

New Mexico Public Education Commission



2024 New Charter School Application Kit Part C - Written Responses

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Applicant Information

Name of Proposed Charter School: [Sun Mountain Community School \(SMCS\)](#)

School Address (if known): [26 Puesta Del Sol, Santa Fe, NM 87508](#)

School Location (City/Town): [Santa Fe](#)

School District within which the proposed school will be located: [Santa Fe Public School District](#)

Grades to be served: [K-8](#)

Requested Enrollment Cap: [208](#)

Primary Contact Person: [Jayita Sahni](#)

Address: [26 Puesta Del Sol](#)

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FOUNDING TEAM

The founding group for Sun Mountain Charter School (hereafter referred to as SMCS) includes dedicated parents and teachers who are both scholars and business professionals. Our diverse backgrounds range from education to the field of law, and our unique experiences and abilities provide the necessary tools to ensure the success of SMCS. In the area of business, we have extensive understanding of day-to-day operations. In terms of organization, governance, and administration, we understand the administrative needs of an organization and are adept at building and strengthening interpersonal relationships. In terms of curriculum, instruction, and assessment, we have founders with extensive experience in delivering Waldorf education and service in the public realm to ensure curriculum is in line with state standards and our school philosophy.

Figure 1 - Founders and contributors expertise areas

Name	Curriculum	Instructional Methodology	School Administration	Teaching	Special Education	Charter School/Business Development	Legal	School Finances	School Facilities/Real Estate	Fundraising/Grants	School Non-Profit/ Assoc. Governance	Human Resources
Jayita Sahni									X			
Zoe Wilcox	X	X		X							X	

Brianna Bressler							x				x	
Daniel Wendland	x	x	x	x	x					x	x	
Jessica Wireman			x				x		x			
Kathleen Taylor	x	x	x	x							x	
Elliot Ryan	x	x	x	x	x						x	
Arina Pittman	x	x		x	x						x	
Matthew Burritt	x	x	x								x	x
Peter Goss			x	x			x		x		x	x
Taylor Romens	x	x	x	x								
Pam Colgate	x	x	x	x			x		x		x	

I. Academic Framework

Introduction

Sun Mountain Community School (SMCS) is seeking approval for a charter petition for a new establishment, benefiting the community, with a charter term of July 1, 2025 to June 30, 2030, authorized to serve grades K-8 initially. Later plans, at the time of our renewal, call for an expansion application for grades 9-12. The goal is to establish a robust public Waldorf charter school (K-12) for the families of Santa Fe and its surrounding communities.

Sun Mountain Community School seeks to build on the success of the Santa Fe Waldorf School, which has been an esteemed element of our Santa Fe community for forty years. It was opened in 1983 as a Kindergarten to 3rd grade school, expanding to all grades (K-12) by 2004. By August 2023, when SFWS closed its doors, it had graduated 38 classes of 8th graders and 24 classes of 12th graders as of the spring of 2023, providing it with an extensive alumni population. SMCS’s proposed site occupies an 8-acre campus designed to hold 208 students, with a kindergarten building and dedicated playground, several buildings for elementary school classes, and an entire building for specialty classes (a music room, tutoring rooms, a performance space, a handwork room and a woodworking room). On the grounds, there are long established gardens, playground spaces, a sand volleyball court, and two basketball courts.

In our community survey, a majority of respondents expressed an interest in a K-12 Public Waldorf School in Santa Fe. The SMCS Founding Team has decided to accomplish this in two phases. In the first phase, which is defined in this charter application, we plan for a K-8 school with an enrollment cap of 208. In 2024-25, SMCS will adapt the site of the former Santa Fe Waldorf School to begin serving grades K-4 in August 2025. The next year expanding to K-6, and then, in 2027-2028, filling out to K-8 and continuing in this configuration (K-8) through to the 2029-2030 school year. In the second phase, SMCS is planning for the five year charter renewal process to also include an expansion application for grades 9-12, marking the full grade level build-out, serving students in grades K-12 in the 2030-2031 school year and into the future.

Sun Mountain Community School will continue to serve the community needs of families seeking a Waldorf educational option in a manner that is more affordable and more accessible to a broader range of students and families than the independent school afforded. At the time of Santa Fe Waldorf School's closure in the summer of 2023, the demand for Waldorf education far exceeded the financial resources available to the families enrolled. Before closing, approximately 50% of SFWS students were receiving significant financial aid in the form of tuition discounts, which ranged from 25%-75% for non-employees, and 100% tuition remission for staff and faculty children who attended the school.

The creation of a public Waldorf charter school would help all local families access this profound educational option. This claim is supported by the results from a community wide survey distributed by the SMCS Charter Committee in which 94% of the 113 respondents would send their child to a Waldorf-inspired charter school. (When respondents were asked if they would send their children to a private Waldorf school, 27% said "no", followed by the query "Why? Or "Why not?"; answers show that over 20% of Santa Fe families could not afford the private school tuition.) When asked what grades should the school serve, some families wanted a K-6 option and others a 7-12 option, while the majority (56%) desired the full K-12 Waldorf experience.

Public Waldorf charter schools are established and growing in numbers in the United States. Waldorf education is one of the fastest growing educational movements globally. The first Waldorf-inspired charter school, called the Milwaukee Urban Waldorf School, opened in Milwaukee, WI in 1991. Its success led to a wave of other Waldorf-inspired charter schools. The Alliance for Public Waldorf Education currently contains 60 member schools in 16 states. The Association of (private and independent) Waldorf Schools of North America (AWSNA) consist of 169 schools in the United States, Canada, and Mexico. Worldwide, there are currently over 2,000 Waldorf schools in 113 nations, some of which are government-supported and others which are private and independent. While this movement grows and becomes ever more appropriate to the needs facing our students, there is not a single Waldorf-inspired schooling option with a full curriculum in the State of New Mexico at present.

Public Waldorf-inspired education is also well researched. The above-mentioned school, the Milwaukee Urban Waldorf School, was the subject of several formal studies comparing the pioneering school's academic and social and emotional benefits to the neighboring standard public schools. The most thorough of these was *Twenty Years and Counting: A Look at Waldorf in the Public Sector* by Larrison, A., Daly, A, and VanVooren, C. (Larrison et al, 2012) As the public Waldorf school movement grew, it became the focus of a large Stanford University study by Friedlaender, D., Beckham, K., Zheng, X., & Darling-Hammond, L. of Sacramento's Alice Birney Public Waldorf school called *Growing a Waldorf-Inspired Approach in a Public School District* (Friedlaender et al, 2015). A third study investigated T.E. Mathews Community School, a Waldorf-inspired community school in Yuba County, CA serving 13-18 year-old-at-risk students, many of whom are on probation. This document contains dozens of well researched studies and books. We mention these three specifically as their focus is so particular to the case presented in this application, that public Waldorf schools surpass neighboring public schools in graduate's academic test results and in measures of social and emotional learning and in a students happiness at school, and their data is used throughout this document. They will henceforth be referred to as *Twenty Years and Counting*, SCOPE (Stanford Center for Opportunity Policy in Education), and T.E. Mathews.

Sun Mountain Community School is prepared to pull from a wealth of Waldorf-trained teachers in Santa Fe county. Many of the potential teachers come from the former Santa Fe Waldorf School. A process of gaining NMPED licensure, for those teachers, who do not already have it, will be initiated during our implementation year. Teachers would then be ready and prepared to serve students as early as the Fall of 2025, meeting NM Core Curriculum standards through a Waldorf developmental model.

“Our highest endeavor must be to develop free human beings who are able out of themselves to impart purpose and direction to their lives. The need for imagination, a sense of truth, and a feeling of responsibility—these three forces are the very nerve of education.”

— Rudolf Steiner

A. Mission and Vision

A. (1) Mission

State the mission of the proposed school. (NMSA 22-8B-8A)

THE SUN MOUNTAIN COMMUNITY SCHOOL MISSION STATEMENT

The Sun Mountain Community School (SMCS) is a community of families and educators dedicated to cultivating the intellectual, social, emotional, physical and consciousness capacities of the developing human being. Our mission is to educate the whole child, using an age-appropriate approach to content and skills based on principles of Waldorf Education and the work of Rudolf Steiner. Our students engage in rigorous academics, develop connections to the natural world and moral discernment, and achieve an appreciation of themselves and others.

THE WALDORF APPROACH

Sun Mountain Community School (SMCS) intends to holistically educate children at the K-8 level, applying an academic-arts-movement integrated curriculum inspired by an understanding of child development. Through this foundation, the Waldorf approach enriches student imagination, improves academic performance across a broad range of learner types and ethnic backgrounds (SCOPE 2015), and encourages empathetic responses to their environment and lifelong learners (Safit & Gerwin, 2020).

Researching Waldorf Schools: What College Professors Say about Waldorf Graduates

(Mitchell & Gerwin, 2007) *From a 2007 AWSNA survey of 550 Waldorf high school graduates nationwide—and college professors.*

- One professor noted that Waldorf students “are flexible, creative, and willing to take intellectual risks.”
- Another commented that a Waldorf student, whom she knew, “had more confidence in her imagination than did most students.”
- A third commented that a Waldorf student, whom he had taught, was “a Renaissance man able to find a balance between his intellectual gifts, his athletic interests, and his high ethical and moral standards.”
- A fourth professor noted that in Waldorf students “their leadership qualities are excellent, and ethical and moral standards stellar.”

We will build our school on the Seven Core Principles of Public Waldorf Education, the Seven Practices of the Waldorf Approach, and the Two Goal Missions of our school. They are summarized here.

Seven Core Principles of Public Waldorf Education

1. Public Waldorf education is founded on a coherent image of the developing human being.
2. An understanding of child development guides all aspects of the educational program, to the greatest extent possible within established legal mandates.
3. Public Waldorf education exists to serve both the individual and society.
4. Public Waldorf schools foster a culture of healthy relationships.
5. Public Waldorf Schools work to increase diversity and access to all sectors of society.
6. School leadership is conducted through shared responsibilities within established legal structures.
7. Public Waldorf schools cultivate a love of lifelong learning and self-knowledge.

An expanded description of the Core Principles from the Alliance for Public Waldorf Education can be found here: [CORE-PRINCIPLES pdf](#)

Seven Practices of the Waldorf Method

(see the full descriptions of these methods in Section II.A.(3))

1. Cultivating **Whole Child Education** by continually engaging the **Head, Heart, and Hands** of the student. SMCS will educate students in a thematic, arts-integrated, and interdisciplinary approach so students develop the ability to communicate effectively and, as future citizens, educators, scientists, and policymakers, to solve complex problems, globally and locally, in their future adulthood. Our holistic approach addresses the importance of a child developing not only their intellect, but also their social/emotional and physical/will capabilities. Students are introduced to associative thinking and work with socio-economic, environmental, political, psychological, scientific, environmental, health, and inherent multidisciplinary issues and to their complex and ambiguous nature. Students, therefore, become practiced at synthesizing disparate information and ideas to solve problems.
2. The understanding of and collaboration with a **Child Development Method**. When the child is developmentally ready for an intellectual concept, learning happens efficiently and, even, with joy. Section A.(3) explains in detail the common pivotal ages that change development in humans as well as how that affects our curriculum for each grade. The Waldorf study of child development begins at birth and extends through the 21st year. The Founding Team of this application holds the vision of this complete developmental process. Dedicated to excellence and school health as we grow, we are initially requesting approval to serve the children between kindergarten and eighth grade with the intention of expanding to twelfth grade when possible.
3. In order for teachers to develop close ties with their students and families and guide each child through the developmental ages, we will practice **Looping**. Looping means that a single teacher will stay with a class for the 2nd- through 5th-grade years, after 5th grade the teacher “loops” back to take up a new second-grade class and repeat the cycle. Before 2nd-grade, there will be a kindergarten teacher and a 1st-grade teacher who will remain in that year to help form the students into cohesive classes for the looping to begin. In middle school, there will be four teachers who will work as a team across the three grades; however, a single teacher will follow a class from 6th to 8th grade, as a “homeroom teacher” and will be their central point of contact for those three pivotal years.

4. Waldorf pedagogy observes that subjects are best taken up by children when they are studied in depth; therefore, our curriculum is organized in a **Thematic Approach**. To do this, our “main lesson” is a longer and foundation class of the day. Core subjects are taught in “blocks”, which are 3-4 weeks in duration, where the main lesson focuses on one subject matter. Our integrated curriculum will often incorporate main lesson themes in other subject classes.
5. We value the **Use of Rhythm** as a tool of teaching: within a class; throughout the day by repeating a subject matter in other classes; throughout the month with intermittent reviews; and through the year by incorporating a festival life involving the whole community.
6. The Waldorf classroom looks and feels unique because of the **Tools of the Classroom**. In the grade school, these include storytelling as a core instructional tool, the creation of each child’s “main lesson book”, instead of using textbooks, and instruction without the use of media, unless students are learning about media.
7. For a student’s health and their relationship with the world, we place great importance on **Outdoor Education**, a student’s time in nature, in our school and our curriculum. Our science program grows out of foundation in nature studies. Our carefully tried and true outdoor program adapted from the former SFWS (see Attachment 9 - Outdoor education program) gets students in nature and hikes and camping throughout the grades. See Section A.(3) for researched-based data on each of these practices.

The Two Mission Based Goals of SMCS

Mission Goal #1 - Educating the whole child. Because we value this holistic educational view, we will carefully assess, analyze and plan improvements of academic success of our students, in accordance with the New Mexico Statutes and Standards. In addition, we will use Panorama Education’s Social and Emotional Learning Student Survey multiple times a year to evaluate our success in creating healthy “hearts and hands”. (See the specifics of our Panorama Education testing in Section I.B.) The results of these assessments will also be reviewed, analyzed, and will inform improvements by the Governing Board along with the Equity Council.

Mission Goal #2 - Educating the whole community. In direct response to our third and fifth Core Principle, (#3 - Public Waldorf education exists to serve both the individual and society, and #5 - Public Waldorf schools work to increase diversity and access to all sectors of society), our mission goal seeks to educate the whole community. We educate parents through parent/teacher engagement events, offer community classes, and other opportunities for parent involvement in the school. We give to the community by hosting classes on educational topics of broad interest, and hosting curriculum-embedded cultural and seasonal community festivals. We also have created an outreach plan that targets all demographics of Santa Fe, particularly the Hispanic community which we assessed as our largest community demographic.

**MISSION SUCCESS:
THE PORTRAIT OF A WALDORF STUDENT**

Our Mission is to educate students so they think critically and independently while recognizing humanity’s interdependence with the local and global community. The goal of our developmental method is to create free thinkers, so students, at any age, are noticeably on that path. This is seen in an openness to working and playing with other students who look, speak, and learn differently than they do. The holistic approach to the classroom (see Section I.F.(1) “Whole Class Teaching”) provides

students the ability to feel a part of and work collaboratively. The content, in which standards are delivered, pulls from cultures all over the world and is interwoven into this thematic approach (see Section I.A.(3) “Thematic Approach”). This also adds to students' sense of being a citizen of the world, allowing them to value differences in others by responding with interest, empathy and respect.

Students thrive in this environment where teachers cultivate a personal connection with their subject matter (See Section I.F.(1) “Life-Long Learning”) and with their students (see Section I.A.(3) “Looping”). Plus, the subject matter and content are purposefully designed to align with the student’s developmental age. Because of this, students engage in the curriculum and show a passion for learning that continues throughout their life, which aligns with our core principle #7 - “Public Waldorf schools cultivate a love of lifelong learning and self-knowledge.” In the book, *Into the World*, authors show that a Waldorf graduate's most commonly chosen profession is education (Safit & Gerwin, 2020). Students’ striving is evidenced in the care of their independent projects and their striking main lesson books (see Section I.A.(3) “Main Lesson Book”). Throughout their educational journey, a Waldorf student engages with the people, places, and learning opportunities around them, which, in turn, fosters their own intellectual, physical, and emotional growth.

Finally, the Waldorf student sees challenges as a natural part of life and an opportunity for growth. The continual emphasis on observation and hands-on experience teaches students to respond to challenges in real time, through their own will and thinking. The integrated curriculum allows students to observe and personally experience that each student has areas in which they excel as well as those areas in which they must work harder. For example, one student may consistently excel in painting class, while another is perceived as a leader in singing, while yet another holds the rhythm when others falter in recitation of the multiplication tables.

Research shows that Waldorf students are 1) well prepared for post-secondary education, 2) have low rates of absenteeism, and 3) are generally well-adjusted (and therefore happier) students:

More Prepared for Post-Secondary Education and Life-long Learning

The former Waldorf students report to the researchers that the Waldorf schools prepared them well for higher education. In particular, Waldorf methods were credited with helping them develop a positive attitude to learning and studying (Dahlin, 2004, p. 3). The Waldorf teaching methods are felt to have contributed to a student’s self-confidence and ability to acquire, digest, and critically examine information and knowledge. In particular, the regular independent tasks (such as main lesson books) seem to give them experience and self-confidence that are assets when it comes to autonomous thinking and written work in education (Reece, 2007).

Lower Truancy/Absenteeism

The New Mexico Public Education Department website states that, “Across the country, more than 8 million students are missing so many days of school that they are academically at risk. Chronic absence — missing 10 percent or more of school days due to absence for any reason—excused, unexcused absences and suspensions, can translate into third-graders unable to master reading, sixth-graders failing subjects and ninth-graders dropping out of high school.” (Bauer et al. 2018). The New Mexico legislative education committee report of Nov. 16th, 2023 found the rate of New Mexico chronic absenteeism as 39.2%. (PDF - www.nmlegis.gov). A student’s steady enrollment allows them to benefit from the goals of the school. High school stability rates, both within a school year and across the years in school, equate to higher graduation rates and academic success.

Studies and experience shows that Waldorf students love being at school. The SCOPE study measured the stability rates of Sacramento’s Alice Birney Public Waldorf students. The promising numbers cited

below are attributed to several of Waldorf's "Unique Approaches" particularly the developmental method, looping and the arts and outdoor integration.

The T.E. Mathews, the school for 13-18 year old at-risk students, many of whom are on probation, using a public Waldorf curriculum, is a testament to how much Waldorf students like school and attend. "One of the most interesting discoveries in examining the records at T.E. Mathews, and one of the first and most apparent indicators that something is different in this school, is the relatively high attendance records. In contrast to their pattern at other schools, they show up to T.E. Mathews. Not only do they attend, many students go through Herculean efforts to come to school at T.E. Mathews." The school attendance record was 91%-92% (T.E. Mathews, 2007).

"For Alice Birney, over 90% of the students for all grade levels (K-7) reported to the district that they expected to return, with a range of 90%-97% within each grade level. In contrast, for other schools at SCUSD, the percentages of students who reported expecting to return to the same school were from 76%-86% for grades K-7. These results indicated a stable learning environment of Alice Birney Waldorf School where a majority of students can develop strong relationships with their classmates and teachers and have a consistent instructional environment. It is unclear the extent that income differences may play into the differences in stability rates and transiency from one year to the next in these district comparisons. SCUSD in 2014-15 served about 68% low-income students compared to Birney's 41%." (SCOPE 2015 pg 72).

Happier Students

Although significant efforts are being made to address the issue of mental health in children in New Mexico, the Annie E. Casey Foundation's annual KIDS COUNT Data Book shows a great challenge to face. The 2022 State Trends in child mental health, published August 8th, 2022, showed that in state ratings, New Mexico had dropped down to the 50th ranking in the United States. (THE ANNIE E. CASEY FOUNDATION et al., 2023)

Although we are always learning and growing to meet the children before us, Waldorf curriculum is an inherently "trauma informed" curriculum that "holds" all children. The quarterly Waldorf pedagogy publication, Lilipoh, in July 2019, published an article by Ida Oberman, who expanded the use of the term "Emergency Pedagogy" in her article "Waldorf Emergency and Trauma Pedagogy Comes to the US: How Trauma-Informed Care Works for Children Living in Poverty." She saw Waldorf schools as natural places to help stabilize distressed students. The holistic stabilization of a traumatized child involves four levels that together lend a critical foundation to any therapeutic interventions that might be required later. (Oberman, 2019)

1. Physical stabilization - make the affected child feel safe. Intentional spaces are created that have a clear spatial structure, they offer activity and rest areas, eating space and a space for communal activity.
2. Somatic stabilizations - allowing the child to experience their whole body again. This is supported by the temporal structure of rhythm. Structured days with clear rhythms and rituals convey safety and orientation. There needs to be a time for playing, a time for artistic activity, a time for projects and exercises, and a time for rest.
3. Psycho-social stabilization - restoring reliable relationships of trust. Here, relational structure is key. This can happen through role models of adults who provide healing experiences.
4. Mental-biographical stabilization - negative experiences are replaced by positive ones. Here, offering the child experiences where they can of their own ability set a goal and carry it out. Here arts and crafts and ecological projects can unblock the traumatized child's potential and allow them to become more actively involved again.

Research suggests that students attending Waldorf schools show more mature social and moral responses (Armon, 1997; Dahlin, 2010; Rivers & Soutter, 1996) as well as have better social skills (Payne, Rivers-Bento, & Skillings, 2002) and a reduction in bullying of peers (Rivers & Soutter, 1996). Further, studies indicate that Waldorf students value lasting relationships and helping others (Mitchell & Gerwin, 2007) and have a tendency to have more long term friendships (Oberman, 2007).

In a qualitative study, Dana Praeger investigated the Milwaukee Urban Waldorf School for her dissertation, which was completed ten years after the beginning of the public school. Praeger discovered that students were intrinsically motivated and developed self-confidence about their academics (Prager 2001, p. 220).

Excerpts from Into the World: How Waldorf Graduates Fare After High School. (Safit, 2020) The Research Institute for Waldorf Education (RIWE) formally contacted all 39 North American Waldorf high schools in October of 2017, inviting them to take part in a survey of Waldorf alumni who had graduated between 1990 and 2017. There were 1,066 respondents. Here is some of the data collected:

- After school, attends college/university (98%)
- Feels prepared for college/university (95%)
- Completes initial college degree (92%)
- Gets into top three choices for college/university (90%)
- Would recommend Waldorf education (87%)
- Describe themselves as being self-reliant and valuing self-confidence (94%)
- Highly valued tolerance and viewpoints other than their own (90%)
- Cared most about ethical principles in the workplace and greatly valued helping others (89%)
- Strongly feel Waldorf education prepared them to:
 - Be creative and innovative (96%)
 - Be open-minded (95%)
 - Empathize with other (92%)
 - Think in whole pictures (88%)
 - Take leadership roles (86%)
- 41% have a career helping others: (education (23%), medicine (13%), or social work (5%)) compared with the 32% NAIS and 23% general U.S. population.

Finally, in Bo Dahlin's study of Swedish Waldorf Schools, he found that 7% of Waldorf parents were former Waldorf students, but 70% of former Waldorf students sent their children to Waldorf schools. (2004).

MEET THE NEEDS OF OUR COMMUNITY

Historic Increased Need for Tuition Assistance

At the end of its 40-year history, in August 2023, the Santa Fe Waldorf School found few families could afford the cost of private school education. Despite a steady increase in enrollment since COVID, by spring of 2022, 90% of families were requesting financial assistance for the upcoming school year. Over 50% of the student population received it. Of that 50%, 32 students had full tuition remission because one of their parents was full-time faculty or staff member. In addition, eight high school students received full scholarships designed to keep dedicated students in the classroom because of the higher cost of high school education and because of parents unable to meet the tuition. As with other private

Waldorf school efforts elsewhere in New Mexico (Taos, Albuquerque) over the years, eventually, the economic reality of our state could not support this methodology in the private realm.

Summary of Survey Results (Reference Section IV for more details)

Our outreach campaign has given surveys out to many families inside and outside our previous school community (see complete outreach plan and audiences reached in Section IV). We surveyed families at our town halls, through facebook and emails, and through community partner's email updates, such as Wise Fool. We set up outreach booths at the Southside Library, the Genoveva Chavez Community Center, and at the Santa Fe Farmers Market too.

Of the 115 respondents, 94% support a public Waldorf-inspired charter school. This shows a keen interest in having a Waldorf education option in Santa Fe.

Findings from the survey shows that our community is familiar with and wants Waldorf education here in Santa Fe:

- 93% were knowledgeable or very knowledgeable about Waldorf education
- 74% would send their children to a *private* Waldorf school
- While 94% would send their student to a Waldorf-inspired *charter* school

There is a wide gap between the desire for Waldorf schooling and the ability to afford a private Waldorf education. Some of the responses to the question, "How much tuition would you be willing to pay for a private Waldorf school education (per year)?", range from "\$500" to "\$1,000," to "\$3,000" to "I would not be able to pay an annual tuition" and "Not an option for us (financially)" and "I would hope to be employed by the school and pay nothing."

The next set of questions asked about what things they would like to have in their child's education that they didn't currently have. When asked if their child was "emotionally held at their school", 46% said yes, 31% said no, and 22% said they didn't have school aged children. When responding to whether or not their child had enough time outdoors at their school, 48% replied no, 30% replied yes, and 22% said that they didn't have school age children. This shows that about a third of our Santa Fe survey recipients would benefit from an arts-integrated, festival rich, and outdoor incorporated education that we offer. It also shows that even respondents who did not have school-age children saw the value of having a Waldorf school in the community.

Figure 2 - (Pie Chart) Are you familiar with Waldorf Education?

Figure 2 - Are you familiar with Waldorf education?

115 Responses

● Very knowledgeable ● Knowledgeable ● Some Knowledge ● Unfamiliar

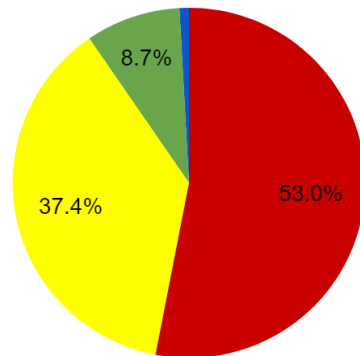


Figure 3 - (Pie Chart) Would you send your child to a private Waldorf school?

Figure 3 - Would you send your child to a private Waldorf school?

