Assistance Team (SAT) and when appropriate, support family and community engagement programming.

Professional Responsibilities

The Dean of Culture and Community will do work in three primary areas to ensure school-wide systems and procedures result in positive outcomes for students.

1. School Culture

- Co-lead the planning and execution of Tier 1 - Tier 3 interventions, including serving as a model and delivering feedback to strengthen interventions
- Lead and manage culture data systems (i.e., attendance, referrals, and logical consequences), related communication structures, and data-driven action plans that ensure data is used to strengthen school and classroom culture
- Partner with the leadership team in leading school-wide community meeting as well as opening and closing circle planning and execution
- Partner with the SAT team to implement strong MLSS systems that continuously provide the highest leverage support for vulnerable students

2. Family and Community Partnership(s)

- Lead and drive the school's family partnership vision and strategic plans, including establishing partnership guidelines and support that results in reciprocity amongst our schools, our families, and our communities, and drive learning from and with each other
- Coach and manage staff to achieve family communication vision and expectations, including providing effective family communication that benefit student learning
- Plan, execute, and reflect on family/community events and workshops/trainings based on family/community needs for the school
- Review and monitor tracking tools and utilize data to manage student and family participation/volunteerism and retention.

3. Fostering Equity for All

- Model and support a race equity culture, including skill-building and leading self and others through awareness, growth, and development
- Partner to plan and execute individual or team activities with systems that support continuous improvement with a focus on diversity, equity, inclusion, anti-racism, and excellence
- Serve as the Equity Council liaison
- Coach and develop staff, including planning and leading professional development, on behavior management, responsive classroom, and social-emotional learning
- Develop teachers' ability to foster and maintain a safe and culturally responsive classroom that results in care and accountability to ensure that all students, including those with exceptionalities, have the access and support needed to achieve and demonstrate readiness for the next grade

Minimum Qualifications

- Strong belief in the mission and vision of Equip Academy of New Mexico
- Commitment to anti-bias, antiracist educational practices
- Excellent organizational, planning and implementation skills
- Minimum of a BA degree and 3 years' experience working in community engagement and/or outreach
- Established networks within the local community (preferred)
- Excellent track record of developing community relationships that align with student need and school direction
- Eager to learn, receive, utilize, and implement feedback to improve practice, growth mindset, demonstrate grit and determination for self and students and relentless drive to grow. Also be able and willing to wear multiple "hats" and roles and responsibilities such as but not limited to morning, lunch and dismissal duties

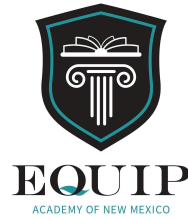
Reporting Relationships

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Compensation

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HEAD OF SCHOOL JOB DESCRIPTION



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Values

Equip Academy students, staff and families embody our Core Values, knowing they are essential for success and growth.

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Job Description

The Head of School (HOS) is the academic and cultural leader of the school.

The HOS creates the school-wide vision, drives educational outcomes, and advances educational equity through leading the team and bringing the mission to life, and the HOS is passionate about equipping and rallying the staff to achieve ambitious school goals. Through the intentional creation of a vibrant school community, the HOS inspires staff and students to engage in rigorous and purposeful learning in every classroom, every day. The HOS develops enduring and joyful relationships with students, teachers, parents, and community members, and s/he builds and maintains a strong presence in the local community. This person embodies a deep belief in and powerful ability to lead Equip Academy's innovative approaches and unique school features: inquiry-based, educator excellence, college-preparatory, rigorous curriculum, and comprehensive literacy and language acquisition program. The HOS is the most senior and critical leadership role within the school, and is committed to ensuring that our students develop the knowledge, skills, and confidence to succeed so that they have the opportunity to live out their full potential.

The HOS is hired by, reports to, and works closely with the Governing Board.

Responsibilities

- **Educational Leadership:** Guides Equip Academy's educational vision to align with current academic standards, accountability goals and metrics, and the unique needs of the student body. Leads, implements and facilitates teacher development programs, including hiring, training, coaching, and inspiring of a diverse team of educators who work towards dramatically and measurably growing student learning and achievement.
- **Curriculum:** Leads all curriculum development, adoption, and implementation that represents and is proven to powerfully educate a diverse student community. Ensures curriculum in every classroom at every grade level that is thought-provoking, hands-on, engaging, student-centered and supportive of teacher success in its surrounding resources and trainings.
- **Data:** Engages in strategic planning, staff management, and student achievement evaluation to ensure that we demonstrate a record of measurable student achievement, including effective implementation of English Learner and special education strategies, programs, or curricular approaches to eliminating extreme disparities in student outcomes.

- **Budget and Finance:** Manages, monitors, and reports school finances and related activities to ensure that the school remains fiscally responsible and financially healthy in the short- and long-term. Manages complex budget systems, oversees the preparation and maintenance of all purchase orders and other expense records and approves all expenditures. Ensures that the school reconciles all site records, with monthly reports as required by the PED, and ensures that all expenditures are within budget allowances as approved by the Board for the fiscal year.
- **Culture and Communication:** Demonstrates effective communication with the PED, Board, Community, Families, Staff, Teachers, and Students, interacting with integrity and efficacy with multiple constituencies to promote our mission and grow student achievement. Brings people together, creates a sense of community, and cultivates a rich learning environment that is positive as well as physically and psychologically safe.
- **School Operation and Compliance:** Understands educational policies, ensuring compliance with all state and federal laws and regulations. Understands or has experience with maintenance, operations, payroll, food service, and transportation. Understands records and file keeping, including assessment results, test scores, discipline referrals, medical reports and records, and other student documents. Oversees all day to day operations, including but not limited to ordering and receiving

Minimum Qualifications

- Mission- and vision-aligned
- 2-3 years of teaching experience as a lead teacher
- Advanced degree in education or applicable field
- Leadership experience within a similar educational setting
- Diverse experience across grades and subjects
- Exceptionally high standards for the quality of work and a reflex to improve at every turn
- Eager to learn and constantly demonstrates a growth mindset
- Record of exceptional student achievement results on external standards-based assessments
- Agility to adapt in an ever changing environment
- Valid Driver's License and Criminal background check (required)

Compensation

The salary for this position is competitive and commensurate with experience. Equip Academy invests in employees by providing ongoing professional development, coaching, and upward career pathways in our school. We are proud to provide a generous benefits package to full time staff, which includes flexibility in our healthcare plan and 403(b). At Equip Academy, we care about our employees' mental health and offer services covered by insurance to utilize for their personal care.