115 Responses

● Yes ● No

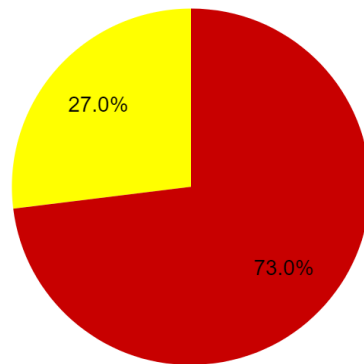


Figure 4 - (Pie Chart) Would you send your child to a tuition-free public Charter Waldorf school?

Figure 4 - Would you send your child to a tuition-free public Waldorf charter school?

115 Responses

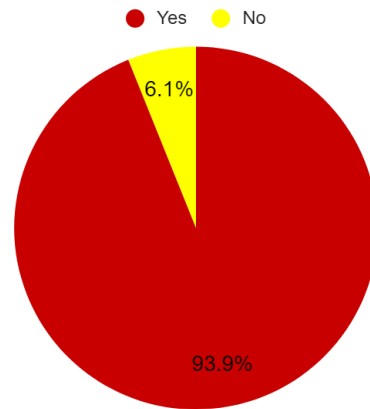


Figure 5 - (Pie Chart) Does your child feel emotionally held at their school?

Figure 5 - Does your child feel emotionally held at their school?

115 Responses

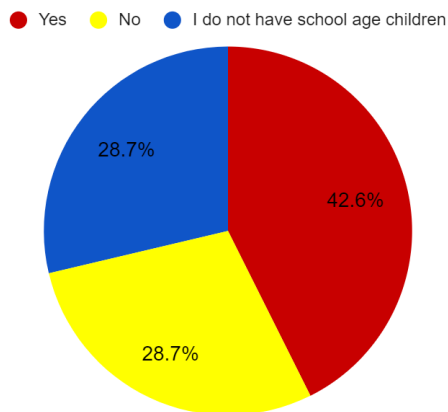


Figure 6 - (Pie Chart) Does your child have enough outdoor time at their school?

Figure 6 - Does your child have enough outdoor time at their school?

115 Responses

Yes No I do not have school age children

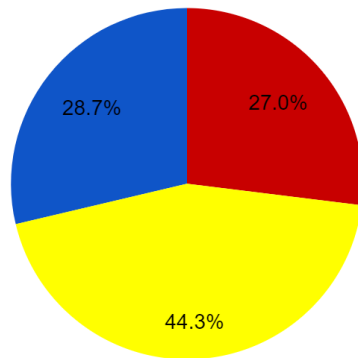


Figure 7 - (Pie Chart) What grades should the charter school serve?

Figure 7 - What grades should the charter school serve?

115 Responses

K-6 K-8 K-12 7-12

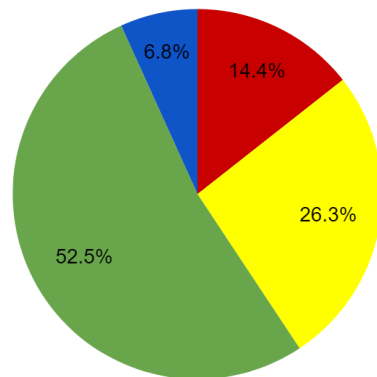
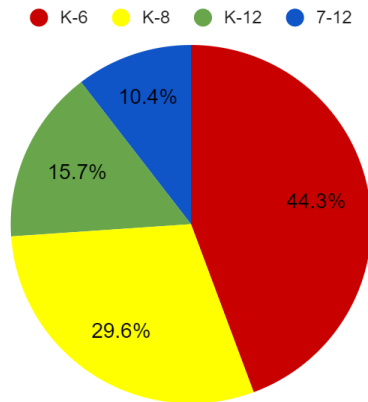


Figure 8 - (Pie Chart) What grade or grades do you think are most important for a new charter school to serve in a first term (first five years)?

Figure 8 - What grade or grades do you think are most important for a new charter school to serve in its first term (first 5 years)?

115 Responses



When asked what was missing from their child's education if they were unsatisfied (at the school they are currently attending – i.e. a non-Waldorf school), responses included (verbatim):

- Time in nature, work done by hand rather than by computer, ART, the deep reflection and focus on the whole child at the level that Waldorf education offers this
- Ok most kids though are missing connection, play, simplicity, and practical tangible hands on and hands in the dirt skills. Fun! An integrated arts curriculum.
- Life skills
- Wilderness experience
- A social environment, community events, specialty subjects and projects
- Hands-on learning
- My daughter is missing time outside and time to create. She is missing learning through movement and expressing herself through painting and modeling.
- Everything that allows a child to develop at the right pace and in the right way.
- Warmth, co-regulation, creativity, happy kids
- Arts, Nature & Cooking experiences. A sense of beauty and extended community
- More play and music and learning Spanish
- More relational work, interpersonal relations, outdoors
- Comprehensive Holistic Education meeting developmental needs
- Individual attention and outdoor experiences with nature
- We believe in Waldorf methodology and believe our children on the Autism Spectrum would benefit for more community centered and environmentally geared education
- Music
- More play time with peers.
- Educational rigor and enriching activities
- Extra curricular activities. Sports, music, languages, computer/tech, physical education, home ed. It's very much lacking
- Outdoor education and enrichment, foreign language, crafts
- Safe, nurturing, trusting, atmosphere.
- Rhythm, outdoor time, art, rigor especially in math
- Longer lunches, more outdoor time, meaningful project based learning
- Imagination, outdoor play, sufficient time for meals, active play,
- More creative freedom and connection to nature

While we, of course, can't meet all of these wishes, the Waldorf principles and practices answer a lot of them.

In addition to conducting research, the school ran a number of events on campus during the 2023-2024 school year (when the former Santa Fe Waldorf School was otherwise closed), from some of the traditional seasonal festivals to classes which teachers offered of their own initiative.

Figure 9 - List of events held on campus

List of Events in the Past Year	How many attended
Parent and Toddler Class	21 families
1st grade homeschool enrichment class	2 semester-long students; other visitors
Town Hall Meeting#1 , March 18th, 2024	45 attendees from the community
Town Hall Meeting #2, April 15th	20 attendees from the community
Town Hall Meeting #3, May 8th	29 attendees for the community
Pentathlon	7 students
Winter Spiral Festival	Approximately 110
May Faire celebration	Approximately 150 community members
Winter Painting Class (daily, Dec. 21st-Jan1 st)	7 adults
Steiner Study Group (weekly Jan-May)	6 adults
Community Council (weekly meetings)	6 parents

Integrating the Former Santa Fe Waldorf School Community

Sun Mountain Community School's founding team and supporters have deep connections with the Santa Fe Waldorf School (SFWS). While the SFWS and Sun Mountain share the Core Principles of Waldorf Education and many curricular traditions, the proposed charter school is a wholly unique and fresh entity. As a new entity SMCS will be governed and operated independently, SMCS plans to have a relationship with a to-be-formed supporting foundation, and the intent is for SFWS to fill that role. SFWS is no longer operating, but it continues to own the campus SMCS plans to occupy. After application approval, SMCS intends to secure a lease between SMCS and SFWS for use of the campus and to formally propose to SFWS's board that SFWS become a supporting organization for SMCS. Until SMCS secures a charter contract, these decisions cannot be made by SFWS's board, but the Founding Team is confident that Sun Mountain will have the support of the SFWS and be able to bring the Waldorf movement in Santa Fe into a new, modernized community center if the charter is approved.

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A. (2) Vision Statement

State the vision, or the driving force, that guides this school proposal.

VISION

Our Founding SMCS Team is building on the well-established Waldorf track record in the world, in our nation, and in Santa Fe by offering a public education to build student capacities in alignment with Waldorf core principles. To accomplish this, we must understand our history, our community and our path forward.

OUR TEAM'S REASONING AND PURPOSE

Introduction

The Founding SMCS Team is attempting to establish in Santa Fe what already exists elsewhere around the world and throughout the US. The Waldorf movement, initiated in 1919 in Germany by philosopher Rudolf Steiner, has grown and expanded steadily over the past 100 years. There are currently around 1,200 Waldorf schools in 113 nations (Franz, 2022). Waldorf kindergartens number 1,928. According to the Alliance for Public Waldorf Education, there are 76 charter schools in 16 states maintaining membership with the Alliance for Public Waldorf Education.

Why not a Waldorf charter school in New Mexico? The roots are already here: we have 40 years experience to show that Waldorf has a living place in this community. As a public school, however, we can broaden the population this education serves. We are applying to provide this education for Santa Fe County and its diverse cross-section of citizens, as all New Mexicans deserve the uniqueness and innovation of this methodology.

Building on Historical Success

The Milwaukee Urban Waldorf School, the first Waldorf-inspired public school, began in 1991 in a low-income neighborhood. The change in education methodology made an immediate impact on the students: (McDermott et al., 1996, p. 121)

“...[t]he researchers documented that Urban Waldorf students showed substantial improvement in standardized test scores. In 1992, 26 percent of the third-grade students read over grade level. In 1995, 63 percent of the third-grade students read over grade level.”

“The number of suspended students dropped from 3 percent in 1991 to 0 percent in 1993. Attendance also stabilized at about 91 percent to 92 percent.”

“Also, for a school with 350 students [the majority being African-American] in 1992-1993, 374 parents attended at least one parent-teacher conference (McDermott et al., 1996, p. 135). These numbers seem remarkable and the apparent success of this school inspired other schools to adapt Waldorf methods.”

The Milwaukee Urban Waldorf School's early quantifiable success inspired a movement across the United States. There are now 60 public Waldorf schools in the U.S. who are members of the Alliance and their success keeps the movement growing.

Sun Mountain Community School is attempting something significantly different from what the current Santa Fe public school sector offers, but it is in line with other Waldorf charter schools around the country. The 32-year-old Waldorf-inspired public charter movement has adapted a 100-year-old, well-established, well-tested methodology, and, as the data shows, has succeeded time and time again. The Alliance offers membership to those schools who have been approved for charter status. Members receive referrals to experienced Alliance teachers and administrators for guidance through

the implementation year and beyond. They host bi-monthly leadership meetings for members as well as yearly conferences, collaborating to help public schools meet common core standards through the richness of the Waldorf method.

COMMUNITY OUTREACH PLAN FOR FUTURE SUCCESS

Why Provide a Public Education Platform for Your Proposed Community?

In adherence with our fifth core principle, “public Waldorf schools work to increase diversity and access to all sectors of society”, the Founding SMCS Team is dedicated and mobilized to expand Waldorf education for all citizens in Santa Fe. We have seen our model work in the private sector. The following attachment shows how Waldorf high school graduates (from the former Santa Fe Waldorf School) have succeeded in the past with over 90% enrolling in college.

See Attachment 1 - SFWS Graduates and their College Placement Data

The Founding SMCS Team sees the awarding of a public charter as a way to broaden the recipients of this educational gift equitably across Santa Fe families, regardless of social-economic status. Furthermore, we clearly understand the equity gap brought to light in the Yazzie-Martinez Lawsuit. At-risk students, Native American students, students with disabilities, students for whom English is a second language, economically disadvantaged students, and students who are highly active, need adequately funded programs. We believe that with a robust Special Education and ELL program, cultural and linguistic sensitivity training by administration and faculty, and targeted outreach to pull these populations into our application process, the Waldorf pedagogy will offer a true educational alternative and particular innovations that can serve these populations and close their performance gaps. Our proposed Equity Council will ensure that our demographics continually increase the number of students we serve from these student subgroups and monitor their academic, emotional and health closely while part of our community.

Summary of Community Outreach Plan

In all of the actions taken in our outreach plan for SMCC, we have aimed and will continue to aim in our implementation year, to nurture existing relationships with those from the former Santa Fe Waldorf School. We will also cultivate enduring new relationships and partners (particularly with other public institutions). In the implementation year, we will target low income neighborhoods, traditionally Hispanic neighborhoods (to meet the goal expressed in our mission to match our school’s demographics to that of our community), as well as Spanish-only speaking populations.

Through the charter school application process: As is explained in detail in Section IV.A.(1), our outreach plan began in December 2023 with our “Listening Campaign.” The Founding Team has participated in numerous educational classes, community events, and campaign efforts. Here are efforts made to connect and communicate with our community through the application process:

- Listening Campaign (42 participants)
- Regular communications of charter efforts and events to our Santa Fe Waldorf School email list of over 900 community members.
- One-on-one emails and meetings with community members and organizations, businesses, area schools and education specialists, and alumni.
- Hosted three town halls
- Conducted two school input surveys
- Hosted three seasonal festivals

- Hosted pedagogical study groups weekly
- Share membership with the Waldorf “Community Council,” which includes former Waldorf parents
- Hosted classes for students on campus including woodworking classes and Pentathlon training.
- Created a web-based presence
- Hosted three outreach booths in town

During our implementation year: We will continue to collaborate in hosting seasonal festivals on campus, as well as studies, outreach booths, town halls and media presence to share information about SMCS and to answer questions and collect general feedback about relevant topics such as our school model, facilities, lottery and enrollments, etc. We will also continue to reach out, one-on-one, to listen to families of potential students and other community stakeholders. We will keep the community informed about our progress, volunteer opportunities, and offering in a bi-monthly e-blast.

In addition to partnering with the Alliance for Public Waldorf Education, SMCS commits to partner with local schools and educational organizations like Public Charter Schools of New Mexico.

Once operational: Once operational, our team will collect family and community input through surveys and invitations to ask questions through an easy-to-find, thoughtfully formatted document on our website to ask questions and pose concerns. We will host educational lectures on Waldorf pedagogy and book studies, as well as school picnics and garden work days. We will implement our outreach to families immediately (see Section I. A. Developing relationships - Building Community) such as weekly emails to the parents and quarterly parent meetings. These efforts, in addition to school texts, will allow parent relationships to build, so parent, teacher, and school can support the child’s academic, social, and artistic growth.

Specific Efforts to Reach Hispanic, Native, and ELL Populations

To meet the goal expressed in our mission, i.e. to close the demographic discrepancy gap of Hispanics and ELL learners between the former Santa Fe Waldorf private school population and the proposed charter school, we will make specific efforts in this outreach.

Through the application process:

- We have made both our community survey and the chance to vote for the name of our school in both English and Spanish. We had a double-sided, single sheet of paper explanation of “What is Waldorf Education?” also translated into Spanish and was available at our booths.
- We have organized outreach booths in areas where we have a greater chance of meeting these populations:
 - The Southside Library during the Bilingual Books and Babies event.
 - The Genoveva Chavez Community Center.

During our implementation year:

- We will continue to host bilingual outreach booths throughout town and community events. These efforts will be especially important in the two months application period.
- We have two native Spanish speaking community members dedicated to starting a pedagogy book study in Spanish. We will open this opportunity to all community members.
- We will develop our website so that all is available in English and Spanish, particularly the registration packet and the lottery information.
- We have reached out to three preschools on Airport road and met with two of their directors with two Spanish speaking members of the team.

- The School Board will hear from the Equity Council on how well we are meeting our diversity outreach goals and will problem solve together with the head of school to improve and make more efficient our efforts.
- We will strive to hire bilingual faculty and staff.

Once operational:

- We will implement our ELL program.
- The Equity Council will regularly review our outreach goals versus our reality, and report their findings to the School Board.
- We will engage in professional development that expands employees' cultural and linguistic responsiveness.

SERVING THE COMMUNITY IN UNIQUE & INNOVATIVE WAYS

The Santa Fe public school community has been called upon for change in its approach and improvement in its success. The Yazzie-Martinez Consolidated Lawsuit demands we close the gap of school success between our privileged and our most at-risk students. Our test scores nationally show a need to innovate in the approach to learning. A Waldorf-inspired integrated-arts-outdoor curriculum provides students, of all different intelligences, a supportive foundation to grow their confidence so that they may thrive throughout the program's content. Waldorf-inspired schools offer something truly different than standard public education.

CONCLUSION

The value-added effects on a student's academic performance stem from the unique and innovative approaches mentioned in the next section. Preparing a curriculum that addresses the whole child and respects their natural development has wide ranging benefits. Profound relationships cultivated over years with the same teacher and immersion into the selected subject matter, and the predictability and security of rhythm all allow a student to dive deep into their own education. We will also see how various Waldorf values help fortify the child's emotional health: art as part of the academic processes; the integration of the outdoors, movement, and nature to help regulate our bodies and calm our thoughts; and the pedagogy's firm guardianship against media in the grade school classrooms (unless the student is learning about media or unless an eighth grader is doing research for a culminating project). Emotionally healthy children are able to contribute more to intellectual development and success.

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A. (3) Uniqueness and Innovation

treating the **uniqueness, innovation**, and significant contribution that the educational program will bring to public education. (NMSA 22-8B-3)

The Sun Mountain Community School (SMCS) is a community of families and educators dedicated to cultivating the intellectual, social, emotional, physical and consciousness capacities of the developing human being. Our mission is to educate the whole child, using an age-appropriate approach to content and skills based on principles of Waldorf Education and the work of Rudolf Steiner. Our students engage in rigorous academics, develop connections to the natural world and moral discernment, and achieve an appreciation of themselves and others.

UNIQUENESSES

1. **Whole Child Education - Head, Heart, Hands**
 - a. Interdisciplinary approach to subject matter
 - b. Arts integration
2. **Developmental Model**
 - a. The Seven Year Phases
 - b. Approach to Kindergarten
3. **Looping**
4. **Thematic Approach - Teaching in depth**
 - a. Main Lessons
 - b. Teaching in blocks
5. **The Use of Rhythm**
 - a. In-breath, Out-breath: play as a continuation of learning
 - b. Spiraling curriculum
 - c. The cultural and seasonal festival life
6. **Tools of the Classroom**
 - a. Storytelling as instructional methodology
 - b. Main Lesson books
 - c. Low media use
7. **Outdoor Education and Movement**

Uniqueness #1: Whole Child Education - Head, Heart, Hands

Waldorf education intends for its students to become cultural creators and seeks to develop within them the capacities of clear perception, critical thinking, imagination, creativity, empathy, compassion, determination and the confidence to take action. Public Waldorf students do, on average, score higher than their public school peers on achievement tests (Twenty Years and Counting, 2012). However, this is not through narrowing the focus of the approach to push harder, longer, and earlier the subjects that are tested. Instead, Waldorf approach broadens the lens of subjects, integrating Howard Gardner's eight intelligences (Gardner, 2008), and presents them in alignment with the child's natural developmental stages. This preserves in the child the intrinsic love of learning, and because of this, they score higher on academic achievement tests as they mature through the curriculum. In the research text "Into the World: How Waldorf Graduates Fare After High School," Drs. Safit and Gerwin found that the "single most popular profession among Waldorf alumni is education," (Safit & Gerwin, 2020 p191.) showing that the Whole Child Education approach nurtures and cultivates a love for life long learning.

Furthermore, this net cast by the Whole-Child Education approach and its interdisciplinary subject matter, we will see throughout this document, catches students from the full cultural, economic, and

neurologically diverse cross section of the community because the curriculum forms to the individual student, not the other way around.

Head, Heart, and Hands

At Sun Mountain Community School, students will engage in activities that build capacities in whole child learning including cognition, social/emotional development, and practical work with their hands. Innovative and ethical ideas come from an individual's ability to move between a new idea, assess that idea through their emotional judgment, implement it into the world through their will, and then repeat the process by assessing that implementation. A large body of evidence from the last 20 years of neuroscientific inquiry supports these methods, including David Kolb's widely influential experimental method of education (Experiential Learning Theory), which mirrors head, heart, and hand learning (Kolb, 1984). Students continually move through the steps of active experimentation (doing), concrete learning (feeling), reflective observation (watching), and abstract conceptualization (thinking).

Experiential learning - Teaching the Head, Heart, and Hands.

There are two goals in the experiential learning process. One is to learn the specifics of a particular subject, and the other is to learn about one's own learning process."

David A. Kolb

In 1984, Kolb first published his Experiential Learning Theory, where a student moves through the steps of:

- Concrete Experience (CE): feeling
- Reflective Observation (RO): watching
- Abstract Conceptualization (AC): thinking
- Active Experimentation (AE): doing

The studies that followed his theory showed that the practice of teaching to the head, heart, and hands has quantifiable merit. (Beard 2006) Moving through a new academic concepts in this manner allows for:

- Creates real-world relevance
- Provides opportunity for creativity
- Provides opportunity for reflection
- Teaches the value of mistakes
- Accelerates learning
- Guides students toward the future
- Prepares students for adult life

The approach addresses the **"head"** or **"thinking"** in academic work, like language arts, geography, history, math, and the sciences. The rigor of the upper grades in Waldorf curriculum is achievable by the slow and steady and age-appropriate development of intellectual capacities in the lower grades.

We see the importance of addressing the **"heart"** or **"feeling"** life of a child with the current alarming mental health crisis among young adults (referenced in II.A.(1) "Happier Students"). The Waldorf method promotes emotional health in a child's feeling-life in a number of ways. First, the atmosphere is one of warmth. Teachers, as laid out in the section "Instruction", greet every child at the start of the day with a handshake and a smile and welcome them into the classroom, rich in quality materials, artwork of the teacher and the masters, and aesthetics. By its developmental approach, Waldorf is respectful: children are assigned tasks at which they can succeed, thereby fostering self-confidence and intellectual

interest. Throughout the grades, the study of cultural lore highlights examples of morality and transcendence. The arts-integrated curriculum develops the emotional capacities of students and allows new intellectual concepts to be processed, and thereby better remembered, through the child's heart (feeling life). World language, taught beginning in 1st grade, arise out of the human need to connect and communicate. A direct social-emotional curriculum is introduced to promote cooperation, respect and conflict resolution among students (Credo School of Arts, Letters & Sciences, 2010).

EMOTIONS AND MEMORY

“At a neural systems level, the memory enhancement seems to occur because, once active, regions within the affect processing system (e.g., the amygdala and the orbitofrontal cortex) modulate the processing of regions that facilitate the encoding of sensory detail (e.g., regions of the fusiform gyrus) and the consolidation of memory [e.g., the hippocampal formation]”. “There also is increased strength of connectivity between the amygdala and the hippocampus during the retrieval of emotional information, modulated by activity within the orbitofrontal cortex” (Smith et al., 2006). “These modulations may lead to an enhanced ability to retrieve the details associated with an episode” (Kensinger, 2009).

Kensinger proves a technique used in Waldorf classrooms for a 100 years: if information is given through emotionally stimulating stories and then students are allowed to process that information through emotionally supportive art, they will remember the material better than if their emotional bodies were ignored.

The “**hands**” or “**will**” of the child comes through physical activities that reinforce the thought material, such as the acting out a story learned, the clay construction in a study of anatomy, or the physical adding, subtracting, multiplying or dividing with a large collection of acorns. Will exercises develop strength and coordination through classes such as handwork, woodwork, and movement.

Furthermore, will development is the foundation for self-motivation, self-control, physical strength and the commitment to persevere and take action in one’s life and in the world. In this way, students learn to take an idea and put it into action, to feel empowered. “Waldorf alumni recognize that their education has guided them in cultivation of a meaningful outlook and that it is designed to be a ‘preparation for life’ (an expression used by many of the respondents in the survey) rather than solely an academic preparation.” (Taken from the survey of 1,066 Waldorf alumni respondents, compiled by Safit & Gerwin, 2020. p194.)

Summary of Whole Child Education. The education model alternates between hands-on learning and physical activity with periods of concentrated focus. (Doolittle, 1997). Data suggests a Waldorf-inspired education with a holistic approach to student development offers a promising alternative to meeting the needs of a diverse student population. These hands-on methods allow students with a wide range of learning styles to achieve success towards their academic goals. This not only makes the school experience more equitable for all populations including historically underserved groups, but also prepares a student to be a well rounded human as they enter into adulthood. Furthermore, it seeks to give students whole-life preparation. In addition to providing students with specific knowledge and skill to prepare them for college and career, Waldorf education seeks to prepare children for meaningful

lives in the broadest sense. It seeks to prepare students for physically, socially, artistically, and cognitively meaningful engagement with the world (SCOPE 2015. pg 21).

Interdisciplinary Approach to Subject Matter

Sun Mountain Community School's interdisciplinary approach to subject matter engages Howard Gardner's multiple intelligences, including gross motor (movement), visual (drawing, painting), auditory (music, storytelling), inter and intra social-emotional (cooperative groups, council), and fine motor (sculpting, handwork) (Gardner, 2008). SMCS's instructional design engages all students in their learning, from students with special needs to EL learners to gifted students. Arts-integration aligns perfectly with specially designed academic instruction in English strategies and allows English language learners to engage the approach, lower their affective filters, and express themselves on a daily basis. The integration of the arts also specifically meets the needs of students with special needs, especially attention deficit disorders (ADHD and ADD), by engaging multiple modalities, bringing a wide array of activities each day, and providing various means of showing student mastery of content.

Harvard psychologist, Howard Gardner proposed that there are 8 different types of intelligence (Gardner, 2008):

1. Visual-spatial.
2. Linguistic-verbal
3. Logical-mathematical.
4. Body-kinesthetic
5. Musical
6. Interpersonal
7. Intrapersonal
8. Naturalistic

Students benefit from this interdisciplinary approach to instruction. The wide ranging subject matter is designed to provide multiple entry points for student mastery of core content. The Waldorf approach includes such a wide range of skills, such that each student is bound to find a skill that speaks to their innate form of intelligence, and a class where they face challenges and need to learn to apply their will. In this way, students who don't excel in traditional "academic" forms of intelligence still learn self-esteem and innate skills in their schooling. At the same time, students who naturally excel in the academic world are confronted with disciplines that do not come as easily, and there they learn the valuable lesson of striving to overcome challenges – and respecting other classmates who do succeed where they have struggled. They also see their classmates face their own natural abilities and challenges. This models to each student that we each have skills and troubles, that that is just part of being human. Yet, we learn to strive.

Arts Integration

"Waldorf education is often called an "arts-based" educational method (Prager, 2001; Prescott, 1999; Uhrmacher, 1995), meaning that the arts are not segregated into special classes, but are interwoven throughout the whole curriculum (Harrington, 1993). Drawing, sculpting, music, poetry, drama, and dance are integrated into each subject, accommodating multiple learning styles and enabling students to develop many forms of intelligence in the course of their study. The Waldorf system, therefore, seems to avoid the problems associated with over-valuing intellectual epistemologies (Arnowitz & Giroux, 1991; Asante, 1991; Noddings, 1995; Reece, 2006).

Art is integrated into core content on a daily basis. Students in grades one through eight engage the visual arts daily in their Main Lesson book work (see explanation in a following uniqueness). Students in all grades annually perform plays, and daily sing and make music, do creative movement, and recite poetry. This type of arts integration has been proven to have positive effects on student achievement, engagement, and 21st Century Capacities. The arts integrated curriculum develops the emotional capacities of students and allows new intellectual concepts to be processed, and thereby remembered, through the child's heart.

Uniqueness #2: Developmental Model

The 7-Year Phases

The first two core principles of Public Waldorf education, which are foundational to all Waldorf-inspired schools, are holding a coherent image of the developing human being and having a shared understanding of child development.

Core Principle #1 of the Alliance for Public Waldorf Education states, "Each human being is a unique individual who brings specific gifts, creative potential, and intentions to this life. Public Waldorf education addresses multiple aspects of the developing child including the physical, emotional, intellectual, social, cultural, moral, and spiritual. Through this, each child is helped to integrate into a maturing whole, able to determine a unique path through life. Rudolf Steiner's educational insights are seen as a primary, but not exclusive, source of guidance for an understanding of the image of the human being (<https://www.publicwaldorf.org/core-principles>)."

Core Principle #2 states, "Human development proceeds in approximate 7-year phases. Each phase has characteristic physical, emotional, and cognitive dimensions and a primary learning orientation." The Public Waldorf educational program, including the curriculum, teaching methodologies, and assessment methods, work with this understanding of human development to address the needs of the individual and the class in order to support comprehensive learning and healthy, balanced development. Our developmental perspective informs how state and federal mandates, including curriculum sequence, standardized testing, and college and career readiness, are met. (<https://www.publicwaldorf.org/core-principles>)."

Sun Mountain Community School will be based on these public Waldorf core principles which were developed out of Waldorf educational core principles. The 7-year phases mentioned above follow the developing consciousness of the children.

- In the first 7 years, they are developing physically and emotionally and these areas are of primary focus.
- From ages 7-14, children are connecting more and more with the world around them, becoming familiar with and intrigued by formal learning and understanding.
- From 14-21, students are connecting with the world through their intellectual capacities to develop sound judgment, thinking and ethics.

The curriculum topics are chosen to carefully meet the students' capacities so that when they meet a specific topic, they are ready to deeply explore that topic through personal connections and deep understanding. The learning should always be answering a question for the student that was already brewing inside of them. Waldorf teachers experience that instruction to be more effective and enjoyable if it is at the developmental level of the students (Huchingson & Huchingson, 1993).

The grades school ages, 7-14, are also characterized by “turning points” in development that also guide the curriculum. For example, when children are around age 9, they begin to see the world differently and can separate themselves from the world around them. They are now ready to grapple with ideas that concern the past and the future as well as differing views and experiences from their own. Another shift occurs around the age of 12 when children grapple with and recognize the implications of cause and effect. Before this time, they may be told about the ideas of cause and effect, but will not fully understand and experience that concept. This is then the time for formal scientific study to begin as the students can fully enter into the ideas and out of themselves begin to make connections and conclusions (Steiner, 1919). Waldorf-inspired teachers view their roles as seeking to develop relationships with their students and then create lessons that support the unfolding learning and development of those students. An understanding of the Waldorf developmental model guides teachers in this endeavor.

The Approach to Kindergarten

Directed academic instruction and activities are purposefully de-emphasized in the Waldorf-methods Kindergarten; the emphasis lies on the foundation (pre-academic) skills and experiences. Waldorf-inspired schools recognize that the young child learns primarily through imitation and example, and that their learning is best supported in a home-like setting grounded in practical activities that are of immediate interest.

Teachers focus on allowing children to develop: their imagination; their curiosity and ability to use their senses when observing the world; their socializing skills; and their self-confidence while interpreting the world in preparation for the higher levels of cognitive thinking developed in the later grades. The gesture of early learning is to promote children’s engagement with the world around them.

Waldorf kindergarten works with a developmental picture of the young child that builds experiences on the wonderings and questions that have already arisen in children. Activities and approaches remain in the developmentally appropriate place and scale. Once a question has arisen in the group, the teacher will go deeply to explore while posing questions like “I wonder”, or “What do you see?”, or “I noticed that too”, respecting children’s process and allowing it to develop with self-interpretation and wonder, free of informational downloads.

Developing social skills, such as playing and interacting with other children (by sharing toys and taking turns and being inclusive with games), is also fostered in kindergarten, and considered core skills at this age.

The kindergarten program lays a foundation for the unfolding of formal academic curriculum of the grades, establishing rhythms and engagement. Pre-academic material, however, is not presented through formal lessons, but rather is embedded in the activities and rhythms of each day.

Different Trajectory of Testing Excellence Explained

This is an important aspect of Waldorf education when it comes to quantitative testing. Citations given so far are absolutely true, that Waldorf students test higher, on average in the studies shown, than their neighboring standard school. However, the learning curve on this statistic needs to be looked at closely. Because Waldorf teachers follow a developmental model, kindergarten, 1st grade, and 2nd grade teachers are preparing their students for literacy by building oral language, phonological awareness, vocabulary, background knowledge and deep listening comprehension. The kindergarten, 1st, and 2nd

grade teacher also explicitly teaches phonemic awareness, phonics and decoding, but the pacing is slower than core standards in those years.

The developmental methods esteems that students learn faster when information is presented when the student is ready to take that content up. This focused and deep preparation period can mean that students in public Waldorf schools in kindergarten through 3rd grade tend to test below their contemporaries. By fourth and fifth grade, because the developmental model was followed, they gain great ground in literary skills and are on par with their contemporaries. Middle school Waldorf students are consistently scoring above their contemporaries in literacy.

Figure 10 - Standardized tests score comparisons in the CA Waldorf-inspired public schools and other public schools of the same district (Twenty Years and Counting, 2012).

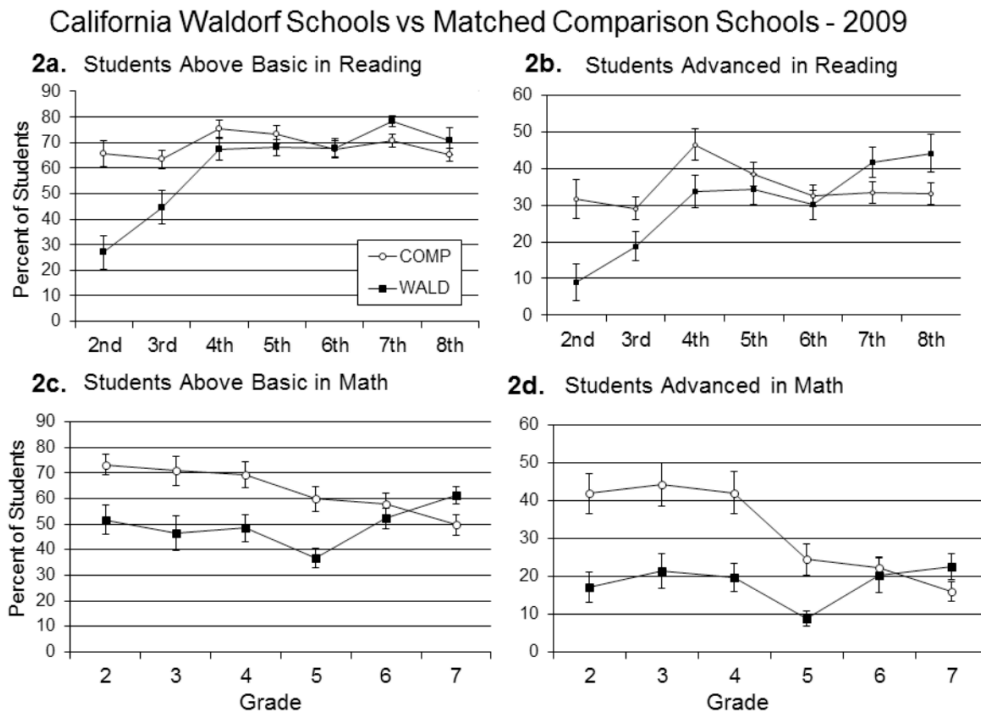
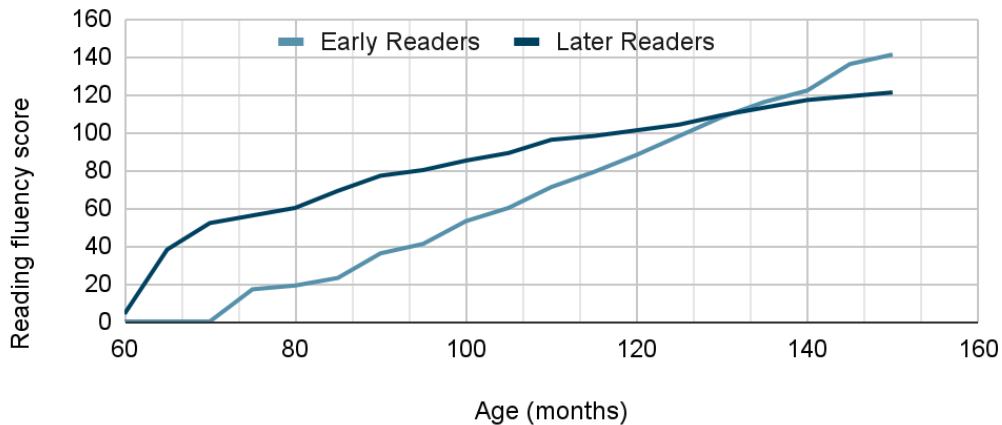


Figure 2. Waldorf school scores compared to comparison schools matched for SES. Scores are presented as those students performing at or above the proficient level (2a., 2c) and those performing at the advanced level (2b, 2d). Waldorf students performed more poorly in early grades, but these differences were no longer present in the upper grades. (Error bars = SEM).

Figure 11 - Estimated decoding and reading fluency trajectories as a function of chronological age and reading instruction age, data summarized from two studies taken in New Zealand (Suggate et al. 2013).

Estimated decoding and reading fluency trajectories as a function of chronological age and reading instruction age.



“Public Waldorf students take annual standardized (STAR) tests in grades 2 through 11. By seventh and eighth grades, all of the North Bay schools consistently exceed their district scores. However, due to the developmentally based curriculum, second and third graders in North Bay public Waldorf schools generally score poorly because they have not yet been taught much of the test material” (Credo School of Arts, Letters, & Sciences, 2012).

Additionally, the Waldorf developmental model focuses on writing as a pathway to reading. Uniting writing and reading has been demonstrated to increase reading skills. The 826 National publication *The Truth About Writing and Reading in America* published in 2021 recommended that to develop literacy, we must, “Make the relationship between reading and writing explicit through discussion, examples, and publishing student work. And start early” (Chiong & Oliveira, 2021).

Through writing, students are strengthening hand muscles and left-brain/right-brain cross-overs. Waldorf schools value the teaching of handwriting over typing/keyboarding. This is another long standing practice that has been proven to support strong literacy skills. Diana Rigg, founder of educational program and publishing house PLD, wrote concerning handwriting, “There is increasing evidence of a link between the fine motor skills required in handwriting and the development of cognitive skills which lay the foundation for later academic success. When children write letters, they demonstrate better letter recognition skills which means they learn to read quicker” (Rigg, 2023).

Uniqueness #3: Looping

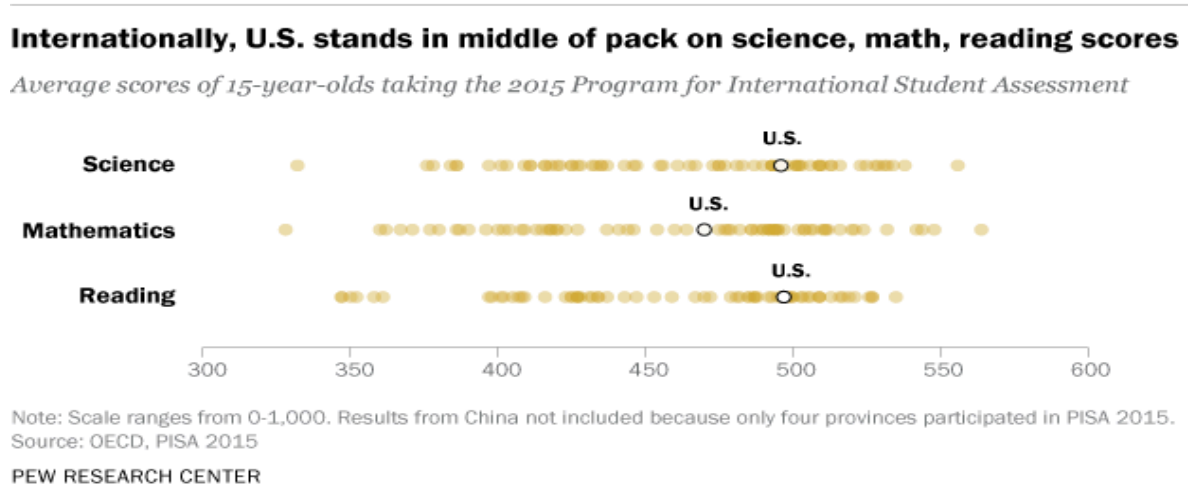
What is it? Looping teachers stay with a class for several years. Whereas, in a traditional Waldorf school the class teacher may stay with one class of students for grades 1 through 8, at Sun Mountain Community School we have chosen to adapt this approach to better meet the needs of the public

education realm. There will be a single kindergarten teacher as well as a single 1st grade teacher who stays in that role year after year. The first grade teacher will excel at bringing form and cultivating good learning habits to a classroom of new learners. From 2nd-5th grade, one teacher will loop (move up with their class from year to year, and then “loop” back down to pick up a new class of 2nd graders) with students as the Lead Teacher. Middle school students will have a “Homeroom Teacher” that is with the students daily through their middle school experience, while they rotate between the lead teacher trained and certified in their current block subject. The resulting connection between student and teacher acts as a guarantor for student well-being, which in turn adds a higher probability to the continued success of the student in all realms, academically, emotionally, and socially.

What are the benefits of looping?

Academic. There are many educational advantages to this approach that allow teachers to be with the same group of students for multiple years of study. Looping teachers do not need to spend two months of the start of each new school year trying to get to know their students. Nor will the students spend the first weeks of the year trying to adjust to new expectations and testing the teacher’s limits. The continuing teacher will already be aware of the individual learning styles of their students; who learns slowly and needs lots of practice; who learns quickly and needs to be challenged. Renowned educational researchers have cited specific advantages to the looping model, such as maximized instructional time because less time is needed during the normalization phase in the first part of the year, and improved test scores because a teacher is familiar with what makes each student tick. The chart below shows how the United States scores way below other industrial countries in student test scores. At the far right of the continuum is Finland. Finland, who is known for some radically different but highly successful approaches to education (many reflected in the Waldorf approach) attribute much of their testing success to looping (Grant, 2023). Estonia has followed Finland's example of looping and has seen some of the world's lowest rates of low performers but also a remarkably small gap between low- and high- income students (Hatch, 2017).

Figure 12 - International comparison of American students’ testing scores. (Silver, 2017)



As cited in Dr. Telfer-Radzat’s recent 2022 dissertation titled, “Waldorf Education: Investigations into the Development of Executive Function,” looping is shown to improve scores by several months for every two years with the same teacher (Telfer-Radzat, 2022). More broadly, the research that has been done to this point shows that Waldorf Charter Schools students significantly outperform traditional public-school students by 8th grade (Twenty Years and Counting, 2012). It should be noted that there

are instances across the grades when the public Waldorf model does not perfectly mirror the State Standard at particular grade levels due to its developmental approach, which devotes attention in the early years on foundational skills. By 8th grade, the content has fully aligned with and completed all the State Standards.

“Students who reported feeling unsafe in the classroom experience a consistent decrease (0.03 standard deviation decrease) in math test score.” Furthermore, “15% of students who felt unsafe in the classroom also reported that they stayed home most or all of the time because they felt unsafe at school,” 2 days more, on average, than students who felt safe. These higher absentees then also scored lower on the math and English language arts standardized tests (0.04 standard deviation decrease in test scores) (Lacoe, 2020).

Teacher Benefits of Looping. Teachers are able to tie in past experiences and lessons into current ones, so that the students' education is not only interdisciplinary within the year, but through the years as well. Specialty teachers of world languages, music, games, movement, woodwork and handwork also are traveling with each student through the grades, creating for each child the sense of security from which learning can take place and an accurate feeling of “being seen”. Teachers also remain engaged throughout the years as they strive to master a new content each year.

Extra benefits for low-income students. Many children's lives are filled with constant change; moving between two parent's homes or having three to four extra-curricular activities crammed into the week. Nearly half of the U.S. population moves every 5 years, and this number is increased for low-income residents (Phinney, 2013). Furthermore, over a thousand Santa Fe school-aged children experienced homelessness during the 2019-2020 school year (Figure 13). It is now essential for schools to step forward to provide some care and continuity for those students who are missing that element outside of school. Teachers that continue to teach the same children year after year, establish trust that allows the relationship between student and teacher to grow. These teachers develop a more discerning eye and are able to perceive problems before they become painfully obvious and more difficult to address. Lacoe found in his study that “feeling unsafe” in the classroom happened more often with low-income students (Lacoe, 2020).

Figure 13 - Metric: Number and share of public-school children who are ever homeless during the school year (US Department of Education Local Education Agency data, 2019-20)

Metric: Number and share of public-school children who are ever homeless during the school year

Santa Fe City, New Mexico

Number homeless	1,045
Share homeless	5.7%
Data quality	<i>Strong</i>

Source: US Department of Education Local Education Agency data, SY 2019-20 (via ED Facts Homeless Students Enrolled). (Time period: School Year 2019-20)

Benefits to the community. The benefits of looping extend into the community as teachers and parents form a bond in which they support each other. Because teachers understand that these students may be with them for up to 4 years, there is a mindset from the beginning that everyone must work together. As soon as a new student is enrolled, measures are taken to develop a rapport with the family. This may include a home visit, class meetings, outings as a group, and/or assigning a volunteer “buddy” family or family member and lots of personal interaction.

Conclusion. “This sustained relationship fosters deep and lasting ties between teachers and their students as well as teachers and the families of the children in their classes. The curricular freedom that looping affords its teachers directly impacts the pacing of instruction as well. When teachers have the luxury of time, as well as the primary responsibility for their student’s education, they are not under pressure to prepare students to a certain level of proficiency at an arbitrary point in time in order to hand off to their next teacher. Teachers can be responsive to the students’ needs, readiness for new learning, and skill development in designing their instruction.” (SCOPE, 2015)

Uniqueness #4 - Thematic Approach - Teaching in Depth

Main Lesson

The Main Lesson is a two hour intensive class that takes a deep dive into a single subject for 3-4 weeks. Like the thematic approach itself, the Main Lesson is designed to provide multiple entry points for student mastery of core content, integrating mental activity with practice, be it supplemental music, movement and/or hands-on activities that engage the senses. Student-created “textbooks” artistically and creatively capture their Main Lesson content through drawings and other artistic media along with written narratives and other visual content (Bright Water, 2023). Main Lesson occurs at the beginning of the day, when the students are most alert and receptive to learning. A successful Main Lesson connects with the student through “head, heart, and hands,” cultivating clear, independent thinking, an emotional connection to the work and content, and motivation to take action to achieve goals and make meaningful contributions. Each Main Lesson follows a two to three day rhythm, depending on the week's schedule.

A new skill introduced on day one, often delivered in the context of a story, from fairy tales and fables in the early grades, to biographies and historical accounts in the later grades (see Uniqueness #6 - Tools of the Classroom for research on storytelling). Then, students “sleep on” this new information and it is recapitulated on day two. This review fortifies retention, clarity, and confidence. This rhythm of story and concept recall also assists in maximum sensory processing and deep learning. The third day, students begin the work that correlates with this new concept. This “New/Review/Do” (sometimes called “I do, we do, you do”) model, carried out over multiple days, often overlaps and allows students time to take in new information slowly and thoroughly.

Each main lesson has its own rhythm. It typically looks like this:

- The morning begins with opening rhythmic, skill-building activities in literacy and numeracy, speech, movement, and coordination practices. This is often called the “morning rhythm.” Then, teachers can include playing the flute, singing, reciting poetry and verses. This part of the morning rhythm incorporates the subject matter of the main lesson block. For example, while students are learning about Roman history, they may learn a verse in Latin or sing the song “O Roma Nobilis” each morning during that block. These warm ups are designed to inspire and enliven the students.
- Review of previous day’s material begins with students recapitulating the previous day’s story, concept, or experiment, with minimal but conscious guidance from the teacher, often called “the recapitulation” or the review. In “Classroom Instruction That Works,” Dr. Robert Marzano established that summarization and effective questioning boosts student achievement more than nearly any other known teaching strategy. Additionally, research in cognitive psychology has found that long-term memory is greatly improved if students process material in a deep and meaningful way, such as occurs during sleep. Self-generated elaboration (as happens when a child retells or summarizes information) leads to better recall than mere study of material, as it establishes a long-term memory trace. In this way, the content becomes “possessed” and “reconstructed” in new ways by the students. (Marzano, 2001)
- Then, the teacher introduces a new concept, story, or experiment. In a history block, this might be a story from an original text or the biography of a key figure. In a mathematics block, this might be a new concept around the study of fractions in 4th grade or geometry in 6th grade or the story of this concept's first discovery. This information is delivered orally by the teacher, enhanced with artistic expression such as chalkboard drawing or watercolor painting.
- The teacher will guide students through specific learning activities, teaching from the whole-to-part, which typically starts with concrete and familiar examples and moves from there into more abstract concepts. Ideas will be presented within a broader context, first using narrative, pictures through chalkboard drawings, and an experiential, hands on approach and broken down into specific concepts (Dunn & Dunn 1993).
- Finally, the class closes formally. All work spaces are cleaned up. The teacher brings all students together as a whole class again and a “closing verse” is spoken by all before dismissal.

Teaching in Blocks

To best present an interdisciplinary approach to subject matter, Waldorf education uses a “block system” approach to subject matter, giving the ability for students to immerse themselves in each subject. The Main Lesson moves through the year in blocks of time, with each block taking a deep dive into a single subject for 3-4 weeks. Specialty teachers are familiar with each grade’s blocks and often overlap their own subject goals with the Main Lesson topic. Similar content may echo across various subject areas, connecting learning and creating a sense of wholeness for students. For example, in 5th grade while students are learning Ancient Greek history in Main Lesson, they will be taught the skills of the first Olympic Greek games in Movement class. A Spanish teacher might introduce vocabulary about plants during a fifth grade botany block. In 7th grade math, students learn positive and negative

numbers when they are immersed in Renaissance history when bankers first began keeping ledgers. When eighth graders study the Industrial Revolution in history, they begin using sewing machines in handwork class, mechanizing their craft. In this way, the pedagogy and the material is often unified, enriching the learning experience.

“Waldorf education emphasizes the interrelatedness of all things. Therefore, the curriculum is highly interdisciplinary” (Goral, 200). Rather than moving from class to class in a fragmented day of multiple subjects, Waldorf uses a block method (Uhrmacher, 1995). “The students will work on a topic in their Main Lesson block for two to eight weeks, approaching it from multiple angles and learning it in depth” (Huchingson & Huchingson, 1993; Reece, 2007).

Uniqueness #5: The Use of Rhythm

Waldorf education depends on rhythmic schedules of education; throughout the lesson, the day, the week, and the years, to make instruction as effective as possible. Students are prepared to receive carefully constructed content, thorough and developmentally appropriate. Then, they are allowed time to digest that information, by processing the concept through artwork, manipulatives, or performance. Often, then, the content is “put to rest.” Nonetheless, students are asked to recall the information from the previous day's work, as well as content from previous years'. Each time a student revisits a material, it is embedded deeper into the child's understanding.

In-breath/Out-breath Rhythm

There is a natural rhythm in accordance with hours, days, weeks, months, and seasons that deserves formal recognition and incorporation into education. The day is structured to create a rhythm between periods of physical activity, purely mental activity, and artistic activity (Harrington, 1993; Uhrmacher, 1995). As mentioned before, the Main Lesson block, which is the most mentally taxing, will be taught in the morning hours when students are most rested, alert, and able to concentrate. During the middle school years, when students need later sleep, the main lesson will follow a more movement-based class first thing in the morning. Physical education and other stimulating blocks such as handwork or music, will be taught in the afternoon. All of this is intended to support a student's learning and help the student develop a sensitive emotional nature (Reece, 2007).

By following their biorhythms, we believe students will transition easily between subjects and increase their ability to retain and acquire the education they are receiving. They will also develop a sense of stability and understanding about the world as they engage in markers of the days of the week, the changes in seasons, and other milestones. By following a rhythm that allows for a flow between listening and doing, speaking and writing, concentrating and relaxing, mental and practical activities, individual and group work, a balance in education is achieved, which supports the social/emotional, physical, and intellectual faculties of each student. A rhythmic approach to teaching encourages and maintains interest in order to enhance learning and memory. Information can be absorbed and later “re-remembered” within a wider context that includes the student's own experiences. Teachers will introduce new experiences allowing time for students to assimilate previously taught material. Subjects that need regular practice (world languages, spelling, math facts, grammar, music, etc.) will be distinguished from the subjects focusing on new content.

Beyond the classroom, a school wide rhythm will include the celebration of seasonal festivals, which provide a connection to nature and the community. Our parents will be supported in their efforts to bridge the rhythms established at school into home life so that students have a sense of clear and predictable patterns at home (meals, chores, bedtime rituals, sharing family stories, reading, etc.). Parent engagement events, especially in the early grades, will often gently show parents the benefits of these predictable rhythms and give helpful tips on how to initiate and utilize them. As a result of these

concerted efforts, SMCS students will be provided with a strong and secure foundation that fosters healthy development and resiliency.

Spiral Learning

Moreover, the approach to content “spirals,” that is, students will take a topic that is related to an earlier topic, perhaps taught the year before and approach it at a deeper level (Easton, 1995; Harrington, 1993). The goal is depth of knowledge and learning how to think rather than the accumulation of factual knowledge.” (Reece, 2007). The approach to content will present large academic concepts year after year, beginning with introductions and then returning to that concept in consecutive years with deepening levels of manipulation of that concept. Returning to a subject year after year allows a student to build on the success of past years. This provides the ability for students to get ever deepening knowledge of a subject matter through revisiting a subject from a point of greater understanding and the new perspective that development allows us.

Incorporated Community Cultural and Seasonal Festival Life

Waldorf schools follow seasonal rhythms with festival life that celebrates seasonal events, honors nature, and builds the cultural fabric of the community. SMCS will host four community festivals a year - harvest festival, Halloween festival, a winter festival, and a May Day festival with different classes switching contributing roles in that festival each year. In addition, each class often takes up other festivals during the year that correlate with the curriculum and/or the families who are part of the class. This can be a way to integrate multicultural learning (ie, the celebration of Diwali, the acknowledgment of Ramadan, the lighting of Menorah candles and singing seasonal specific songs from different cultures) as well as acknowledge the different seasons. Waldorf also believes that the sense of rhythm (calendar and musical rhythm) is important to the emotional life. This creates community and a sense of connection with the earth and the seasons, both of which add to the emotional health of a child and the development of social intelligence.

Conclusion

All of these rhythms, from within a two hour lesson to throughout the 13 years of the content standards of our complete vision of the school, gives children of different backgrounds a sense of security, confidence in their ability to manage challenges, and connection with their own rhythms and the rhythms of the community. This builds their interpersonal and intrapersonal intelligence.

Uniqueness #6 - Tools of the Classroom

Storytelling as an Instructional Method

Oral, memorized storytelling is the foundation of Main Lessons. Language arts, history, geography, and even math (1st-3rd) and science (in 4th and 5th) are taught through narrative. Stories are shared from a wide range of sources: fairytale, folk lore, legend, fable, parable, mythology, and literature before moving on to recorded history and historical fact. Zoology is enlivened with engaging stories of animal behaviors and encounters. Astronomy becomes valuable when students hear the stories of sailors, navigating their way across the open seas. Even math is made more fascinating with the biographies of the mathematicians, such as who discovered which new algorithm and how that changed human thinking at the time. Biography is used to strengthen student identification with people who made a difference.

Stories engage interest and memory. Communicating, exchanging viewpoints, dialoguing and debating are part of lessons. The groundwork for such abilities is laid down in the younger classes. Teachers cultivate the quality of listening and speaking in class. Children who engaged in storytelling and story-reading in class and at home had increased scores in creativity, literacy tests and problem solving

when compared to children who did not engage in such activities (Peters, 1993). The following day, students then repeat the stories back to the teacher. This teaches students their own oral expression, narration and composition skills, explores the contextual flow of a story, and it shows the teacher which elements of the story impact any particular student.

Stories engage the emotions and activate areas in the brain that focus attention. Deep engagement with stories has been shown to improve literacy skills and memory (Cantrell, 2014) and promote critical (Cantrell et al., 2014) and creative thinking (Phillips, 2000). Storytelling nurtures the capacity for innovation and creativity by fostering the imagination (Zak, 2013). Cognitive scientist Mark Turner says that stories are the fundamental instruments of thought. Stories encapsulate knowledge, information, context, and emotion in one package, making them important cognitive events. Stories are one of the basic tools of understanding invented by the human mind. They convey complex ideas in meaningful and memorable ways (Agosto, 2013; Collins, 1999).

Stories are used to indirectly address emotional problems in the classroom. Stories promote emotional growth because they allow teachers to implicitly address difficult emotions like anger, fear, and isolation and enable students to face and accept their own circumstances by coming to terms with their own needs. Through the use of tailored stories, teachers can also address conflicts in the classroom.

Storytelling is an important human activity because it is through the stories that we tell ourselves and others that we create meaning and build community (Davies-Gibson, 1994; Giroux, 1992, p. 131-133). When Waldorf teachers tell stories, they are not only conveying information; they are also trying to create an aesthetic and moving experience through which the student can construct and internalize a sense of meaning (Uhrmacher, 1995). Often, the stories and biographies chosen are intended to provide patterns for the children so that they can experience how another human being faced and overcame challenges, while simultaneously imparting information. Similarly, biographies of great thinkers teach students what their thoughts were and also how they arrived at them (Ruenzel, 1995). Storytelling also develops listening skills, memory, and attention span (Harrington, 1993; Oppenheimer, 1999).

Storytelling bridges cultures. By the time students graduate the 8th grade, they have heard cultural myths from all over the world. Often, each geographical or history study will include a creation story of that area. Students will observe, without being told, that culturally traditional stories invariably overlap with a story they have already heard. This strengthens the feeling that we are all much more alike than we are different, an attitude that is felt within the different cultures of a Waldorf classroom.

The Main Lesson Book

Each new concept is reviewed and retained by creating a guided Main Lesson Book (MLB) “page”. This can be a drawing, writing, or scientific observation recording depending on the age of the student and subject. These esteemed pages are carefully kept throughout the year. At the end of the Main Lesson, the student gathers their MLB pages, makes a cover, and binds the compendium. This gives the Waldorf students their own textbooks to collect throughout the grades and a reference to their own developing intellect and artistic capacity. Plus, the student-made textbooks allow students to express both mastery of educational content and their individual creation of a book. Textbooks can be dogmatic, inflexible and present only one point of view. Waldorf teachers enjoy freedom in how they choose to deliver each grade’s specific content. They use a variety of resources in preparing their lesson plans and deliver lessons orally in the form of storytelling (see Figure 21 and 22 for examples of texts commonly used by teachers for different subject matters). Teaching is alive and designed to interest and address the

specific children in each class; the relationship between teacher and student is an important component in effectiveness (Credo School of Arts, Letters & Sciences, 2012).

As the study “What the Arts Change About the Learning Experience” concludes, “Involvement with the arts provides unparalleled opportunities for learning, enabling young people to reach for and attain higher levels of achievement.”(Artsedge, 2019). As the study describes, integrating the arts in education changes the learning experience in multiple ways:

- The arts reach students who are not otherwise being reached.
- The arts reach students in ways that they are not otherwise being reached.
- The arts connect students to themselves and each other.
- The arts transform the environment for learning.
- The arts provide learning opportunities for the adults in the lives of young people.
- The arts provide new challenges for those students already considered successful.
- The arts connect learning experiences to the world of real work.

Low Media Use

At SMCS, we believe monitoring the influence of media and video games and ensuring appropriate use of technology is valuable. As advocates for childhood, SMCS will work hard to establish a culture free from consumer-oriented messages and commercial images. Today’s children are immersed in an electronic environment. According to a 2018 study by the Kaiser Family Foundation, 8-18-year olds in the U.S. spend 7.5 hours per day using media, not including use in the classroom. The study notes that this is almost the amount of time in a workday and occurs seven days a week rather than five. Moreover, because young people often use multiple devices at once they are consuming 10.5 hours of media content per day. The study also reported that children who were heavy media users were more likely to report getting fair or poor grades (mostly C’s or lower) than other children. Even after controlling for parent education, gender, and other variables, the results were still significant. Almost half of all heavy media users (47%) versus less than one quarter of light media users (23%) said they earned mostly C’s or lower. Over-exposure to electronic media hampers the development of the child’s imagination, memory, and overall well-being. Research indicates children use less mental effort when processing information from electronic media than they do from print (Rideout et al, 2010). Our concern is that children who experience substantial doses of electronic media may never learn to process information in the complex way that promotes creative academic achievement.

Based on teaching knowledge, we believe that when media exposure is limited to weekends only, students are more focused, calm, and engaged in their academic learning. When students watch television and play video games during the school week, we believe there will be a qualitative difference in students’ behavior, including exclusive rather than cooperative play, a lack of socialization experiences, a lack of imagination in their work, and an enhanced need for immediate gratification.

Therefore, to engender an environment in which learning best occurs, SMCS has adopted a policy of limiting media exposure for students, especially in the lower grades. While the American Pediatric Association is in the process of revising screen time suggestions, recent research suggests that background effects of media screens are harmful to the development of the brain’s executive functioning. One area of research involving media and screens that has recently become robust is the detrimental impact of background television, Dr. Barr said. “Background TV actually disrupts the children’s activities—their play, the parent-child interactions, and it’s related to poorer executive functioning,” she said. “When it is on, play is not as complex, and that’s a really important part of how a child develops” (Rideout et al, 2010).

The value of technology is extremely important today, and in keeping the core guiding principles of Waldorf philosophy at the forefront of our approach, Sun Mountain Community School advocates waiting to introduce technology to children until they've developed discriminating computer literacy skills. Computer skills and technology ethics (Cyber Civics) are taught in middle school, and by high school, Waldorf students are expected to use technology as a tool of research and self-expression. High school students are taught the use of programs that help them to express themselves in other subjects and content areas. Even at this point, screen use does not take the place of the teacher, and in fact, the teacher will model for the students how to appropriately navigate web, media and phone-based technology in an ethical and thoughtful way (i.e., what not to post, the consequences of posting/sharing on the internet, how texts/pics can affect friends/family, age appropriateness, etc.).

International Studies Support Concur That Relationship of High Screen Time and Lower Academics

"The Quebec Longitudinal Study of Child Development cohort study found a long-lasting connection between early screen media exposure and cognitive abilities, with each one-hour increase in TV exposure at two years of age corresponding to a 7% unit decrease in participation in class and a 6% unit decrease in math proficiency in the fourth grade [8]. A Spanish research study discovered a negative correlation between the use of screen media and academic achievement, indicating that increased screen time was associated with lower academic performance. Similarly, a study conducted in the United States found a significant link between higher levels of media multitasking and lower scores on standardized tests measuring academic performance in mathematics and English [9]." Muppalla, S.K., Vuppalapati, S., Pulliahgaru, A.R. and Sreenivasulu, H. *Effects of Excessive Screen Time on Child Development: An Updated Review and Strategies for Management* [Cureus](#). 2023 Jun.

Uniqueness #7: Outdoor Education and Movement

Frequent Physical Activity and Time Outdoors

We believe students learn best when they engage in frequent physical activity. We achieve this by a predictable yet flexible rhythm throughout the day of quiet studious activities, and opportunities to move such as practicing times tables by jumping rope or tossing bean bags. Because the qualities of physical fitness and health enhance the students' welfare and academic achievement, each child will be encouraged to rise to their individual physical potential. Movement activities, games, and other forms of creative physical expression will be infused into the everyday curriculum. To the greatest extent possible, classrooms and play yard space will be organized to maximize the children's opportunities for movement.

Dr. Kuo and Dr. Taylor found in their study for potential natural treatments for ADHD that

"Green outdoor settings appear to reduce ADHD symptoms in children across a wide range of individual, residential, and case characteristics.. Findings were consistent across age, gender, and income groups; community types; geographic regions; and diagnoses." The only concern brought up in their research is that "nature reduces "symptoms" among individuals without ADHD." They concluded that nature helps all students calm and focus, but that it may be used as a "therapy" for ADHD students." (Kuo & Taylor, 2003)

As a part of the lesson. Scientific understanding of how the brain influences the body, and the body influences the brain, is shedding light on the role movement plays in learning and memory.

Incorporating movement has a significant impact on what students remember as compared to taking in concepts just auditorily or visually. In Waldorf education we use movement as a teaching tool throughout our curriculum. Students skip to a poem they are memorizing, jump rope to their multiplication tables, spell to the rhythm of walking or jumping, learn grammar by walking a prose and pausing during the commas, stopping at the periods and jumping at the exclamation marks.

In the morning rhythm, coordination games are often played to cross the midline or improve hand-eye coordination. These are done with bean bags and often accompanied by songs or poems. A common practice is the incorporation of Bal-A-Vis-X, which stands for “Rhythmic Balance/Auditory/Vision eXercises for Brain-Body Integration.” (BAVX). Research shows that Bal-A-Vis-X improved reading scores in elementary school students. “The standardized tests used were from the Dynamic Indicators of Basic Early Literacy Skills, commonly referred to as DIBELS. The scores indicate that using BAVX as a learning strategy caused a rise in test scores. This has been determined by the increase in test scores of the BAVX group as compared to the control group, who did not participate in the use of this learning strategy. In addition, the sense of accomplishment the students experienced while participating in BAVX resulted in positive feedback and self-esteem that became progressively self reinforcing. (Cosgrove & Ryan, 2006)

As a part of the daily rhythm. Highly-demanding Main Lessons are followed by the “out-breath” of outside play. Play is not just “rest” from learning but an essential component to integrate subject matters and a time to recharge. Waldorf teachers can tell you of times in which they witnessed students “acting out” stories from their main lessons or practicing their jump rope and counting during recess.

As educational field trips. With all the documented benefits of the value of students learning outside, why keep geology, meteorology, plants, and physics inside? Block subjects offer ample opportunities for students to go outside and “see for themselves” the laws of nature and examples of the earth sciences. Teachers take their students outside for an experiment, on field trips to experience the world around them, and, in middle and high school, for service days for river or community clean-ups. These days give students an extra dose of “out-breath” and hands-on learning about the responsibilities of community care giving them more ability to focus more deeply once they return to the classroom.

As a part of the Outdoor program. As seen in the Curriculum, Sun Mountain Community School will pull on the long tradition of the highly developed outdoor program that include hikes and camping trips that expand in time and rigor through the grades. (See Attachment 9 for complete outdoor education program).

INNOVATIVE APPROACHES

Bilingual New Mexico Education

The Sun Mountain Community School will cover all of New Mexico Core Curriculum Standards, including the extensive history of New Mexico. To align with our developmental method and educational program, we will teach New Mexican history in several intensive blocks through the years in both main lessons and Spanish classes. In the traditional Waldorf curriculum, local geography and history is taught in 4th grade. We will teach early New Mexico history at this time. We will add other blocks as well so that the State curriculum is appropriately covered. A second block of New Mexico history will be taught in 7th grade, when students learn about the Age of Exploration. In 8th grade, when students traditionally learn about Revolutions and American history, we will add modern New Mexican history content.

In middle school, New Mexico history will also be brought into Spanish track classes. By middle school, students have had Spanish classes for five years already. In order to continue maintaining engagement and rigor in this subject, SMCS will deliver curriculum content in Spanish (i.e. South America and Central America geography in 6th grade, Spanish explorers in 7th, and the Mexican Revolution in 8th). Our State honors the many languages used here. Because of that, New Mexico offers the State Seal of Bilingualism-Biliteracy program. We are proud to offer our students the history of our state bilingually.

Cyber Civics

The internet and social media are ubiquitous in our modern world. An opportunity exists to teach students specific tools to safely and ethically traverse this virtual universe. Cyber Civics™ is a middle school curriculum, rooted in an understanding of child development, that prepares students to be ethical, confident, and empowered digital citizens. The program includes weekly lessons that emphasize critical thinking and ethical discussion, using role play, hands-on projects, debate, peer-learning, problem-solving, and imagination.

Level 1 - focuses on Digital Citizenship (the norms of responsible, appropriate technology use).

Level 2 - teaches Information Literacy (covers the core concepts of finding, retrieving, analyzing, and using online info).

Level 3 - focuses on media literacy which is "the ability to access, analyze, evaluate and create media in a variety of forms." It addresses the need for critical thinking using media, misinformation and media stereotypes.

The 2023 Surgeon General's report states that media can be both helpful and harmful to adolescence. It stated that, "A longitudinal cohort study of U.S. adolescents aged 12–15 (n=6,595) that adjusted for baseline mental health status found that adolescents who spent more than 3 hours per day on social media faced double the risk of experiencing poor mental health outcomes including symptoms of depression and anxiety." (Riehm et al. 2019). SMCS sees it as a part of our mission to teach students directly how to utilize the benefits of media while navigating through the potential risks.

Adapting Festivals to Fit Our Local Community

Cultural and seasonal festivals are a part of any Waldorf campus. Each campus festival, however, should have a different feel and traditions according to the populations who are creating them. We commit to having our festivals include Spanish language when they address the public. Our yearly, school-wide "All Hallow's Eve" event includes a Dios de los Muertos celebration. We strive to have the food and language of New Mexicans experienced in our festivals. Festivals are an opportunity to engage with cultural diversity of the school and the local community, build connections between cultures and traditions and forge citizenship of the world in young learners through authentic participation.

World Languages throughout the Grades

Although there is legislative support for students to become bilingual by the time they graduate, most schools don't begin the practice of formal world language studies until high school. Fernando Rubio, in his study of the impact of early language learning said, "when it comes to language learning, younger is always better." He also said, "Starting earlier and learning a second language for a longer period of time is most likely to lead to proficiency." (Rubio, 2022.)

The Waldorf Program emphasizes the importance of studying world languages all through a student's schooling. Students will begin Spanish classes in grade one (see Amendment 8 for a full description of

the Spanish educational program), following informal Spanish or other language use in kindergarten. World languages are taught in the manner that first languages are learned. Early years of instruction are immersive and song and game based. Students learn the tonation and rhythm of a language as well as entire songs and poems before they begin memorizing vocabulary lists. The paralleling of Spanish lessons and main lesson blocks also offer fascination with the language. By middle school, Waldorf education program content is being delivered in Spanish.

Having a full Spanish program is beneficial to Spanish EL learners as it shows a value for their native language. It allows Spanish EL students to feel the comfort of Spanish language classes a few times a week and gives them an experience of being “at the head of their class” and allows them to be beneficiaries to other students learning Spanish. It also allows them to hear a story they may have heard in English in the main lesson in Spanish, which could offer them confidence in their main lesson.

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B. Mission-Specific Goals

The Amended Charter School Act Requires that new charter applications include: the goals, objectives and student performance outcomes to be achieved by the charter school as well as a description of the charter school's plan for evaluating student performance, the types of assessments that will be used to measure student progress toward achievement of the state's standards and the school's student performance outcomes, the timeline for achievement of the outcomes and the procedures for taking corrective action in the event that student performance falls below the standards (NMSA 22-8B-8(E))

This application requirement prepares the applicant team for the Performance Framework contents, which will be negotiated with the PEC if the proposed charter application is approved. Specifically, the performance framework allows for the inclusion of additional rigorous, valid and reliable indicators proposed by a charter school to augment external evaluations of its performance, provided that the chartering authority shall approve the quality and rigor of such proposed indicators and the indicators are consistent with the purposes of the Charter Schools Act (NMSA 22-8B-9.1(C))

B. (1) Mission-Specific Goals

Identify and provide two mission-specific goals or Indicators in the following section.

The Sun Mountain Community School (SMCS) is a community of families and educators dedicated to cultivating the intellectual, social, emotional, physical and consciousness capacities of the developing human being. Our mission is to educate the whole child, using an age-appropriate approach to content and skills based on principles of Waldorf Education and the work of Rudolf Steiner. Our students engage in rigorous academics, develop connections to the natural world and moral discernment, and achieve an appreciation of themselves and others.

GOAL #1: WHOLE CHILD EDUCATION - HEAD, HEART, HANDS

Alignment with Our Mission

SMCS uses 100 years of methodology, practice and innovation of the Whole Child Approach, to apply the Developmental Method and integrated subject matter to create students who are academically above state average, emotionally and socially capable and satisfied students, and students with strong wills and healthy bodies. Approaching each child as a whole being cultivates in them the self-confidence to identify their personal goals as young adults and the will to implement their goals into the world.

This goal aligns with our mission because it is explicitly and implicitly our mission. It is learning how to measure these qualities that is the goal of the charter effort. In this way, our school and the NMPED can quantify the success of our unique approaches and we can continue to support children who excel in a variety of different intelligences. We use the SMART approach to achieving our goals.

Figure 14 - Hand-Coded Counts of Positive/Negative Comments taken from CA Waldorf-inspired public schools (Twenty Years and Counting, 2012).

Table 6
Waldorf Hand-Coding Counts Based on Positive/Negative Comments

HANDCODING WALDORF	Frequency Counts	
	Positive	Negative
Teacher	208	52
Arts	171	16
Community	168	6
Waldorf Curriculum	78	12
Love of Learning	84	0
Academics	53	24
Music	73	2
Parent Involvement	64	10
Holistic Ed	56	2
Leadership	25	32
Relationships	47	6
Second Language	35	0
Discipline	7	18
Testing	10	6
Slow Pace	4	11
Media	4	4
Special Needs	1	6
TOTAL	1088	207

Specific

To identify our success in teaching the whole child, teachers, administration, and the School Board will monitor students' academics, their social and emotional life, and their will (as seen in physical strength and coordination), as well as their determination and self-control.

Academics

Formative. The Waldorf approach has a long tradition and historical strength of formative assessments. A full description of formative assessments can be found in Section II. H. (1). After the teacher presents to the whole group, students commonly are broken up into partners or small groups (sometimes of equal capacities and sometimes with planned varying capacities) to explore assignments with peers. Teachers will habitually use MLSS (Multi-Layered Scaffolding Support, further described in D. (2) Equity Plan) approaches to formatively assess learners in the classroom.

Specialty subject classes continually test students' abilities in formative ways. Every stitch in an early handwork class tests a child's ability to cross the midline. Music classes test a child's capacity to read music by playing in an orchestra multiple times a week. Spanish teachers test a student's comprehension to see if they follow directions given in Spanish in a group game. Graded and ungraded quizzes and block tests are given. Group recitation, games and group projects, which require content knowledge without resulting in grading, are also used. SMCS will also provide semester report cards for students in grades 6-8, which address the content of each area within the curriculum, and will provide written assessments and rubrics for students K-5 at the end of each semester.

Summative. We will assess each student's academics in formative and summative ways. SMCS will use a variety of assessments typical to the public schools. iMSSA tests will be used 1st-8th grade,

three times a year as our interim testing. This will allow the School Board to assess a child's progress by a similar measure, all the way through the grades. We will conduct MSSA tests each spring for 3rd-8th graders, and the ASR in the 5th and the 8th grade. WIDA ACCESS testing will be given as part of our ELL and special education programs.

Social/Emotional Well-being

Formative. Because teachers strive towards a “whole classroom” approach (see Section II. F. (1) Whole Class Teaching) whenever possible, they are constantly observing and guiding social interaction. The Waldorf classroom intends to imitate the local community, where people of different backgrounds and abilities work together. A teacher's “holding” of the classroom facilitates this process and gives students confidence in group work. In addition to the whole classroom, looping is a great benefit to a teacher's ability to monitor not only student's academics but also their social development. A second grade teacher will learn her students' tendencies and challenges one time over four years, rather than starting fresh each year. Instead, she begins to see her students' challenges as part of a larger developmental unfolding of each child. The same occurs for the adolescent from 6th-8th grade with their homeroom teacher.

Specialty teachers, specifically the movement and the music teacher, offer formative assessments or social and emotional learning with every class they conduct because they are always conducting group efforts, whether in a game or an orchestra piece. In both classes, social collaboration is essential. What's more, these teachers stay with the students even longer than any one lead teacher, giving them the longest developmental view of any single child.

Summative. We will use Panorama Education's Social and Emotional Learning Student Survey at enrollment, to reflect back on their last year's school experience. Initial surveys in September will be taken to provide us with a comparison. Then, again in May, at the school's end-of-year. The following Panorama Education's SEL Surveys will be given to measure social and emotional health of students:

1. **Sense of belonging:** How much students feel that they are valued members of the school community.
2. **Positive feelings:** How frequently students feel positive emotions.
3. **School Climate:** Perceptions of the overall social and learning climate of the school.

Student attendance will also be monitored and evaluated as a data of students social and emotional well-being at school. Happy students want to come to school.

Will

In this document, the development of the will, or hands of “head, heart, and hands”, is seen in students' physical strength and coordination, as well as their focus, motivation, and self-control. Will allows us to work hard, push through challenges, and feel confident in our bodies as a tool for achieving our goals. Waldorf develops the will in many ways, mentally and physically, such as including the use of rhythm, regularly assigned chores and physical tasks, and work that strengthens the hands, beginning with modeling beeswax in kindergarten, to clay, to woodwork, and eventually metal working in the high school.

Formative. Teacher's formatively assess a child's will by continually requiring them to apply themselves to tasks at hand. Aided by rhythm, students are asked to focus and concentrate on tasks (the “in-breath” described in Section II.A.(3) The Use of Rhythm) and then they are given an “out-breath” of guided movement or free play. These periods of concentration required by the teacher increase with age (although teachers are aware of how different students require different

durations of rhythmic focus and freedom). The will of all students, but particularly of those with attention deficit disorders, benefit immensely by using this focus time by working their hands. Here, the handwork and woodwork teachers become the masters of will development. One cannot knit without repetition and one cannot form wood without concentration and connection to one's body. The required completion of handwork and woodwork projects (half of 7th grade and all of 8th grade woodwork is dedicated to the creation of a marionette) gives the greatest formative test of a child's will.

Teachers continually evaluate the will by comparing a student's concentration in high-demanding focus requirements (seated academic work) through the rhythm of a main lesson, before and after recess or a handwork or woodwork class, on a Monday coming from home rhythms versus in the middle of the week.

Summative. The following Panorama Education's SEL Surveys will be given to measure the resilience and hardiness, or will forces, of students:

1. **Self-management:** How well students manage their emotions, thoughts, and behaviors in different situations.
2. **Self-efficacy:** How much students believe they can succeed in achieving academic outcomes.
3. **Grit:** How well students are able to persevere through setbacks to achieve important long-term goals (not limited to academics), taking into account their experiences and identities.

Measurable

Academic

As is described before and backed by research (see Section II, A. (3) Different Trajectory of Testing Excellence Explained), Waldorf's developmental approach results in, overall, higher than average testing scores on national tests. However, it follows a different data trajectory than other public schools. Waldorf-inspired charter schools show that above average results in standardized testing begin to occur in 5th grade in reading, and in 7th grade in math. By 8th grade, Waldorf students are almost 20 points ahead in reading and 15 points ahead in math public school counterparts. Comparatively, students are at the same grade level in reading in grade 4 and in math in grade 6. Because the developmental method does not accelerate a child's intellect before it is naturally ready to do so, standardized testing scores in the public Waldorf schools tested below average in reading in 3rd grade and below, and in math in 5th grade and below. (Twenty Years and Counting, 2021).

Figure 15 - Standardized tests score comparisons in the CA Waldorf-inspired public schools and other public schools of the same district (Twenty Years and Counting, 2012).

California Waldorf Schools vs Matched Comparison Schools - 2009

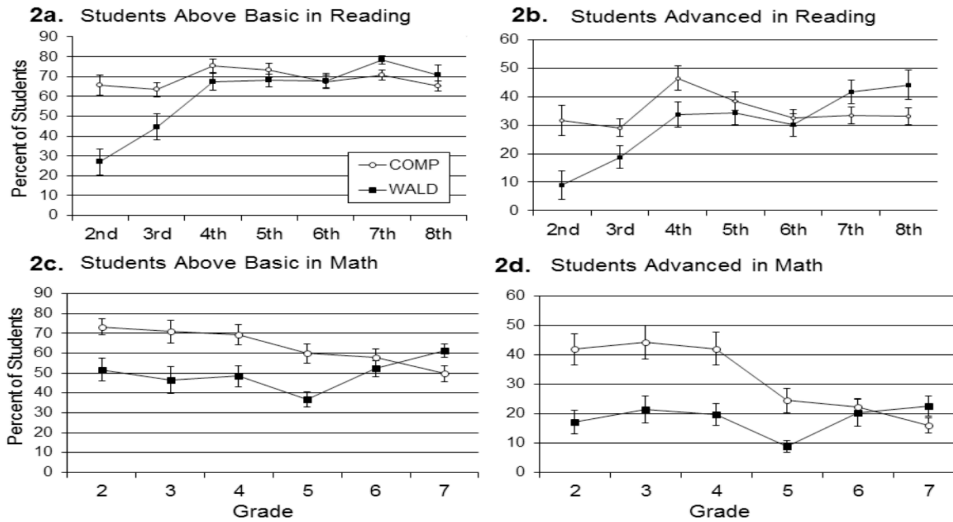


Figure 2. Waldorf school scores compared to comparison schools matched for SES. Scores are presented as those students performing at or above the proficient level (2a., 2c) and those performing at the advanced level (2b, 2d). Waldorf students performed more poorly in early grades, but these differences were no longer present in the upper grades. (Error bars = SEM).

Social/Emotional Well-being and Will

Both Social and emotional well-being and will can be formatively measured with Panorama Education’s SEL Surveys and through tracking student attendance. Here are the goal outcomes of the Panorama Surveys:

- Year one: 70% of students respond favorably (as a 4 or 5 in a 1-5 rubrics) in the six emotional well-being benchmarks selected to measure emotional well-being and resilience.
- After 2 years 75% respond favorably on the same questions.
- After 3 years: 80-85% of students respond favorably (as a 4 or 5 in a 1-5 rubrics) in the six emotional well-being benchmarks selected to measure emotional well-being and resilience.

Furthermore, SMCS believes that the success of teaching to both the social and emotional well being of a child and to their will through the Waldorf method will show dramatically in school attendance. A statewide attendance dashboard from the Public Education Department indicates Santa Fe Public Schools 2022-2023 chronic absentee rate is nearly 30%. SMCS aims to maintain a truancy rate in students that is half (25%) of that of public schools by its 3rd year.

Students by Tier

- Tier 1: Students who have missed less than 5% of classes for any reason.
- Tier 2: Students who are missing 5% or more but less than 10% of classes or school days for any reason.
- Tier 3: Students who are considered chronically absent and missing 10% or more but less than 20% of classes or school days for any reason.
- Tier 4: Students who are considered excessively absent and missing 20% or more of classes or school days for any reason.

Figure 16 - Absentee Goals for the First Three years of Sun Mountain Community School

Absentee Rating	State Average, 22-23	SMCS Year One	SMCS Year Two	SMCS Year Three
Tier one	54%	50%	45%	40%
Tier two	16%	12%	9%	8%
Tier three	16%	12%	9%	8%
Tier four	14%	10%	8%	7%

Figure 17 - Projected Measurements of Panorama’s Education SEL Surveys

	Assessment of Previous School	1 Year at SMCS	2 Years at SMCS	3 Years at SMCS
Exceeds Standards	Given to create a control, only for students transferring from another school.	76% or more of students respond favorably to survey items.	81% or more of students respond favorably to survey items.	86% or more of students respond favorably to survey items.
Meets Standards	Given to create a control, only for students transferring from another school.	70-75% of students respond favorably to survey items.	75-80% of students respond favorably to survey items.	80-85% of students respond favorably to survey items.
Does Not Meet Standards	Given to create a control, only for students transferring from another school.	Less than 70% of students respond favorably to survey items.	Less than 75% of students respond favorably to survey items.	Less than 80% of students respond favorably to survey items.

Attainable

We believe our system of assessment will be effective because:

- We create clear goals.
- We incorporate formative assessments throughout daily/weekly work.
- Formative assessment is designed to come from teachers as well as other students.
- Feedback is frequent and ongoing, reflective and reciprocal between educators, students and parents.
- Educators will provide descriptive feedback to students and families during parent conferences, where the student work will be reviewed, as well as narrative or numbered report cards.
- Teachers will be trained in standardized tests so they can administer them well and can lower students' obstacles with them before they take them.

For attendance, SMCS believes our educational program, looping teachers, extended work with parents, integrated subject matter, and arts-and-outdoors integrated learning will all make our attendance goals attainable.

Rigorous

In academics, Sun Mountain Community School commits to a thoughtful and thorough educational program with inquiry-based and student-centered incentives. Although our educational program timing may vary slightly, we aim to graduate 8th graders who score above average New Mexico testing scores on standardized tests. The projects we present throughout the educational program, both academic, artistic, and physical, demand striving and the ability to overcome challenges.

Time Bound with Targeted Dates

Our scope and sequence will lay out time bound target dates for each core curriculum standard. Consistent iMSSA testing will give feedback to teachers how appropriately they are meeting those milestones. Please see our calendar of testing in Section II. H. (1)

School Board Monitoring

Part of the School Board’s duties, stated in Section II.A.(1), is to analyze students’ assessments. This is done with the purpose of verifying that students are getting the academic skills we have promised them and to identify and to make plans to improve areas where our school has fallen short. To align ourselves with the mission of our school, the School Board will review and analyze the assessments done across the Head, Heart, and Hands standards. These analyzes will get reported back to the administration, the Equity Council, and the teachers.

GOAL #2 - EDUCATING THE “WHOLE COMMUNITY”

Alignment to Our Mission

Our second aim is to educate the “whole community”. This means both that our education of the child extends to parental relationship and education and community involvement and integration, and that our student population closely reflects the demographics of our community.

SMCS is proposing to provide support to parents and the community through parent education, community workshops and speakers, and seasonal community festivals, which provide opportunities to volunteer and connect with the greater community.

Beyond educating the students in our classrooms, SMCS recognizes the need for a school to be a gathering place at the center of the community. As SMCS looks to minimize the gap of school success across all communities, SMCS is committed to offering the greater Santa Fe community frequent opportunities for education and engagement. As a school utilizing the pedagogical principles of Rudolf Steiner, SMCS has access to over 100 years of educational resources to support parents.

SMART Approach

Parent Education

The SMCS Founding Team believes that in order to fulfill our mission, a commitment to provide parent education, community workshops and speakers, volunteer opportunities, and seasonal community festivals is critical. Research supports the need for parent involvement in school communities: a 2019 American Psychological Association review of 488 independent studies on parent involvement in their child’s education showed a clear correlation between their involvement and improved student academic performance, engagement, and motivation.

While involvement, in and of itself, is beneficial, the SMCS parent education program will support the diverse needs of our parent community.

Quarterly parent evenings will be held by each class teacher, with the purpose of cultivating a deeper relationship between the parents and teachers, and will cover the following topics:

- a) Information and resources for supporting children in their current development
- b) An overview of the topics and curriculum covered in the classroom and explorations as to how these topics and this curriculum support age-appropriate child development
- c) Opportunities for parents to get involved and engaged
- d) Dates of upcoming events

Teachers are held accountable for scheduling and implementing these quarterly meetings, and SMCS will provide childcare for students and siblings in an effort to make accessibility to these meetings as easy as possible. The Pedagogical Director will guide and support the teachers to make these meetings useful and successful.

The spacing of these four parent evenings per year allow time between meetings for teachers to prepare and gather materials to share. It may, however, be an ambitious goal for parents to find time to attend given their own busy schedules.

SMCS is committed to providing quarterly parent evenings in the first year of operation, as we are deeply committed to building lasting and trusting relationships between our community and our teachers.

Community Workshops and Speakers

Below is a proposed calendar for the community offerings that would be offered throughout the first three years. In an effort to make these events as accessible to our community as possible, SMCS will offer discounted child care to parent attendees.

In the 40 years that the Santa Fe Waldorf School was open, examples of the workshops offered were: woodworking, watercolor painting, gardening, and plant-dyeing, to name a few. Past speakers traveled to Santa Fe from throughout the United States to speak on topics such as: impact of media use in children, Waldorf educational methodology, global experiences, inspirational biographies, and philanthropic efforts.

To prioritize relevance, SMCS is committed to 50% of each annual parent educational speakers being on topics relating to the Waldorf developmental model, while the other 50% will explore contemporary topics that are currently facing families: i.e. understanding and working with AI in education, gender identity and understanding how racism and financial inequity are at play in the local community, and media literacy.

The below progression is attainable based on the existing community around Waldorf education in Santa Fe, and the continuing growth of Public Waldorf education in the neighboring states of Arizona and Colorado, which grants SMCS access to experienced Waldorf professionals, while also demonstrating a commitment to rigor, as it takes time and effort to schedule and coordinate multiple speakers throughout the year.

Years 1, 2, and 3:

- One workshops will be offered on a weekend, to allow for maximum community attendance

- Two speakers who are experienced experts in Waldorf education will be scheduled on weeknights during the school year

By year 3 of operation and thereafter, we will reassess the schedule of workshops and speakers that we are committed to offering the Santa Fe community.

Scheduling community workshops and speakers will be the responsibility of the Head of School or Administrative designee, who will coordinate with SMCS Leadership to ensure that the topics of the community offerings align with the mission and vision of the school.

Seasonal Festivals

Seasonal festivals are at the core of Waldorf school communities. They serve to bring the community together, as well as mark the passage of the year. Students in the school are involved in the seasonal festivals – through music, artwork, recitation, performance, or in a leadership capacity in the older grades. However, parent and community involvement through volunteering and other participation opportunities is central to the success and vitality of the festivals.

SMCS is committed to offering the following four seasonal festivals for the first three years of operation:

Harvest Festival - This festival occurs in the early fall and welcomes all families to the campus for a community feast and possibly a pageant, followed by an afternoon of games and activities led by the faculty and older students.

All-Hallow's Eve - This festival occurs right around Halloween, and is open to the entire Santa Fe community. Parents, teachers, and older students put together a beautifully curated series of skits and tableaux that wind through the campus, and then families and children get to walk through and experience the magic of the evening.

Winter Faire - This festival occurs on a weekend in December and is open to the entire Santa Fe community. Parents and community members work together to offer a series of activities for the children, including crafts, ornament making, beeswax candle dipping. Additionally, there is a holiday market, where community members can set up booths to sell items of their own making.

May Faire - This festival occurs at the beginning of May, and celebrates the coming spring with maypole dances and live music, followed by a community meal and games.

These four festivals already have documented guidelines and processes on hand for efficient planning and execution. Additionally, for the past 40 years, the Santa Fe community has enjoyed these seasonal festivals at the Santa Fe Waldorf School meaning that bringing these festivals back to the community will be a welcome reintroduction for the greater community.

Our multifaceted approach to educating and cultivating our community through parent education, offering workshops and speakers, and seasonal festivals is reflective of our deep commitment to creating a community where parents, students, teachers, staff, and the greater Santa Fe community feel at home.

Measures and Metrics

The successful achievement of Goal #2 will be measured in the following ways:

- Parent Education:
 - Verification of the scheduling and completion of parent evenings will take place each semester, under the oversight of the Head of School or Administrative designee.

- All attending parents will be sent a brief survey after the second and fourth parent evenings of the year to measure the effectiveness of these meetings in supporting our educational and community goals. The results of these surveys will be sent to the Pedagogical Director, who will review the results and then follow up with the class teacher and offer support.
- Community Workshops and Speakers:
 - Verification of the scheduling and execution of the three-year progression of community workshops and speakers will fall to the Head of School or Outreach Administrative designee, who is responsible for the scheduling execution of these events.
 - Following each event, attendees will be asked to complete a brief survey to gauge the interest and effectiveness of the workshop or speaker. The Head of School or Outreach Administrative designee will receive the results of these surveys, and will use the collected information to inform future selection of topics and speakers.
- Seasonal Festivals:
 - Verification of the scheduling and execution of the four seasonal festivals will fall to the Head of School or Administrative designee. The four festivals will be scheduled as a part of the greater school calendar, meaning that planning for them can start even before the school year begins.
 - Following each festival, a community survey will be available so that attendees have the opportunity to give comments and make suggestions. Results from the festival surveys will go to the committee for each festival – a group that is made up of teachers and staff volunteers.

School Board Monitoring Assurance

Goal #2 will be bi-annually assessed by the School Board. This assessment will require a special report from the Head of School or Outreach Administrative designee. Once a semester, the Head of School or Outreach Administrative designee will meet with the Equity Council with the express purpose of reviewing how the execution of Goal #2 aligns with our Mission and Equity Plan.

References for this section:

https://www.wilder.org/sites/default/files/imports/LitReviewSummary_10-16.pdf

C. Curriculum, Educational Program, Student Performance Standards

C. Provide a description of the proposed school’s curriculum. The proposed curriculum must be research-based, reasonable, and clearly align with New Mexico Common Core State Standards and the proposed school’s mission. (NMSA 22-8B-A(C))

The Sun Mountain Community School (SMCS) is a community of families and educators dedicated to cultivating the intellectual, social, emotional, physical and consciousness capacities of the developing human being. Our mission is to educate the whole child, using an age-appropriate approach to content and skills based on principles of Waldorf Education and the work of Rudolf Steiner. Our students engage in rigorous academics, develop connections to the natural world and moral discernment, and achieve an appreciation of themselves and others.

WALDORF EDUCATIONAL PROGRAM

- Alignment with the proposed school’s mission
- Yearly Interdisciplinary Program Themes
- Waldorf Kindergarten Educational Program
- Waldorf Language Arts Educational Program
- Math Educational Program
- Waldorf Science Educational Program
- Specialty Subjects Educational Program

NEW MEXICO CONTENT STANDARDS PLACEMENT TABLES

- New Mexico Kindergarten Standards
- New Mexico Social Studies Standards
- New Mexico Language Arts Standard - Required LETRS training

CORE CURRICULUM STANDARD PLACEMENT TABLES

- K-8 English Language Arts and Mathematics - Alliance
- Science

RESEARCH BASED EVIDENCE SUPPORTING WALDORF METHODS

- Language Arts
- Math
- Nature Studies/The Sciences
- Geography Curriculum
- Movement Education
- Performing and Visual Arts
- Music Program
- World Languages Program
- Handwork Program
- Woodworking Program
- Outdoor Program

WALDORF EDUCATIONAL PROGRAM

Alignment to Mission

The educational program presented here aligns with the school’s mission of cultivating the intellectual, social, emotional, physical and human consciousness capacities of the developing individual. The program content is taken from many years of Waldorf curriculum development which builds on the knowledge and alignment of the developmental method. The Founding Teams has taken great care to adapt the curriculum to legislated standards when necessary and assure that all core curriculum standards, both national and New Mexico specific, are included in the program, even if the age doesn’t align directly with a standard public school. The integrated subject matter, described in detail below, shows the manner and the research based benefits of teaching to the whole child, the

head, heart, and hands. Our comprehensive and holistic education throughout the grades keep children engaged and challenged, and our constant efforts to connect children to the natural world and to their community helps keep them grounded emotionally and socially.

Interdisciplinary Program Themes and Summary, K-8th grade

See Attachment 2 - SMCS Interdisciplinary Program Themes and Summary, K-8th grade

Waldorf-inspired Kindergarten Educational Program

This document contains the Waldorf-inspired kindergarten pedagogy, methodology, its correspondence to the Aligned New Mexico Kindergarten Standards by Domain and Critical Indicators, and supporting research.

See Attachment 3 - Waldorf-inspired Kindergarten Educational Program

Waldorf Language Arts Educational Program

The SMCS will provide training during in-service for all lead teachers in year K-8 in our literacy curriculum, Roadmap to Literacy (1-3) or Continuing the Roadmap to Literacy (4-8). Each classroom will have their own copy of the text and each teacher will be encouraged to become familiar with the content over the summer. Lead teachers will use this curriculum, along with the LETRS training that will begin in January of first year, to teach reading and spelling. The content through which this program will come we call our Language Arts Educational Program.

See Attachment 4 - SMCS Language Arts Educational Program 1st-8th

Math Educational Program

The SMCS will use Jamie York's math curriculum, grades 1-8. Each classroom will have a copy of the curriculum book in their classroom. Grades 6th-8th will have a workbook purchased for each student each year. The pedagogical director will provide training in the curriculum in in-service training each year. (See Attachment 5 - SMCS Math Education Program 1st-8th)

See Attachment 5 - Math Education Program 1st - 8th

Science Educational Program

See Attachment 6 - SMCS Nature Studies & Science Educational Program

See Attachment 7 - Organization of Science Blocks, 5th-8th Grade

Specialty Subjects Educational Program

See Attachment 8 - Specialty Subjects Educational Programs

See Attachment 9 - Outdoor education scope and sequence, 1st-8th

NEW MEXICO CONTENT STANDARDS PLACEMENT CHARTS

- **See Attachment 10 - New Mexico Aligned Kindergarten Core Standards Placement Chart**
- **See Attachment 11 - New Mexico Social Studies Standards Placement Chart**
- New Mexico Language Arts Standards. SMCS will adhere to the state mandate that all kindergarten through second grade teachers will take LETRS' coursework until their training is complete.

CORE CURRICULUM STANDARD PLACEMENT TABLES

Introduction

SMCS will ensure an overall co-alignment of Common Core State Standards (CCSS) with an approach guided by the principles of a Public Waldorf Education for students in order to meet the requirements of state-mandated standardized testing. The Public Waldorf educational program determines that some state standards will be addressed at different grade levels from those stated in the CCSS. It is SMCS's goal for students to exceed statewide performance standards by the end of grade 5 in Language arts and of grade 6 in Math, followed then by a steady increase over the next few years when students exceed state standards. Students will also demonstrate above average competency in state grade-level content and performance standards and progress on the State Testing Program from fourth grade and beyond in Language Arts, with increasing comparative success acceleration in advancing years, and in Math from 5th grade and beyond with increasing comparative success acceleration in advancing years.

The Sun Mountain Community School will work closely with the Alliance for Public Waldorf Education through membership, monthly meetings, and summer training to help our school both exceed state averages in standardized testing and remain true to Waldorf core principles and practices.

Parents will be informed when the delivery of the SMCS approach differs in sequence from traditional schools, so that they may make well-informed decisions on the enrollment of their children. Parents will learn about the benefits of remaining in the school throughout the grades and long-term commitment to the school will be sought to achieve optimal student learning and success. We believe grade-level standards will be targeted to a sufficient degree (and even higher in some cases) to support transient students should they move to other schools throughout New Mexico to continue their grade-level education. We believe with direct, upfront, and continued communication with parents/guardians about our program and where grade-level standards are met, they will be able to make informed decisions about their desire to enroll their student and the potential change in approach that would occur should there be a move to another school. Certainly, this is a common challenge among families who seek different forms of education over the course of their child(ren)'s education and SMCS will make every effort to facilitate smooth transitions should they occur. Our goal continues to be one that is a developmentally appropriate, consistent, framework that carefully considers CCSS and how it maps onto the Public Waldorf curriculum.

Common Core Standard Placement Tables in Language Arts and Math

See Attachment 12 - Public Waldorf Common Core Placement Tables

Science

See Attachment 13 - Science Core Curriculum Placement Chart

RESEARCHED BASED EVIDENCE THAT SUPPORTS WALDORF METHOD

- Language Arts
- Math
- Nature Studies/The Sciences
- Geography Curriculum
- Movement Education

- Performing and Visual Arts
- Music Program
- World Languages Program
- Handwork Program
- Woodworking Program
- Outdoor Program

Language Arts

There is a solid research base supporting the importance of oral language and phonemic awareness skills in reading development (NELP, 2008). Conversely, children in the Steiner curriculum enter first grade in the year of their seventh birthday, typically spending the prior two years in Steiner kindergartens instead of state schools. In these kindergarten years, written language—be it in the form of letters, words or stories—is excluded from the kindergartens to encourage the development of oral language. Instead, children’s activities center on age-appropriate activities, such as play painting, drawing, cooking, singing or oral storytelling from the kindergarten teacher (Edwards, 2007). Therefore, reading instruction does not occur in Steiner kindergartens. However, we recognize that the kinds of language activities taking place may well develop a strong foundation for later skilled reading (Dockrell, Stuart, & King, 2010), even though they do not involve text. Our findings support the role of developing strong oral language skills, including phonemic awareness, as a foundation for reading, and these skills are today viewed as important aspects of pre-reading programs (e.g., Justice & Pullen, 2003).

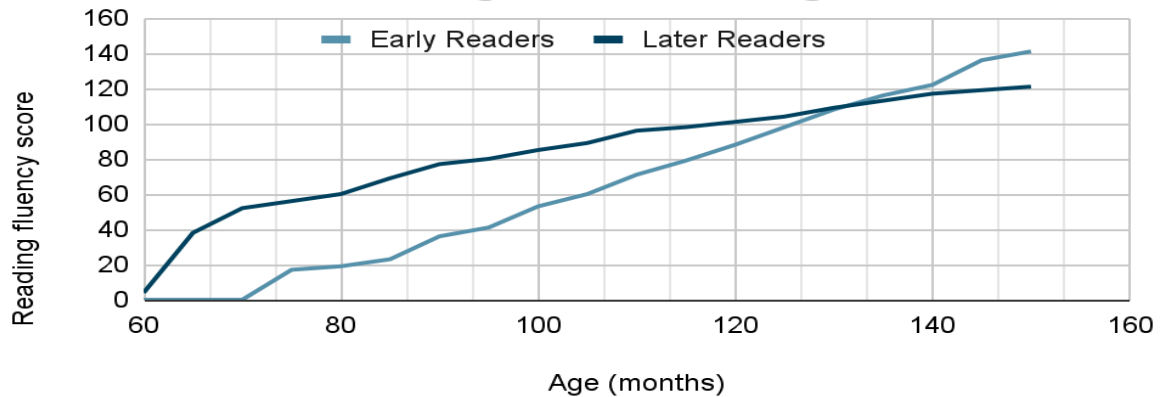
After these foundational language skills are taught, reading is taught using structured literacy and explicit instruction of decoding and encoding of the English language. This method is most universally effective, bridging effortless readers and students with dyslexia and disabilities, and English language learners (Coppola, 2003). We use Roadmap to Literacy as our curriculum in reading.

As years progress, Language Arts classes include engaging and age appropriate reading material that enhances main lesson topic study. Teachers instruct students through research techniques and how to write a research paper, scientific writing, reporting style writing, comparative essays, as well as creative writing techniques. By 8th grade, an entire block is dedicated to students writing their own short stories. Research shows that Waldorf language arts teaching method produces above average standardized tests scores in Language arts by middle school. Three separate studies support this:

- Standardized tests score comparisons in the CA Waldorf-inspired public schools and other public schools of the same district (Twenty Years and Counting, 2012),
- Estimated decoding and reading fluency trajectories as a function of chronological age and reading instruction age, data summarized from two studies taken in New Zealand (Suggate et al. 2013),
- The comparison of annual standardized (STAR) tests in grades 2 through 11 in North Bay public Waldorf schools. (Credo School of Arts, Letters, & Sciences, 2012).

Figure 18 - Estimated decoding and reading fluency trajectories as a function of chronological age and reading instruction age, data summarized from two studies taken in New Zealand (Suggate et al. 2013).

Estimated decoding and reading fluency trajectories as a function of chronological age and reading instruction age.



Math

Our students are taught math as it relates to their cognitive abilities and readiness. The cross curricular nature of our pedagogy and the creative arts integration encourages our students to think about math in new and unique ways. This allows students to enjoy math and apply it to daily life and apply it to . These skills are transferring into high school with most students excelling on testing and in math classes in middle school (Twenty Years and Counting, 2012) and in high school (Fuss, 2022).

The SCOPE study found this result occurring especially with at-risk youth, “with the most gains among African American, Latino, economically disadvantaged students and other traditionally underserved students.” The average added value associated with Alice Birney Waldorf ranged from 0.19 to 0.24 standard units in English language arts and from 0.05 to 0.09 standard units in mathematics. The researchers found that in Waldorf education math is taught in multiple ways. Students move their math, sing their math, paint, draw and build their math, and it is brought into other lessons like history (SCOPE, 2015). This way of teaching is more engaging and enjoyable for all students.

Nature Studies/The Sciences

The whole structure of the Steiner-Waldorf approach is profoundly ecological and leads to a wonder and curiosity for the natural world and the laws that govern it.

In 1st-3rd grade, students spend two classes a week in “Nature Studies”. In these classes students hike, explore, and build forts and dams. In this way, they are building their relationships with the natural world, developing curiosity for natural order, and having first-hand experiences with natural laws. One can consider this stage as a three-year period of “active experimentation”, “concrete experience” and “reflective observation” before “abstract conceptualization” comes into play. A focus of third grade is farming and students spend lots of time in the garden throughout the year.

Fourth grade studies zoology which includes a project-based learning research project of the animal of the student’s choice.

Fifth graders study Botany which incorporates interdisciplinary study with handwork where students collect plant parts and dye wool from their forage in different colors, as well as basket weaving.

In 6th-8th grade, students have 3 science blocks a year, as described in the curriculum scope and sequence. See Attachment 7 for a graph of middle school science blocks. These classes, which cover geology, physics, anatomy, chemistry, all build on the cultivated interest in the natural world and observation skills needed to have an objective view needed in advanced scientific experiments. The emphasis is on the phenomena as they can be experienced (through direct observation or the description of the teacher) rather than on the theories that may be current in contemporary science. (Rawson, 2019)

Geography Curriculum

“The child shows a motivation and striving to go out over the environment, to form a unique world image as a part of achieving a singular identity. This is part of humankind's yearning and capacity for individualisation. Every child must integrate a world image with a corporal awareness, in order to know where she is and who she is.” (Brierly, 1998).

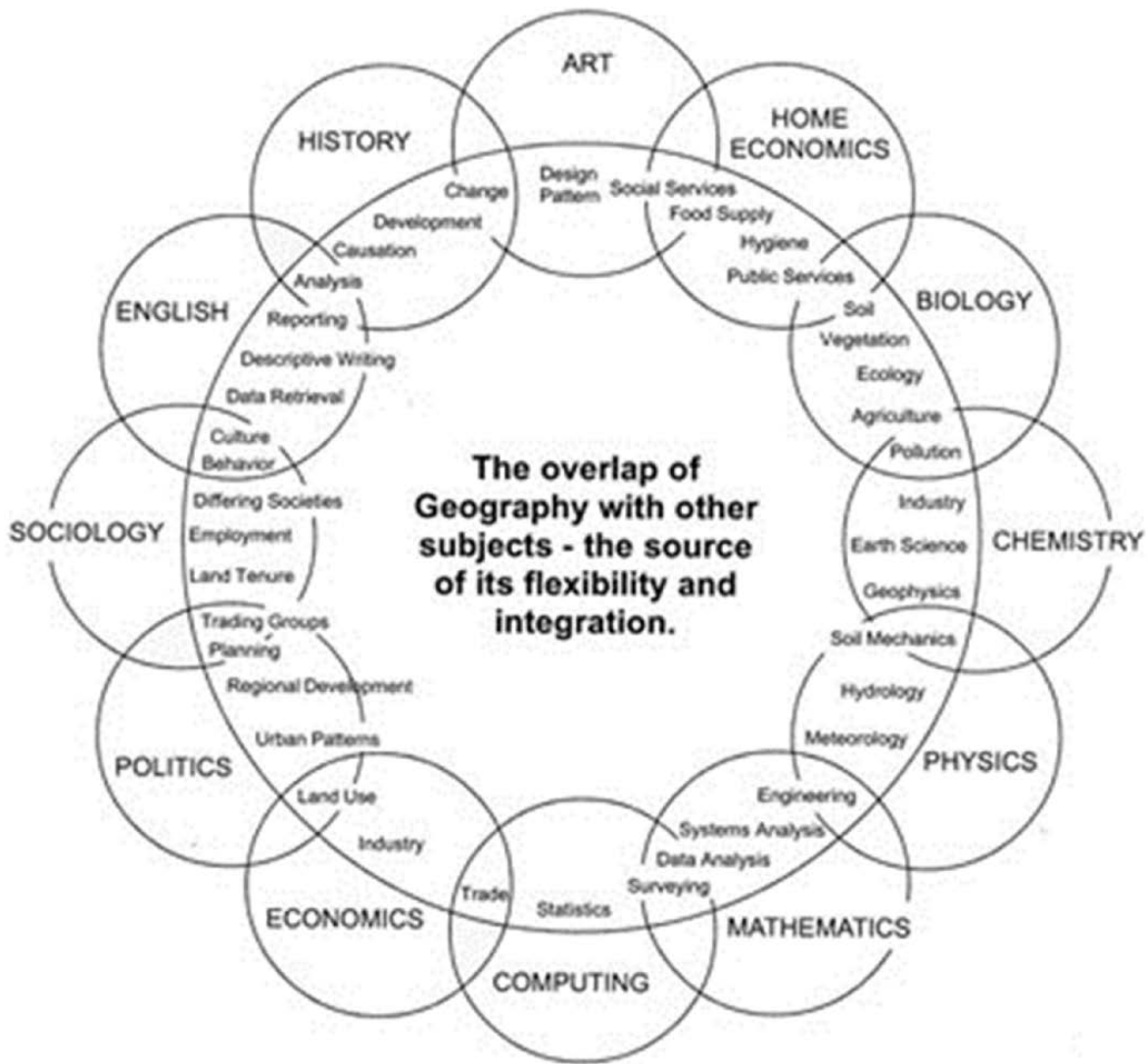
In early elementary years, geography is learned by studying “local geography”, i.e. the land of the campus and surrounding area. Starting in fourth grade, students have a geography block each year, moving through the inhabited continents. Fourth graders study a block of “local geography” which encompasses Santa Fe and New Mexico history and geography; this is revisited in 7th and 8th grade in greater depth. The geography of modern countries and capitals (particularly, Europe and Asia) are integrated into their respective history blocks. By the time a SMCS student graduates the 8th grade, they have learned about all the countries of the world and have studied each inhabited continent to build a global perspective. Then, as more complex historical events develop and a world view takes place, there is a foundation for understanding the interchange of cultures.

In a typical geography block, students first learn about the major geographical features and biomes of a continent. They then learn about first peoples and how they evolved within their geographical region, and then they learn about the great empires of the continent. Students draw maps of continents using a grid system.

Traditionally, geography blocks offer opportunities for project-based learning. Researchers Lu Zhang and Yan Ma have found that compared with the traditional teaching model, project-based learning significantly improved students’ learning outcomes and positively contributed to academic achievement, affective attitudes, and thinking skills, especially academic achievement.” (Zhang & Ma, 2023). A research project is assigned to a particular geographic area or country of that continent of the student’s choice. Oral reports are presented on the countries and culture in their area of research. These presentations offer interesting insights on the diverse geography and culture of a continent. Speakers, particularly if they are a member of the class community, are invited who have personal experience with a world continent due to birth, family, or travel.

Geography is inherently interdisciplinary and when taught as that as is done in the Waldorf pedagogy, is engaging to all of the 8 types of intelligence, and offers many points of entry into broadening world views.

Figure 19 - The overlap of geography with other subjects (Tanyanyiwa, 2015).



As will be seen in section I.D. Multicultural/Bilingual Education Act geography blocks are an important part of our “decolonized” approach to curriculum. The following is presented in both sections:

Decolonization

Through continental geography classes and historical blocks, cultures are presented with the intention to “decolonize”. This means that each continent and its people are studied in their indigenous forms before humans started massive colonization efforts. North and South American peoples, mythologies, empires, alliances, trading powers and routes, and academic studies are studied before the Age of Exploration. The African continent, its peoples, mythologies, empires, alliances, trading powers and routes, and intellectual and artistic interests are studied by students before learning about European and African slave trades. This does two things: it gives all cultures their own historical timeline so historical representation isn’t confused with the timeline of European history; and it builds interest and a natural empathy for each culture’s triumphs and failures before they learn of the impact of being overcome by another culture.

Movement Education

In SMCS, children and young adults will have the opportunity to develop proficiencies in various types of movement activities. Physical education supports the experiential learning process as it relieves

stress, opens neurological pathways, builds strength and discipline, improves self-esteem, and enhances collaboration and relationship skills. The program encompasses both curricular classes, which include games from around the world, sports, dance, track, and field, tumbling, Spatial Dynamics, and an after-school program that supports the curriculum.

Having control over one's bodily movements is a type of Bodily-Kinesthetic Intelligence. For instance, dance, according to anthropologists, has been found to "reflect and validate social organization" (Gardner, Howard, 2002; Gardner, 2024). Having a strong movement vocabulary requires an ability to determine the "speed, direction, distance, intensity, spatial relations, and force" of movement. Furthermore, fine motor control, and a keen sense of balance is related to Bodily-Kinesthetic Intelligence. We believe SMCS's program will support students in reaching their full Bodily-Kinesthetic Intelligence by engaging in thoughtful games and movement led by experts such as those trained in Spatial Dynamics and/or Eurythmy (so long as budget allows, Eurythmy will be offered), which is considered speech through movement and involves a pianist accompaniment and props such as copper rods and copper balls. During classes, students strengthen balance, gross and fine motor development, as well as other skills to increase their strength, coordination, sportsmanship, flexibility, and timing. Through exposure to a wide variety of physical activities, students develop healthful habits that last a lifetime.

Performing and Visual Arts

As expressed in our Uniqueness #1 - Arts Integration, students process all new academic concepts, including math and the sciences, through artistic renderings in their Main Lesson Book. In addition to Main Lesson, however, the visual arts expand to specified arts classes (detailed below in the Attachment 8 about specialty classes details), and in world language class. Furthermore, each year in a 3-4 week block, students prepare and perform a class play, typically complementing that year's curriculum. All students take part, cultivating a soul experience with the curricular material, self-confidence in their speech and movement through coaching, and interpersonal skills required to put on a class production.

In a 2019 study, Dr. Daniel Bowen and Dr. Brian Kisida noted a positive correlation in art education opportunities with lower disciplinary infractions and increased writing scores on standardized tests. Here is their research:

"Over the last few decades, the proportion of students receiving arts education has shrunk drastically. This trend is primarily attributable to the expansion of standardized-test-based accountability, which has pressured schools to focus resources on tested subjects. These pressures have disproportionately affected access to the arts in a negative way for students from historically underserved communities." (Bowen & Kisida, 2019). Since the steady decline since the 1980s, "white students have experienced virtually no change, whereas African-American students have experienced reductions of 49 percent and Hispanic/Latinx students by 40 percent. Moreover, children whose parents have less than a high school education have experienced a 77 percent decline (Rabkin & Hedberg, 2011).

"We conducted a randomized controlled trial with 10,548 3rd-8th grade students who were enrolled in 42 schools that were assigned by lottery to receive substantial influxes of arts education experiences provided through school-community partnerships with local arts organizations, cultural institutions, and teaching-artists. We find that these increases in arts educational experiences significantly reduce the proportion of students receiving disciplinary infractions by 3.6 percentage points, improve STAAR writing achievement by 0.13 of a

standard deviation, and increase students' compassion for others by 0.08 of a standard deviation. For students in elementary schools, which comprise 86 percent of the sample, we find that these arts educational experiences also significantly improve school engagement, college aspirations, and arts-facilitated empathy. These findings provide strong evidence that arts educational experiences can produce significant positive impacts on student academic and social development. Policymakers should consider these multifaceted educational benefits when assessing the role and value of the arts in K-12 schools." (Rabkin & Hedberg, 2011).

Theater arts are a part of the yearly curriculum for all grades. Each class performs a significant play that complements some aspect of the curriculum each year, with lighting, sets and costumes. It is common to see plays about Aesop's Fables in second grade, the Old Testament in third grade, Norse myths in fourth grade, the Greeks and Romans in fifth and sixth grades, Shakespeare in seventh grade, and a modern play in eighth grade. In high school, ninth graders study the history of drama, eleventh graders write and perform their own monologues, and tenth and twelfth graders perform class plays.

Music Program

According to the developmental methods behind the Waldorf curriculum, up until about the age of nine, children align more with a sense of wholeness, as being an extension of their environment, than as individuals who have a singular place in the environment. Because of this, up until about nine, Waldorf's approach to music is to use the D-pentatonic mode ("the mood of the fifth") in songs and in flute playing. In this mood, the phenomena of melody, harmony, and rhythm weave together. There are no "wrong notes" to hit. Likewise, there are no harmonic chords or keynotes. These more sophisticated elements are brought into the music curriculum after the "nine year change" when most children first get an experience of separation of self from the world. Also, students begin singing and creating rhythm in rounds. Students learn a C major scale on diatonic flutes (C flutes). Music symbols are introduced. By fourth grade, students learn to sight-read simple melodies. Stringed instruments are chosen and students begin orchestra class, in addition to singing in classes on a daily basis. In grade 5, students can begin exploring harmonies and orchestra classes continue. In middle school, students participate in orchestra classes once or twice a week, as well as chorus classes where multiple parts are sung. Physics of sound are explored in science blocks adding the intellectual joy of making music (Avison & Rawson. 2014. P219).

In response to the plethora of studies done on the impact of COVID isolation on children's mental health, most notably (Loades et al., 2020; Luo et al., 2020) showing the increase in mental health issues, Jian Sun from the School of Music and Dance conducted his own research. He wanted to explore the impact of music education on the psychological and academic outcomes of students and found:

"Results reveal that music education has a significant positive impact on psychological well being, which improves students' academic performance... This study suggests that the policymakers and practitioners should make such policies that encourage educational institutes to adopt music education to improve the psychological wellbeing of students."
(Sun, 2022)

This research confirms a pre-pandemic 5-year study at the USC Thornton School of Music. The researchers provide evidence of the benefits of music education at a time when many schools around the nation have either eliminated or reduced music and arts programs. The study shows the study of music speeds up the maturation of the auditory pathway in the brain and increases its efficiency. Music instruction appears to accelerate brain development in young children, particularly in the areas

of the brain responsible for processing sound, language development, speech perception and reading skills, according to initial results of a five-year study by USC neuroscientists (Miendlarzewska EA, Trost, 2014).

Within two years of the study, the neuroscientists found the auditory systems of children in the music program were maturing faster in them than in the other children. The fine-tuning of their auditory pathway could accelerate their development of language and reading, as well as other abilities – a potential effect which the scientists are continuing to study. The benefits appear to extend beyond a surge in neural connections in their brains. It actually boosts their wellbeing. The results are especially meaningful amid a nationwide mental health crisis.

World Language Curriculum

The aim of world language teaching in Waldorf-inspired schools is to encourage a positive attitude toward people of other cultures and languages. Students gain a respect for other cultures. Immersion into world languages also offers the learner a new perspective on their own language, culture, attitudes, and mentality. In this way, students become adept at shifting and exploring different perspectives and gaining empathy for others, as a natural state as they move through the world.

“Initial contact with world language in school is a broad experiential and contextual one, which becomes increasingly more conscious through analysis. There is an intrinsic progression from oral to literate language and the oral element remains paramount. In building literacy on orality, there is a strong emphasis on the gesture and situations” (Avison & Rawson, 2014).

In the goal of creating “quiet instructions” in early Waldorf classrooms, practical American Sign Language (ASL) signs are taught and used by teachers and students. By second and third grade, students learn the ASL alphabet and are practicing their names and their spelling words in ASL. These signs can be exact “gestures” needed for a teacher to help communicate in other world languages. Language is seen as the bridge between movement and thinking.

Initial contact (the first three years) is focused on oral immersion; all or almost all instruction is in the world language. Lessons are designed to engage and guide through pantomimed activities without the need for translation of explanation. Written words are not used (Avison & Rawson, 2014).

- Verbal exchanges.
- Commands.
- Questions and answers.
- Verses
- Poems
- Counting rhymes,
- Skipping chants
- Songs
- Games
- Teacher works in repetition.
- Basic intonation patterns are more important than understanding each word that they speak.
- Whole dialogues can be learned by heart and vocabulary and grammatical structures are acquired as we acquire our first language.

Handwork and Woodwork Programs

Experiential learning, or learning through doing and making, is the foundation of the Waldorf pedagogy and handwork and woodwork is the apex of that practice. Waldorf pedagogy teaches that thinking and movement arise out of activity and movement. Handwork and woodwork classes teach students to be “makers” in their world. Handwork lessons, given between kindergarten and 8th grade, and woodworking, taught from 5th-8th grade, teach more than just dexterity and skill. Through age-appropriate, rhythmically repeated movements and exercises, handwork both strengthens the will and builds capacity for logical thinking (Avison & Rawson, 2014).

Jean Piaget, in his theory of cognitive development, stated that teaching intricate manual skills is essential for the development of intelligence. According to him, mental operations of logic (among which are: reaching conclusions, forming judgements, and comprehension) are nothing other than the result of taking actions into the mind and coordinating them there (Mitchell & Livingston, 1999).

“Making is a creative process that develops skills and competence by engaging with ideas and materials. Knowledge and understanding acquired through “learning by doing” allows young people to enjoy a sense of achievement which will sustain a life-long interest in the made world” (Eggleston, 1999).

“Creative and practical skills, developed in education, can provide valuable experiences which will support the national economy and improve the quality of everyday life.”
(Eggleston, 1999)

Projects over the years include the making of:

- Knitted bags, scarves, and stuffed animals
- Knitted socks
- Crocheted bags and hats
- Cross-stitched designs on sewn pillows
- Weaving
- Plant based dyes for dying wool
- Basket Weaving
- Leather moccasins
- Sew clothes for marionette puppets
- Wood spoons and bowls
- Wooden animal and human figurines
- Wooden carved and proportional head, limbs, torso, and hands of a marionette

Handwork develops:

- Fine motor skills
- Body-kinesthetic intelligence
- Executive functioning skills needed to follow many step projects
- Mathematical skills: counting, number-patterns, measuring in two-dimensions and in three-dimensional forms

- The will
- The practice of delayed gratification
- Neural pathways between the hemispheres of the brain
- Focus, self-confidence and pride in one's work

Outdoor Program

SEER Study Effects of Environmental Education on Student Achievement Control Group study determined that students participating in Environmental Education curriculum increased academic performance. After comparing eight paired sets of student classes, some with an integrated outdoor program, and some without. They came from different, neighboring schools with closely matched demographics and socioeconomic characteristics. Two classes were even in the same school. The authors compared standardized testing scores in reading, writing, math, science, social studies and attendance. The frequency that students with an outdoor education program did better was:

- 76% in Language Arts
- 63% in Math
- 64% in Science
- 73% in Social Studies
- 77% in attendance for taking assessments

Researchers collected data from site visits, teacher surveys, and interviews. Outdoor education students showed fewer discipline problems, increased enthusiasm for learning, and greater pride in their accomplishments (Oksana, 2003).

The evidence that outdoor education helps students with Attention Deficit Hyperactivity Disorder (ADHD) is particularly strong. The world's increasing dependence on technology simultaneously increases time indoors, sitting at desks, and focusing on tasks which have no physical outcome. Simultaneously, awareness and diagnosis of ADHD have skyrocketed. In fact, between 2003 and 2017, ADHD diagnoses in children in the United States have nearly doubled, with stimulant medication use increased by 50% (Piperetal, 2018). Despite the prevalence of medication use, there has not been an equal increase in the use of behavioral treatments. Among U.S. children receiving treatment, just under half were receiving any sort of behavioral treatment, while 62% were taking medication (Piperetal, 2018). Though medication use remains the most popular treatment, there is nonetheless some dissatisfaction among physicians and patients alike (Hodgkinsetal,2013; Padhilla,2018). In addition, the recent Adderall shortage and its consequences have highlighted the need for alternate forms of treatment (independent of medication), which have long-lasting positive impacts. One setting where children struggle is school.

In a survey of technology use in schools, 70% of surveyed teachers said that they use technology to a moderate or large extent for work normally done in classrooms, though only about a third said that it helped students to become more independent and self-directed (Grey & Lewis,2012).

These studies suggest that time spent in green space (such as fields, parks or other natural spaces where nature dominates over built structures) can aid in reducing hallmark ADHD symptoms such as impulsivity and inattention, both in short and long-term. (Kuo, 2004) found that these benefits hold regardless of age, gender, income, geographic location, and diagnosis (inattentive, hyperactive, or combined). The reduction in inattention and impulsivity symptoms have been demonstrated across

various settings and activities, such as walking, in play spaces, and during after school and weekend activities (Faber et al, 2001; Faber, et al, 2009; Faber et al, 2011; Kuo et al, 2004).

See **Attachment 8** for the full Outdoor Education handbook including scope and sequence.

Eurythmy - Eurythmy is an expressive movement conceived by Rudolf Steiner and his wife, Marie von Sivers. Eurythmy gestures relate to specific sounds and rhythms of speech, to the tones and rhythms of music and to soul experiences, such as joy and sorrow. When practiced as a class, eurythmy builds group harmony and social, as well as spatial awareness (Credo School of Arts, Letters & Sciences, 2012).

MEETING EQUITY FOR ALL UNDERSERVED POPULATIONS

Because our approach to the language arts is one of structured literacy, explicit instruction of decoding and encoding of the English language, it is inherently equitable. Teaching with a structured and multi-disciplinary approach, all learners are served because all learners are able to use this method - students with dyslexia, students with disabilities, and English language learners (Coppola, 2003).

“Structured Literacy is a blueprint for effective literacy instruction based on the Knowledge and Practice Standards for teachers of reading developed by the IDA in 2010 and updated in 2018 to better prepare educators to meet the instructional needs of students for literacy acquisition. Structured Literacy instruction can be effective for students learning English as a second language, as well as students at-risk for literacy acquisition (Baker et al., 2014; Gersten et al., 2009). Students who receive explicit, systematic literacy instruction are more likely to become biliterate (CárdenasHagan, 2011). Research supports that over 60% of students in the regular classroom need to receive literacy instruction in a Structured Literacy format (Young, 2018). Structured Literacy has shown to be effective for teaching all students how to read and write (Moats, 2019; Young, 2018).”

(International Dyslexia Association, 2018)

The Waldorf approach to math mimics our Experiential learning techniques expressed in detail in Section A. (3) Head, Heart, and Hands. Physical manipulatives and art expressions are used to help a student with a new math concept. In the early grades, movement is used a lot in math classes, i.e. stepping out math problems or jump roping to the times tables. Math areas of the brain are also stimulated in handwork and music classes. This type of integrated approach to mathematics is an equitable approach because it allows many points of entry into the subject for different types of intelligences and abilities. Finally, we teach a multi-modal curriculum (head, heart, hands) which catches different types of students.

TIMELINE & PLAN FOR ENTIRE PROPOSED CURRICULUM

The Founding Team of SMCS is excited to have an implementation year to develop a scope and sequence. This effort had gotten started in the spring of 2024 while the school was still a private

institution as there was a desire to spend time doing modernization, assuring rigor, and organization of subject matter. Now, time will support our ability to organize and update an excellent collection of existing work done by teachers of the past, supplemented by the common core curriculum standards placed throughout the appropriate lessons. Block plans, daily lesson plans, assessment rubrics, and block assessments all exist in our collective files. The work will be to make them consecutive, aligned with NM core curriculum standards, and rich with content. This will be greatly appreciated by Waldorf teachers who often recreated their own scope and sequence each summer.

Figure 20 - Timeline for creation of the entire proposed curriculum

Element of curriculum to be completed	Rough draft completed
Scope and sequence	September 2025
Block plans	September 2025
Daily lesson plans	October 2025
Project plans	September 2025
Assessment rubrics	September 2025
Block assessments	October 2025
Tract class assessments	November 2025
Unit and Course Assessments	November 2025

Figure 21 - Foundational curricular resources for academic subjects

	ELA Skills	ELA Content/Literature	Math	Science	Social Studies
1	<p>Roadmap to Literacy</p> <p>Teaching Language Arts in Waldorf</p> <p>Schools (Trostli, ed.)</p> <p>Teaching Children Handwriting (McAllan)</p>	<p>Fairy Tales From Around the World (Lang)</p> <p>The Wisdom of Fairy Tales (Meyer)</p> <p>Household Stories by the Brothers Grimm</p>	<p>Teaching Mathematics in First and Second Grades (Schuberth)</p> <p>Active Arithmetic (Anderson)</p> <p>Sourcebook for Grades 1-5 Math (Jamie York)</p>	<p>Children and Nature (Russel)</p>	<p>World Tales</p>

2	The Write Approach (Gladich, Sassi)	Aesop's Fables African Folktales (Abrahams) The King of Ireland's Son (Colum)		Children and Nature (Russel)	Ancestor Approved Intertribal Stories for Kids (Smith)
3		In the Beginning: Creation Stories from Around the World (Hamilton, Moser)	Sourcebook for Grades 1-5 Math (York) Active Arithmetic (Anderson)	The Storybook of Science (Fabre)	Wonderful Houses Around the World (Komatsu) How We Are Sheltered (Chamberlain) The Fabrics of Fairy Tales (Batt)
4	Continuing the Journey to Literacy: A Guide to Teaching Language Arts in Waldorf Schools Grades 4-8 t (Militzer-Kopperl)	Myths of the Norsemen from the Eddas and Sagas (Guerber) In the Footsteps of Crazy Horse (Marshall III)	Sourcebook for Grades 1-5 Math (York) Multicultural Mathematics (Zaslavsky)	The Human Being and the Animal World (Kovacs)	Pueblo Nations (Sando) NM History In the Sea of Life Enisled (Brierley)
5	Teaching Language Arts in Waldorf Schools (Trostli, ed.) Fire the Imagination-	My Side of the Mountain (George) Wonder (Palacio) Esperanza Rising (Ryan)	Sourcebook for Grades 1-5 Math (Jamie York) Multicultural Mathematics (Zaslavsky) Geometry Lessons in Waldorf	Geography Botany- The Plant and The Living World of Plants (Grohman)	Ancient Greece Ancient Mythologies (Kovacs)

	Write On (Winter)		Schools (Schuberth)		
6	The Art and Science of Teaching Composition (Winter)	Eleanor of Aquitaine Independent Spirit of the Medieval World (Brooks)	Making Math Meaningful Curriculum series for grades 6-8. (York)	Sky Phenomenon (Davidson)	Ancient Rome (Kovacs)
		Ghost (Reynolds) Navigating Early (Vanderpool)	First Steps in Proven Geometry (Schuberth)	Geology and Astronomy (Kovacs)	Africa: A Teacher's Guide (Staley)
7		Copernicus Struggle and Victory (Sponsel)	Algebra for Grades 6,7,8 (Franceschelli)	Study of Chemistry (Julius)	The Age of Discovery (Kovacs)
		Tuck Everlasting (Babbitt)	Negative Numbers Sourcebook (Sigler)	The Wonders of Waldorf Chemistry (Mitchell)	Cyber Civics- Digital Literacy Curriculum
		Long Walk to Water (Park)		A Phenomena Based Physics Vol 1-3 (von Mackensen)	
		The Trumpeter of Krakow (Kelly)		Uprightness, Weight, and Balance (von Mackensen)	
				Earth Science (Schmutz)	
				World Geography	

8		<p>Short Stories- collection</p> <p>The Boys Who Challenged Hitler (Hoose)</p> <p>Warriors Don't Cry (Beals)</p> <p>Red Scarf Girl (Jaing)</p> <p>The Boy Who Harnessed the Wind (Kamkwamba)</p>			<p>Cyber Civics- Digital Literacy Curriculum</p> <p><i>On Teaching History (Barnes)</i></p> <p><i>Teaching History (Lindenberg)</i></p> <p>The Age of Revolution (Kovacs)</p>
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Figure 22- Foundational curricular resources for specialty subjects

	Arts	Music	Handwork / woodwork	Movement
1	<p>Form Drawing Grades 1-4 (Stein, Schuberth)</p> <p>Painting in Waldorf Education (Bruin and Lichthart)</p>	<p>Play Recorders in the Classroom Volumes 1-3 (Gable)</p> <p>Pentatonic and C Flute Tutor book series (Miles)</p>	<p>Will- Developed Intelligence- Handwork and Practical Arts in Waldorf School (Livingston, Mitchell)</p>	<p>Games Children Play (John Payne)</p> <p>Child's Play 1 & 2 (Van Haren & Kischnik)</p> <p>Child's Play 3 (Van Haren & Kischnik)</p>
2				
3				
4				
5	<p>Painting and Drawing in Waldorf Schools (Wildgruber)</p> <p><i>25 Plays Inspired by Waldorf Teachers David Mitchell, ed.</i></p> <p>Artistic Geometry (Miles)</p>	<p>Music from around the World for Three Part Recorder Ensemble (Preston)</p>		
6				
7				
7	<p>Drawing with the Head the Heart and the Hand (James)</p>			

8	Perspective Drawing Handbook (D'Amelio)			
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D. Bilingual Multicultural Education, Indian Education, Hispanic Education and Black Education

D. (1) Bilingual Multicultural, Indian Education, Hispanic Education and Black Education

Provide a description of how the proposed school’s curriculum will ensure equal education opportunities for students in New Mexico by addressing the goals of the Bilingual Multicultural Education Act (NMSA §22-23-1), the goals of the Indian Education Act (NMSA §22-23A-a1), the goals of the Hispanic Education Act (NMSA §22-23B-2), and the goals of the Black Education Act (HB 43)

The Sun Mountain Community School (SMCS) is a community of families and educators dedicated to cultivating the intellectual, social, emotional, physical and consciousness capacities of the developing human being. Our mission is to educate the whole child, using an age-appropriate approach to content and skills based on principles of Waldorf Education and the work of Rudolf Steiner. Our students engage in rigorous academics, develop connections to the natural world and moral discernment, and achieve an appreciation of themselves and others.

THE BILINGUAL MULTICULTURAL EDUCATION ACT

New Mexico’s Bilingual Multicultural Education Act (NMSA 22-23-1) provides the scaffolding to assure the goal that all New Mexico children are developing skills to be bilingual and biliterate in English and an additional language. The act requires schools to foster an inclusive and equitable learning environment. SMCS commits to meeting these requirements by using:

A Multicultural Curriculum

As a student moves through the grades, the Waldorf approach moves through all the world's cultures through oral folkloric tales and mythology, as well as deep historical and geographical studies (by the end of 8th grade, each populated continent will be given its own three week main lesson block). To expand on this content, main lesson and specialty teachers work together to bring songs (sung together and played on the flute in the classroom and in orchestra) as well as festivals, verses, and folk art from all over the world in alignment with the core study. Families that identify with the cultural heritage being taught, are invited to speak or lead a craft or cooking class from their own perspective. This allows students to relate to different cultures through the world’s celebrations: their foods, songs, art, and joyous events, giving them a natural way to “appreciate the value and beauty of different languages and cultures.” In addition, the Waldorf approach always includes hands-on experiential learning, which brings content more fully into the student by using the hands/body in

conjunction with historical and cultural lessons. Instructional modalities such as cooking, movement, dance, singing, and playing musical instruments are all integrated throughout the cultural curriculum.

Furthermore, Waldorf teachers use world-language verses and songs with students not only in specific world language classes, but in main lessons as well. This way, second languages are not separated out for only a specific time and teacher but are woven throughout the day. Because they are brought through verbal arts, groundwork is laid from the very beginning for multiple languages.

An Enlivened K-8th Spanish Language Program

SMCS provides a research-based scope and sequence of K-8 Spanish curriculum that reflects and supports the corresponding English curriculum (see Attachment 8 for our Spanish education program). Because specialty teachers, including the Spanish teacher, and main lesson teachers work through storytelling and in alignment together, students will often hear the same story that they work with for multiple days in their main lesson in English and again in Spanish in their Spanish class. In this manner, the language capacity is supported and strengthened for ELL learners as well as the English learners learning Spanish. In addition, the content of the story itself is enhanced by hearing it through the lenses of two different languages.

Detailed Support Plan for ELL Students

(see section I.G.(2.))

A Robust Community Cultivation Plan

The SMCS commits to developing their community through festivals and other public events, incorporating families into curriculum and field trips, hosting or participating in community educational and cultural events, and community field trips and service.

1. **Festival life.** Like its predecessor, SMCS will host up to 4 festivals a year, open to the community. Festivals correlate with the seasons and allow multiple cultures to be woven together. Events will be conducted with bi-lingual translations. These events allow families to experience our beautiful campus, connect with other families, and celebrate the seasons and our children.
2. **Community events.** As an arts-integrated school, performances abound. There are two musical concerts each year where grades 5th-8th perform orchestra, band and choral numbers. Each grade puts on a play each year, providing an opportunity for parents to gather and connect.
3. **Classroom volunteer opportunities.** Parents and family members of students are invited to join field trips, festival preparation, play preparation, parenting support, curriculum specific parent presentations, and cultural celebrations. Each year, every class teacher invites parents of children in their class to present cultural celebrations from their family's cultural background. Through these cultural exchanges, students from non-dominant cultures are honored and their cultures celebrated and studied, which results in an alive and authentic multicultural curriculum.
4. **Collaborations and Partnerships.** SMCS commits to attending local education events, like Cultures of Thinking in Action monthly meetings and cultural event involvements (like the Pet Parade), and community field trips.
5. **Community service.** The SMCS commits to community service through projects such as "adopting" a portion of the Santa Fe River and participating in 2 clean-ups a year for middle schoolers. Regular community service hours are required and tracked in 8th grade.

6. **Deliberate outreach to Hispanic populations.** We plan to have a Spanish speaker at our outreach events in tandem with the outreach booths. (Please see the next point.)
7. **Outreach booths.** We attended events on Saturday April 27th, 2024, Bilingual Books & Babies, Southside Library; on Friday March 3rd, 2024, Genoveva Chavez Center; and on Sunday May 18th, 2024, Downtown Farmer's Market. Other events will be added in time.

Cultural Sensitivity and Inclusivity

Core Principles of Waldorf education acknowledge multiple strands of inclusivity and cultural sensitivity: the purpose to serve both the individual and society (#3), the intention to foster a culture of healthy relationships (#4), and the commitment to work to increase diversity and access to all sectors of society (#5). In alignment with these principles, SMCS aims to cultivate linguistic and cultural sensitivity on our campus and in our curriculum. We also commit to creating a campus where the community feels welcomed, equal valued, and accepted. In addition to our commitment to experiencing the world's cultures deliberately through the K-8 curriculum, SMCS also considers cultural sensitivity in how different cultures and ethnicities within a culture are presented.

On Our Campus and Out In the Community

Professional development provided to meet these ends. SMCS commits to yearly diversity training for all professionals working with our curriculum and in our community. See Section II. D.(4) Professional Development for the full PD plan which includes training in cultural and linguistic responsiveness. Curriculum will be reviewed and updated as teachers and administrators learn of any needed changes.

A faculty and staff that reflects our community. A commitment to hire and train multilingual, multicultural faculty and staff that welcome community activities conducted in English and Spanish.

A welcoming space for students from non-dominant cultures. SMCS commits to creating a welcoming environment for students through its de-colonized curriculum, celebration of diverse cultures, and continued learning by faculty and staff on how to eliminate any gaps in student performance between those of different cultures and backgrounds.

Every child outdoors. The Waldorf focus on outdoor education, from Nature Studies in the early grades to survival skills and camping programs by eighth grade, takes students out of traditional top-down classrooms and places them all on equal footing with experiential learning at the forefront. The Outdoor Program not only teaches hands-on skills early on (i.e. first graders learn to set up tents; third graders learn to bundle up with correct layers for tent sleeping and nighttime cold in autumn), but also includes culturally rich experiences such as the 4th grade trip to Chaco Canyon where pueblo culture and civilization are studied in depth while in the spaces of those peoples.

In Our Curriculum

Diverse representation in artistic materials related to humans. As an international education (today there are 1,092 Waldorf schools in 64 countries and 1,857 Waldorf kindergartens in more than 70 countries and 6 continents around the globe (Franz, 2022)), the arts materials used to represent and create images of the human figure, reflect a diversity of skin tones. Waldorf education provides handmade dolls in the Early childhood program. These are typically handmade and there will be representation of different skin tones in classroom dolls, as well as crayons and pencils to allow representations of people with variations in skin tones.

Decolonized curriculum. Through continental geography classes and historical blocks, cultures are presented with the intention to "decolonize". This means that each continent and its people are studied in their indigenous forms before humans were engaged in massive colonization efforts. North

and South American peoples, mythologies, empires, alliances, trading powers and routes, and academic studies are studied before the Age of Exploration. The African continent, its peoples, mythologies, empires, alliances, trading powers and routes, and academic studies are studied by students before learning about European and African slave trades. This does two things: it gives all cultures their own historical timeline so historical representation isn't confused with the timeline of European history; and it builds interest and a natural empathy for each culture's triumphs and failures before they learn of the impact of being overcome by another culture.

Neutral representation of history. We are careful to present history as historians. That means a commitment to separating any personal ideologies or modern states of consciousness from our historical accounts. Ours is the study of the consciousness of humanity, and its evolution over time. Our aim is to enliven students' feeling life for all cultures and for both the goodness and, by middle school, the shocking short-comings of humanity. We teach the evolution of humanity with the belief that, although humans make brutal setbacks, we are collectively moving towards greater, more loving consciousness. We leave our own opinions about topics out of lessons, present biographical experiences that students can connect with, and then we allow the students to come into their own thoughts on topics in their own time. When we teach them out of our own wonder and fascination for humanity, they develop their own thoughts and questions, and evolve themselves as lifelong learners.

Curriculum that shows how humanity evolves together. We teach history with the awareness that evolution depends on inspirations and information passed between cultures and continents. Eras of history often occur relatively simultaneously in different parts of the world, even before social media. We make conscious efforts to show eras of human history across different cultures, such as medieval ages across Europe and Asia, the Renaissance across Africa, the Middle East, Asia, and Europe, and the Revolutions across Europe and the Americas. Discovering these connections is another way to make young people feel a part of their world, connected and consequential.

THE INDIAN EDUCATION ACT

The Indian Education Act (22-23A-2) aims to ensure an environment that welcomes and cultivates the academic and emotional success of American Indian students enrolled in New Mexico public schools. The Sangre de Cristo Waldorf Public Charter School aims to achieve these goals by:

- 1. Incorporating Native American Perspectives.** Continue to teach New Mexican history from a textbook written by a local tribal collaboration.
- 2. We will reach out to local tribes to let them know of our school mission in order to welcome students they might think would benefit.** As in our application time, we will continue to invite Native participation and support, as long as they are interested in our out-reach.
- 3. If a tribe is interested, we will include time and space for Native students to take Tewa classes on campus,** which was also offered at the former Santa Fe Waldorf School.
- 4. Incorporating Indigenous education techniques.** In Professor Hani Morgan's article, [What Every Teacher Needs to Know About Native American Students](#), he notes that the first element to increase academic success rate in Native students is to understand that often Native students do not fare well in typical school due to learning style differences. The second thing to consider is that these differences can not be generalized across all Indigenous populations. This gives our curriculum our starting point. When we first address Native

American history in 4th grade in “Local Geography & New Mexico History”, we have the unique opportunity to teach the diversity of Native cultures by learning the 19 different sovereign nations and Pueblo Tribes in New Mexico. From the outset, then, Indigenous People are experienced as diverse, in and of themselves. While stressing the importance of not overgeneralizing, Professor Morgan gives some guidelines to things for teachers to be aware of might be occurring in their Native American student population (Morgan, 2009).

a. Individual observation is the first approach. To avoid overgeneralization, teachers must first and foremost rely on observation of the child. This aligns with Waldorf’s teaching philosophy of observation (Section I.F. (1) Curriculum follows the child, not the other way around).

b. Values towards humility and harmony. There is a contradiction between the Anglo love for the individual and personal achievement, and the Native American values of humility and harmony. In the classroom, this may look like a Native person’s restraint to “out-achieve” other students, believing that their “as a result of their family’s emphasis on the importance of unity, oneness, and cooperation”.

c. Teaching by demonstration and observation. Beginning critically in Kindergarten, Waldorf students learn experientially, by doing and imitation (See Section I.A.(3) The Approach to Kindergarten). This technique of “I do, we do, you do” is continued on through the grades.

5. Seek feedback and continuous improvement. Waldorf encourages parental involvement in the education of students, including explicitly inviting parents to present lessons from a family’s culture, as well as seeking parental input before presenting certain lessons. We see this as especially important with any student outside the teacher’s own ethnic background, including Indian students. We seek open conversations with parents concerning cultural differences that teachers and staff may be missing, as a part of our continual and expansive relationship with them about the development of their child.

The University of Denver offers instruction on “Inclusive Teaching Practices for Native Americans: Welcoming Academic Spaces for Native Americans”. According to this study, many people are unconsciously subscribing to “a worldview that reflexively considers indigenous cultures and ways of knowing as other or alternative or exotic or primitive” (Mercurieff & Roderick, 2013). Native American students are then required to “develop resilience to navigate stressful situations in higher education classrooms (Waterton, 2013).” Their suggestions show an overlapping value with Waldorf pedagogy, suggesting a pedagogy built on a more holistic human view, encompassing academic success of a multicultural education system. This is what they suggest (Iturbe et al, 2020):

Place-Based Learning. Place-based education promotes learning experiences that are rooted in the cultural, historical, environmental, economic and literary contexts of students. As such, it is critical to understand the ways that culture and place are intrinsic to the experiences of Native students and other populations (Conti, 2013).

All-Senses Experiential Learning. Experiential learning in the Alaska Native way uses all the senses: sight, hearing, taste, touch, and smell, plus intuition and gut feeling. This framework recognizes that young people learn through engagement in activities that support their community in cooperative, collaborative and intentional ways that increase memory and skill development (Mercurieff & Roderick 2013).

Storytelling. Storytelling is central to the learning of indigenous peoples. Stories convey information about history, survival, culture, and are used as a formative corrective method when an individual creates disharmony in the community. In this latter example, Elders may choose to tell a corrective story without criticizing, singling out or disciplining an individual knowing that lessons will be remembered better if they are conveyed in an animated style (Mercurieff & Roderick 2013).

The Waldorf pedagogical approach aligns directly with these recommendations.

Place-based education (PBE) immerses students in local heritage, cultures, landscapes, opportunities and experiences, using these as a foundation for the study of language arts, mathematics, social studies, science and other subjects across the curriculum. Students' geography educational program (see Attachment 8) begins with mapping their bedrooms, the school campus, and the route from their home to their school. The science educational program (see Attachment 6) begins with experiencing the natural world on campus. The outdoor program (see Attachment 9) shows how first graders' first camping trip is on the school campus for a night. The camping trips slowly become longer and further away.

PBE emphasizes learning through participation in service projects for the local school and/or community. Students of all grades have daily and weekly chores. They take on responsibility for keeping their classrooms and campus clean throughout their time at the school. Beginning in middle school, students begin to take on community service and have bi-annual river clean up days. The process of beginning where you are and moving out, place-based education, repeats itself over and over in our educational program.

'All-senses' experiential learning. In addition, the Waldorf approach is explicitly focused on 'all-senses' experiential learning; from Kindergarten onward the Waldorf teacher is consistently bringing in head, heart and hands, and the 'hands' (i.e. the will and the doing part of the child) is developed through imitation, meaningful physical work such as handwork, and a movement curriculum that meets students in culturally meaningful ways (see Attachment 8 for the full movement educational program). In addition, storytelling is a primary mode of instruction, not just for ELA and social studies, but also for math and nature studies. Students are engrossed in stories as means of learning how to think critically and creatively (see Section I.A.(3) Storytelling).

HISPANIC EDUCATION ACT

The Hispanic Education Act, (22-23B-2.A.-C. NMSA 1978), aims to to close the achievement gap, increase graduation rates, and increase post-secondary enrollment of Hispanic students. To do this, the Sun Mountain Community School aims to:

1. Apply the above elements written in Bilingual Multicultural Education and Indian Education Acts.
2. Identify disparities, as seen in our Equity Plan.
3. Instructional staff will collect data on student outcomes, engagement, and satisfaction, which the Equity Council will analyze and create adaptations to improve future outcomes, paying particular attention to the low-income, ELL, special education, and high-mobility student outcomes.
4. Flexibility and adaptability. SMCS, through collaboration with its Equity Council, will address any disparities that arise and work creatively and responsively to develop support for Hispanic

students experiencing educational struggles. Through partnerships with experts in bilingual and ELL students, as well as multicultural education approaches highlighted above, SMCS will hold Hispanic students as a priority and aim to prevent and address the national achievement gaps for this group of learners.

BLACK EDUCATION ACT

New Mexico House Bill 43 - Black Education Act seeks to assure a healthy and supportive learning environment for black students and their families. Similar to the above acts, it requires that schools closely reflect on their curriculum to assure that materials and people taught in the curriculum that include the history and culture of Black people in New Mexico, America, and the world, and that curriculum includes equitable and culturally relevant instructional materials for Black students. In addition to the above acts, the Black Education Act also requires assurance that all students are being disciplined with equity, and that prejudice does not hinder a black student from accessing care for health and learning needs.

To align ourselves with this act, SMCS commits to the following:

- Disciplinary sanctions may include in-school suspension, school service, suspension or expulsion. Corporal punishment shall be prohibited by each local school board and each governing body of a charter school. Prior to enacting it, each proposed disciplinary sanction will be explicitly reviewed for evidence of unconscious bias to ensure such bias is not being enacted unconsciously onto black, hispanic, or indigenous students (or other students from non-dominant cultural backgrounds).
- Students may carry and self-administer asthma medication and emergency anaphylaxis medication that has been legally prescribed. Faculty shall seamlessly fold in such medication as good and beneficial for the community.
- Students will have immediate access to a back-up medication that can be kept at the school (provided by the parent) in the event of an emergency. Faculty and Staff will be informed of where such medication is kept and at least one member of faculty with knowledge of how it is administered shall be available at all times.
- Section 9 “Anti-Racism and Racial Sensitivity Training and Professional Development.” Each year, all school personnel shall successfully complete an online or in person antiracism, racial awareness and sensitivity training, or professional development approved by the department that addresses race, racism, and racialized aggression and demonstrates how to create and foster an equitable and culturally responsive learning environment for racial minority students.
- We will provide links, including a Q-R code to the statewide hotline to report school-based racially charged incidents or racialized aggression, as well as direct reporting to a SMCS administrator that will monitor and address such incidents.
- MCS will provide take-home resources to students, parents, and school personnel with links and other information to directly access the culturally relevant resources on the NMPED website.
- We will also provide mechanisms for parents, community and business organizations, public schools, public post-secondary institutions and state and local policymakers to work together to improve educational opportunities for Black students

“Considerable research documents the disproportionate suspension rates for African American and Latino students, further limiting access to educational opportunity (Gonzalez & Szecsy, 2004; Losen, Hodson, Keith, Morrison, and Belway, 2015; Skiba, Michael, Nardo, & Peterson, 2000; Skiba & Peterson, 1999; Skiba & Rausch, 2006). Students who are suspended are more likely to repeat a grade, drop out, and become involved in the juvenile justice system (Fabelo et al., 2011; Lee et al., 2011).

“For example, the suspension rates of Alice Birney Waldorf School, a public K-8 Waldorf charter school in Sacramento, California, were at least two thirds lower than those in the city of Sacramento as a whole in each of the years between 2011 and 2013 (see Table 5, next page). In 2013, suspension rates for the school as a whole and for African American and Latino students were only 0.7%. In Sacramento City Unified School District, the rates were 8 times higher overall, and 10 times higher for African American and Latino students. This data-driven example illustrates that Waldorf pedagogy’s positive approach to student discipline has real-world impact on statistics that disproportionately impact black students.”

(SCOPE 2015, pg 72)

Waldorf teachers are explicitly directed to focus on teacher-supported social-emotional learning and conflict resolution between students. Rather than punish and exclude, Waldorf teachers take time to work through difficult feelings or differences of opinion that can lead to student conflict. Through this proactive process, student discipline in the forms of suspension and expulsion are used rarely and only when other, more relational methods have proven unsuccessful. Waldorf teachers are trained to spend time on and be attuned to social-emotional learning, using examples from what is happening in a class, often folded into “pedagogical stories” before they become problems that require discipline. Thus social-emotional learning is prioritized and integrated throughout the curriculum, not as an add-on at a few appointed times. This creates an environment where traditional discipline is much less used (see Section I.F.(1) Discipline).

References for this section:

Morgan, H. (2009) , *What Every Teacher Needs To Know To Teach Native American Students*, The Catholic Sun Newspaper.

Iturbe La-Grave, V., Eagle, V., Jordon, S., & Johnson, J. (2020). *Native American Pedagogies Module*. <http://inclusive-teaching.du.edu/native-american-pedagogies>.

D. (2) Equity Plan

Provide a description of how the proposed school will create an effective and equitable system of supports for all students focused on root-cause analysis, equity-focused leadership and continuous improvement, and culturally and linguistically responsive curriculum and pedagogy.

The Sun Mountain Community School (SMCS) is a community of families and educators dedicated to cultivating the intellectual, social, emotional, physical and consciousness capacities of the developing human being. Our mission is to educate the whole child, using an age-appropriate approach to content and skills based on principles of Waldorf Education and the work of Rudolf Steiner. Our

students engage in rigorous academics, develop connections to the natural world and moral discernment, and achieve an appreciation of themselves and others.

SUN MOUNTAIN COMMUNITY SCHOOL EQUITY STATEMENT

“The purpose of art is to lay bare the questions that have been hidden by the answers.”

— James Baldwin

The Sun Mountain Community School is nonsectarian and does not discriminate on the basis of gender, race, color, religion, disability, sexual orientation, gender identity or national and ethnic origin in its educational, administrative, admission, athletic, and school programs and policies.

The Sun Mountain Community School is committed to working toward a diversified social atmosphere that nurtures understanding and an experience of the common humanity of all the world’s peoples. We honor and embrace the palette of differences within humanity and welcome people regardless of race, ethnicity, gender, creed, religion, sexual orientation, and physical or medical condition. In so doing, we aspire to a peaceful evolution of humankind which honors and celebrates diversity.

Looking back on our historic roots, we see that any authentic Waldorf school must be a place where social justice — and its critical components of diversity, equity, and inclusion (DEI) — is organically interwoven throughout the being of the school. A cornerstone of our pedagogy is teaching students to be thoughtful, compassionate citizens, and this includes giving them living, age-appropriate experiences of diversity, equity, and inclusion. We work every day to shine a light on those aspects of Waldorf curriculum and social life in our community that still need to improve. It is an ongoing process, as it should be.

ADDRESSING THE FINDINGS IN THE MARTINEZ/YAZZIE LAWSUIT

The SMCS is committed to establishing an effective and equitable system of support for all students by prioritizing three key pillars: root-cause analysis; equity-focused leadership and continuous improvement; and culturally and linguistically responsive curriculum and pedagogy. The PED’s four-part strategy calls on SMCS to initially concentrate on the following four components:

- Establishment of the School’s Equity Council
- Completion of a Readiness Assessment
- Implement a Culturally and Linguistically Responsive Framework
- Submit and Implement a 90-day plan through NMDASH

Equity Council: The PED sees an opportunity for School’s to lead with equity-focused leadership as being the forefront of the work to address the Yazzie-Martinez findings. The Equity Council will be comprised of members from the SMCS’s community and those people will collectively create an equity plan for the school to address the specific needs of economically disadvantaged students, Native American students, English learners, and students with disabilities. Recruitment and appointment of council members will be fair and transparent and posted on SMCS website. Fifty percent of equity council members will represent students from the at-risk groups identified in the

lawsuit: Native Americans, Students with Disabilities, English Learners and Economically Disadvantaged, and highly mobile families. Furthermore, membership will directly reflect the school population by ethnicity; at this time, we will use the current enrollment data from Santa Fe Public School District to estimate our percentages of total enrollment at .8% Black or African American, 80% Hispanic, 2% Asian/Native Hawaiian/ Pacific Islander, 16% White

Equity Council work includes:

- Completion of the required Martinez/Yazzie Readiness Assessment
- Creation of the School Equity Plan to support school alignment with the NMPED Culturally and Linguistically Responsive (CLR) goals for improving outcomes for at-risk students, Native American students, Students with Special Needs, students who are English learners, and economically disadvantaged students; this plan will be uploaded to NM Dash
- Creation and implementation of a culturally and linguistically responsive (CLR) framework that improves academic outcomes for at-risk students, Native American students, Students with Special Needs, students who are English learners, and economically disadvantaged students
- Creating a report to describe SMCS system for, and tracking of, funding and uses of funding to improve outcomes for at-risk students, Native American students, Students with Special Needs, students who are English learners, and economically disadvantaged students
- Reporting out all findings and completion of required tasks to the school Leadership Team and Governing Board
- Empower teachers to implement CLR practices using the framework

Readiness Assessment: The Readiness Assessment is meant to support the Equity Council in facilitating conversations about a school's services and programs that address at-risk students. The NMPED has published a Readiness Assessment Tool. The Equity Council would use the tool to assess the school's top areas of focus and develop its CLR Framework and Equity Plan.

Culturally and Linguistically Responsive Framework: The NMPED counsels that holding students' unique identities and cultures and languages at the center of the equity work is a key to implementing an effective equity plan. A culturally and linguistically responsive ("CLR") framework prepares students for college, career and life by development of all parts of the human being, including physical and social-emotional, as well as academic. This aligns seamlessly with the Waldorf tripartite focus on "head, heart, hands" and SMCS will use the resources from the NMPED to further develop this for at-risk students identified in the lawsuit.

Advisement and Progress Monitoring: The Equity Council uses Advisement Packages to make recommendations to the school. An Advisement is based on findings from the Readiness Tool and the CLR Inventory and Framework, and other available local data.

In addition to the above mentioned action steps, SMCS also commits to the following:

Root-Cause Analysis:

- The school will implement a comprehensive approach to root-cause analysis to identify the underlying factors contributing to student challenges. This involves examining academic, social, and emotional aspects that may hinder student success.
- Regular assessments and data-driven decision-making will be employed to pinpoint specific areas of concern. This may include analyzing standardized test scores, attendance records, and socio-economic factors.

- The school will engage in collaborative efforts with teachers, parents, and community stakeholders to gain a holistic understanding of student needs and challenges.

Equity-Focused Leadership and Continuous Improvement:

- The school's leadership will actively champion equity-focused practices, ensuring that every decision and policy is designed to eliminate disparities and promote inclusivity.
- Continuous improvement will be embedded in the school's culture, fostering a commitment to ongoing assessment and adaptation. This includes regularly reviewing and refining support systems based on the evolving needs of the student body.
- Professional development for teachers and staff will prioritize equity training, fostering a shared understanding of cultural competence and inclusivity.

Culturally and Linguistically Responsive Curriculum and Pedagogy:

- The school will develop and implement a curriculum that reflects the diversity of its student population. This includes integrating culturally relevant content and perspectives into lesson plans and instructional materials.
- Pedagogical approaches will be tailored to accommodate diverse learning styles and linguistic backgrounds. Teachers will receive training in culturally responsive teaching methods to create an inclusive and supportive learning environment.
- Language support programs and resources will be provided to address the needs of English language learners, ensuring they have equal access to educational opportunities.

Multi-Layer System of Support (MLSS):

- The school will implement a multi-tiered system of support that provides interventions at various levels based on individual student needs.
- Tiered interventions will include differentiated instruction, targeted interventions, and specialized support services. Regular monitoring and assessment will guide the adjustment of interventions to ensure effectiveness.
- Collaboration between general education and special education staff will be emphasized to create a seamless system of support for all students.

By integrating these principles, SMCS aims to create a dynamic and responsive educational environment where all students can learn, regardless of their background or individual challenges. The commitment to equity, continuous improvement, and culturally responsive practices will provide a foundation for an inclusive and effective support system.

Figure 23 - Steps to create and implement school's equity plan

Steps	Who	What Task	What Stage of the CLR/SbD Framework	When will it be completed?
1.	Forming Equity Council	Work through pages 12-19 of CLR/SbD workbook to begin collecting data on our community landscape.	Stage 0 - community landscape analysis	Application Process
2.	Head of School	Appoint Official Equity Council to address issues of equity for all	Stage 0 - community landscape analysis	Implementation year

		students with intentionality for the needs of economically disadvantaged students, American Indian and Alaska Native students, English learners, students with disabilities, and other underserved students as identified in the Maritnez and Yazzie Consolidated Lawsuit. Efforts will be given to appoint Council members that reflect these different groups.		
3.	Equity Council	Review and assess pages 12-19 data collected.	Stage 0 - community landscape analysis	Implementation year
4.	Equity Council	Use The CLR/SbD workbook pages 20-32 to take information gathered in Stage 0 to create a 5 year plan for mission driven outcomes.	Stage 1 - A community- driven set of desired results for underserved students moving forward	Implementation year
5.	Equity Council & School Board	The Equity Council will present their research and work to the School Board for specific recommendations to meet their goals.	Stage 1 - A community-driven set of desired results for underserved students moving forward	Implementation year
6.	Operational Staff	SMCS's operational staff will be trained in the Equity Council's findings and will work to implement any practices adopted by the School Board.	Stage 1 - A community-driven set of desired results for underserved students moving forward	Implementation year
7.	Instructional Staff, Administrative support staff and mentors	SCPCS's instructional staff will be trained in the Equity Council's goals and adapted practices into their curriculum material and instructions.	Stage 1 - A community-driven set of desired results for underserved students moving forward	Implementation year

8.	Instructional staff	Instructional staff will be responsible for collecting and reporting any relevant student data in connection with these goals related to supporting the needs of Native American students, Hispanic students, Black students, English Learners, economically disadvantaged students, and students with disabilities.	Stage 2 - A plan to evaluate the success of various initiatives to support these students	1st year of operation
9.	Head of School Instructional staff, Equity Council	The Head of School will bridge themselves between the instructional staff, learning what support instructional staff need to meet their established equity goals and report back to the Equity Council. The Equity Council will utilize statewide equity council trainings and webinars provided by the state to support instructional staff.	Stage 2 - A plan to evaluate the success of various initiatives to support these students	1st year of operation
10.	Equity Council	Use The CLR/SbD workbook pages 33-35 to take information gathered by instructional staff.	Stage 2 - A plan to evaluate the success of various initiatives to support these students	1st year of operation
11.	Equity Council	Use The CLR/SbD workbook pages 36-46 to evaluate data collected in the 1st year of operation and make a plan to improve the charter system of teaching and learning to better address underserved student needs.	Stage 3 - A plan to improve charter systems of teaching and learning to better address underserved student needs	2nd year of operation
12.	Equity Council	Use The CLR/SbD	Stage 4 - A plan to	2nd year of operation

		workbook pages 47-50 to adjust and improve our commitment to reaching underserved populations and improving their academic and social success in our school.	adopt ongoing systems that keep district, school, and charter schools focused on underserved populations	
13.	Head of School, Instructional staff, Equity Council	Circulate through Steps 5-12 to continually improve school cultural inclusion and above standard performances of all students.	Stage 1-4	All future years of operation

References for this section:

Franz, R. (2022). *What is a Waldorf school?*. U.S. News and World Report. <https://www.usnews.com/education/k12/articles/what-is-a-waldorf-school>

E. Graduation Requirements

E. Identify the proposed school’s requirements for graduation, if applicable, and explain any changes or additional requirements that vary from state mandated minimum requirements.

ENTER APPLICANT RESPONSE HERE:

Not Applicable, at this time

F. Instruction

F. (1) Instructional Philosophy

Provide a **clear, comprehensive, and cohesive** overview of the teaching and instructional philosophy

The Sun Mountain Community School (SMCS) is a community of families and educators dedicated to cultivating the intellectual, social, emotional, physical and consciousness capacities of the developing human being. Our mission is to educate the whole child, using an age-appropriate approach to content and skills based on principles of Waldorf Education and the work of Rudolf Steiner. Our students engage in rigorous academics, develop connections to the natural world and moral discernment, and achieve an appreciation of themselves and others.

INTRODUCTION

We will describe the instructional philosophy of the school. We talk about how the curriculum comes, not through textbooks, but through the teacher. Because of this, Waldorf teachers must cultivate knowledge of the whole child, the developmental method, the Waldorf educational program, core curriculum standards, and the material being taught, as well as cultivate self knowledge. We will show how central to the role of a teacher is in cultivating relationships so that a student feels held by the teacher, the class, the family, and the community. We will see a teacher's approach to the classroom. Finally, we will look at the professional development that will help cultivate all these skills.

Alignment with the Mission

In this section, the Founding Team will give a picture of the skills, knowledge and approach Waldorf teachers use to succeed in their classroom. The instructional philosophy supports the mission of educating the whole child in alignment with the different stages of the development. In fact, we will stress that it is through the teacher's knowledge of the head, heart, and hands of the child and the stages of development that teachers make their choices in instruction and in interaction.

Equitable to All Students

Throughout this section, we will see again and again, the emphasis on “the whole”. A teacher cultivates relationships with the whole community to support the student. She teaches the class as a whole, modeling a community with different needs and abilities. Yes, groups break off for work, but they always return to the whole. As we value a wide variety of subjects in our program and an expansive range of cultural and geographical backgrounds covered in our curriculum, we also value a wide variety of learning types and diversity in our students. With “whole” being a main component in our mission, inequity has no place.

WALDORF TEACHING AND INSTRUCTIONAL PHILOSOPHY

The Central Role of a Waldorf Teacher

“We must find our way more and more toward our task, which is to make human beings truly human. It sounds simple. But grand and complex questions are raised by this statement. What exactly is “truly human?” Herein lies the key to preparing Waldorf teachers. Their humanity is what has to be developed. That’s all.”

Rudolf Steiner, in a lecture to the first Waldorf teachers.

While Waldorf education places children at the heart of its pedagogy, Waldorf schools depend on the teacher as a fulcrum for the educational process. “School” comes through the teacher, not via a textbook. This allows a teacher to choose the material and presentation according to the needs of the class or even a particular student. The teacher can also choose to present material in ways that it weaves into other things that might be occurring in the school culture - from a change of seasons to a school festival to a student illness or tensions rising between friends in the classroom. When a teacher leads a class through material in such a lively, well thought out and prepared manner, it enhances the interest and the respect of the teacher in the eyes of the child. This initial, imaginative, and engaging representation of material is later supported with worksheets, workbooks, maps, and texts, in the “abstract conceptualization” stage of learning.

To teach out of this freedom effectively, a Waldorf teacher must cultivate the skills listed below.

Cultivating an Understanding for the Developmental Method

The teacher teaches to the individual out of an understanding of the whole child and the phases of child development. “The class teacher provides a focus for the class and continuity over many years of development. The teacher aims to be a figure of moral authority based on commitment, care for the children and a close relationship with the parents.” (Avison & Rawson, 2014). Waldorf teachers recognize that their role is to inspire, mentor, and facilitate the learning process. The real work of learning belongs to the individual child. Because of this, the Waldorf teacher remains conscious of their role in helping children to fulfill their potential as a human being and of creating an environment for learning within which children will feel safe, cherished, engaged, and empowered. From an understanding of the whole child and the developmental method, the teacher makes long-term and in-the-moment decisions of how to instruct and interact with a child and her class.

The Kindergarten Teacher. The kindergarten teacher teaches children in their first 7-year stage of development where humans learn primarily by imitation and example, and that their learning is best supported in a home-like setting grounded in practical activities that are of immediate interest. Teachers focus on allowing children to fully develop their imagination, curiosity and ability to use the senses when observing the world, and build self-confidence while interpreting the world in preparation for the higher levels of cognitive thinking developed in the later grades. The gesture of early learning to promote children’s engagement with the world around them.

The Elementary Grades Teacher. As the child, moving to the second stage of development, 7-14, is cultivating their feeling world and their connections, wonder, and reverence for all that is in the world, the elementary teacher cultivates imagination in the student. This is why teachers through the elementary grades rely so heavily on storytelling, because it helps cultivate the child's imagination and connection to the world. Beauty also cultivates imagination and so the elementary school teacher works to present the working space and the program content in a way that is beautiful.

The Upper Grades Teacher. The child between 14-21 learns by being inspired. The teachers in the high school and into the middle school, inspire the students with the cultivation of their own highest selves and mastery over their subjects. They also teach through the biographies of inspiring human beings in the world, past and present.

Cultivating an Understanding for the Waldorf Educational Program and Core Curriculum

As noted earlier in this section, what is taught is as important as how it is taught. The Core Curriculum is set. The teacher chooses how to deliver these elements to their students, using Waldorf curriculum as her guide. The pedagogy encourages teachers to bring stories, songs, celebrations, books, the types of poetry, the activities to supplement a piece of content, etc., that enliven the lessons and the students. The Waldorf teacher needs to spend ample time in becoming familiar with the content of the Waldorf educational program as well as the core curriculum, so that they can have freedom in how they present.

In first grade for example, teachers teach language arts through fairy tales. Yet, fairy tales are part of a universal human experience. Which fairy tales resonate with the teacher? Which fairy tales speak to the students of the class, their ethnicity, the personality of the class, or the struggles they face? These are the considerations a Waldorf teacher makes and the more they know their subject matter, the better choices they can make. The most fascinating content will not come alive in a student if it is not

alive in the teacher first. If it is alive in the teacher, the core curriculum standards that come through that content will be gobbled up, rather than swallowed dutifully.

Cultivating Self-Knowledge

Like most teachers across the profession, the Waldorf teacher brings their highest self before the children. The pedagogy expects their teachers “to be worthy of imitation.” That means a Waldorf teacher dresses professionally and speaks formally and kindly. They model preparedness. On an emotional level, Waldorf teachers practice self-knowledge. As the teacher's job is to clear the blocks from a child so the child can embark on the natural process of learning, so, too, a teacher must clear their own blocks so they perform their job with kindness, imagination, humor, and equity. They must become aware of their prejudices and personal issues. They must ask themselves if they are able to be truly present with a child, and if not, what is standing in their way? They must find a way to connect with each child and each of the aspects of the Waldorf education program. They must cultivate control of their emotions and avoid rigidity.

Curriculum Follows the Child, Not the Other Way Around

The expertise, expressed above, allows the teacher the freedom to meet their students where they are. Sun Mountain Community School teachers will adhere to the CCSS, although they will do so through a Waldorf program that meets the children or an individual child exactly where they are developmentally and academically. As part of our implementation year, we will create a detailed scope and sequence that will place common core standards into suggested curriculum stories, assignments, songs, poetry and games. However, the teacher will have the freedom to bring those same CCSS through other stories, assignments, etc., according to what speaks to the needs of the students and what is alive in them. This stems from the belief that teaching is not something that one can do to another; we can only facilitate the natural process of learning.

Teachers facilitate the “match” between the learner and knowledge. Waldorf teachers are trained to identify the best response to the changing interests and needs of each unique child. Because they recognize that children learn in many different ways and at their own pace, Waldorf educators understand that they must “follow the child,” adjusting their strategies and timetable to fit the development of each of their pupils. Teachers monitor and respond to children’s developmental stages and optimal learning modalities by adjusting their instruction, including the needs of special education students and English Language Learners.

Inquiry based learning. Once a teacher has deeply observed a child and knows the content of the curriculum, they can utilize inquiry-based learning with high proficiency. Inquiry-based learning engages students by making real-world connections through exploration and high-level questioning. A teacher creates hypothetical problems out of the educational material and encourages students to engage in problem-solving. When they are engaged in this way, the core curriculum becomes something they need to achieve their goal. Alain Gholam (Gholam, 2019) identifies seven benefits of IBL, arguing that it:

1. Reinforces curriculum content
2. Warms up the brain for learning
3. Promotes a deeper understanding of the content
4. Helps make learning rewarding
5. Builds initiative and self- direction
6. Works in almost any classroom
7. Offers differentiated instruction

Student centered. Throughout the grades, individual projects are present and increasingly used throughout the progression of grades. The teacher gives support in teaching how to research, write reports, and create the structures the student wants to create. Tradition also inspires students. Other classes are often invited to come and view some of the more traditional projects, increasing students' pride in their work, allowing younger students to dream into their future project, and allowing older students to remember their former work. Some examples of these traditional projects are the 3rd grade shelter project, the 4th grade animal project, and the 5th grade ancient civilization project. These come with research, writing, a drawn cover page, a presentation of some kinds, and a diorama or model. Other projects include state and country research projects through the years of geography and science projects in 6th-8th grade.

All of these projects allow students to direct their own learning within helpful guidelines. Through these projects, students are empowered to make decisions about their learning experiences, the creation and application of their knowledge, and demonstration of learning (Cuccolo, & DeBruler, 2023).

Student collaboration. Out of knowledge of students and knowledge of content, teachers often assign student collaborations. This can be simple peer to peer aid in a classroom assignment, group art projects, or presentations. This allows students to develop their social skills and learn how to divide work among themselves with a spectrum of talents and skills. These projects also benefit greatly from guidance from the teacher in group work skills.

“Because of Steiner’s emphasis on character development, the Waldorf teacher is exceptionally respectful to each child, creating a calm, kind, warm, and polite environment. The Waldorf teacher is a trained observer of children’s learning and behavior. These careful observations are noted and used to determine each student’s needs, and leads the teacher to intervene in the child’s learning with new lessons, fresh challenges, or reinforcement of basic ground rules” (SCOPE, 2015).

DEVELOPING RELATIONSHIPS

With Each Student and the Class as a Whole

As inherent in the practice of looping, Waldorf teachers value their relationship with their students above all else. This is why every day begins with the teacher shaking hands and greeting each student before they enter the classroom. The teacher not only is trained and practiced at “seeing” a child, they also understand that they hold the class with their preparedness, undistracted presence, and composed and quiet instruction. These relationships between the teachers and the individual students and the class as a whole are strengthened by looping, as the teacher gets to experience the child move through phases of their childhood development, change and grow. The relationship is also supported by the interdisciplinary curriculum. Teachers see students in various situations: those that come easily as well as those that are challenges. Teachers also take students on camping trips once or twice a year, which further shows new aspects of a child.

With the Parents/Guardians

A core teaching practice in Waldorf education is the collaboration between the teacher and the parents/guardian. Research shows that strong parental involvement increases students’ academic success (The Annie E. Casey Foundation, 2023). Parents and teachers interact often, so that teachers know what a child is experiencing in their home life and that parents understand the methods and approaches to child development the teacher is using at school. Individual agreements and informative parent engagement can bring helpful approaches into the household and make the daily

transition between the two environments calm and supportive. Looping, again, facilitates this trust and rapport. In K-8, teachers host four parent engagements a year in which a teacher will give a short presentation about the developmental method, as it applies to their children, about the work going on in the classroom, and likely also do some artwork together, so parents get the chance to put themselves in their child's shoes. Teachers send out weekly informative emails. Families are at times when appropriate invited to speak to a subject matter in which they have expertise in and which fits with the course content - such as a geographical region or a study that reflects a parent/guardian's former place of residence or profession. The parent body also has many opportunities to get involved in the school community and bond with other parents – such as in the preparation or gathering for concerts, plays, and festivals.

With Colleagues

Teachers also spend time regularly building relationships with colleagues. Faculty meet weekly for professional development for reading and discussions and for a creative activity such as singing or eurythmy. The interdisciplinary nature of the Waldorf approach encourages, if not requires, subject teachers to share not only curriculum content with each other but also student observations. Because both class teachers and subject teachers stay with the students over many years and stages of development, and their subject matters interrelate by design, teachers welcome the opportunity to share with each other observations of a student in a newly introduced concept or skill, the process of social challenge over the years, or the potent effect of a story or material or activity on a student.

At least once a semester, **specialty teacher meetings** are held for each class. At these, all the specialty teachers for a given class will meet with the class teacher to share observations on each student. In this way, all the teachers get to learn how a student fares across the curriculum: a child who is challenged in reading also delights in knitting or a child who struggles socially in movement class but leads the class in singing. This deep interest in the child allows the circle of teachers to approach each child with a greater understanding and wisdom while giving each child the gift of being seen by not only a single teacher, but by their whole community for the whole, complex, and wonderful being who they are. These types of relationships also lead to lower truancy of teachers (Weatherby, 2018).

APPROACHES TO THE CLASSROOM

Whole Class Teaching

The teacher always begins, directs, and ends the class as a whole. The opening movement exercises, verses, songs, and flute are conducted as a whole, as are the stories, and the closing of the class. In between these times, the whole is complemented by individual or group work, which may be separated into ability groups (sometimes mixed abilities, sometimes shared abilities) for math, reading, research, etc. Such branching groups are always re-integrated back into the whole class.

Teachers focus on the class as a dynamic whole. Teachers constantly work, however, to shift and reintegrate smaller groups—such as peer groups for math and reading—back into the whole class. A class of mixed-ability children is a model of community. Students learn from each other. The whole-class dynamic respects differences and encourages collaboration versus competition. The beauty of the variety of subjects in our approach is that children experience themselves, and each other, in different roles, becoming a leader to others in an area of strength or learning from others in an area of challenge. The Waldorf approach is so broad, that everyone gets to experience being good at a subject and being challenged by a subject. The opportunity to be seen and understood in multiple ways, places where one can shine and places where one needs help, develops students' positive

self-image, compassion, and engagement, thus empowering them as learners (Avison & Rawson, 2014. p. 33).

This approach may benefit most students but, according to Professor Hani Morgan's study, "What Every Teacher Needs to Know About Native American Students," Native students have a positive response to this technique, reflected in their classroom health and success. (See more about this study in the Indian Education Act section.)

Carefully Constructed Learning Environment

SMCS will effectively educate its students by first recognizing that every child is unique and there is no one-size-fits-all to teaching. We believe education is as much of an art as it is a science, and, therefore, we bring a full quiver of methods guided by the Core Principles of Public Waldorf Education to the classroom. Since it is our belief and goal to teach the whole child so that they develop into a well-rounded and fully capable adult, we recognize that the multiple intelligence domains are equally valuable and interdependent. We therefore ensure that our curriculum is attuned to the multiple intelligences in a well-rounded approach.

Valuing and Cultivating Beauty

Classrooms, materials and curriculum cultivate a sense of beauty and wonder as well as a respect for the natural world, affirming that the intelligence and imagination of the young child is best developed without the use of technology; up to grade six, computer technology is used only as a practical necessity for computer based testing, library and research purposes (Foer, 2011). Rooms are painted in soft colors and are decorated with chalkboard drawings done by the teacher, with student artwork displayed around the room, with masterpieces of artwork, and with books all of which thoughtfully align with the current block. Natural fibers are used throughout the classroom: chairs and desks are constructed from wood; the crayons are made from beeswax and the pencils are wooden; these are kept in woven baskets, wooden bowls, and lovely dishes. The value of these spaces and materials in the space is imitated by the students in their reverence for their learning materials and space.

"As students progress through the grades, particular features of the classrooms remain the same, like the soft color schemes of the walls, but others fade away or exist with greater sophistication and complexity. An eighth-grade classroom has a similar warmth and welcome as a first-grade classroom, but the displayed works are more sophisticated, and the desks are often arranged to encourage greater student collaboration" (SCOPE, 2015).

Clear Learning Objectives

SMCS believes that learning best occurs when there are clear educational objectives that are detailed, quantified, and measurable. We focus on intensive language and math literacy, as well as social literacy so that students are firmly grounded in the world around them and have the skills needed to navigate in it successfully. Guided by core principles of public Waldorf methodology, this understanding relies on measurable learning objectives in order to assess how well students are reaching their potential in the eight intelligences, while also mastering Waldorf/Common Core State Standards.

Developmentally Appropriate Materials

To ensure optimal learning at SMCS, we prioritize the preservation of childhood through careful attention to developmentally appropriate material. Premature intellectual demands that require undeveloped abilities to engage in abstract thinking are avoided and teaching of new concepts and skills are introduced at appropriate ages. We believe this fosters a cooperative, engaging environment. By bringing material to students when they are primed developmentally to receive it, students will

develop an intrinsic motivation rather than extrinsic, which leads to a happier student with a greater sense of well-being and ultimately achievement. Analyses show that This difference was quantified in Marija Buterin Mičić's 2019 study, *Academic Motivation of Pupils in Regular and Waldorf School*.

“The analyses of the results indicate that pupils from regular schools achieve higher results on the scale of controlled motivation and its subscales (external regulation and introjected regulation), while pupils from Waldorf schools achieve higher results on the scale of autonomous motivation and its subscales (identified regulation and intrinsic motivation). (Micic, 2019).

We believe that teaching concepts that are age-appropriate saves precious time, rather than attempting to teach concepts prematurely and repeatedly. Our desire is to defend childhood because we believe it supports the healthy development of the imagination through creative play, nature-based activities, appropriate autonomy, and a wholesome environment.

Discipline

When it comes to disciplining “bad behavior”, teachers first work preventatively by understanding and using a child’s natural rhythms in a day and their developmental stages. A teacher uses their own disciplines to create a space where it is easy for students to behave well.

Giving Children a Healthy Environment to Imitate

“Well-prepared lessons, employing a suitable range of teaching strategies, foster a mood of positive discipline. When pupils are inspired and encouraged to develop specific skills and capacities, while working at a suitable pace and level, conditions are present in which good discipline can flourish.” (Avison & Rawson, 2014). This is why researchers saw a dramatic decrease in disciplinary issues at the Urban Waldorf School when it undertook the Waldorf model (Prager 2001, p. 220).

Clear Rules and Appropriate Consequences

Rules, codes of conduct, and consequences provide students with a sense of safety and are designed to confirm a sense of care and respect for the people and objects in one’s community. “Social harmony, health and safety and a positive, creative learning environment are the guiding motives of school rules. Rules and codes of conduct should be clear, transparent and comprehensible to teachers, parents and pupils, in principle and in detail. Rules and the consequences deriving from their infringement should be age-appropriate. Where infringements do occur, the incidents are looked at on a case by case basis. The emphasis is on the deed that has been done and attention is given to making good what has been harmed” (Avison & Rawson, 2014. p36).

PROFESSIONAL DEVELOPMENT

Waldorf Certified Teachers or Currently Enrolled in a Training Program

In Waldorf Teacher Training programs, teachers learn the development methods and the integrative imagery of head, heart, and hand to enliven their curriculum. They also learn the skills they are expected to teach to their students including age-appropriate drawing techniques, watercolor painting, flute playing, singing, movement exercises, and speech exercises. They further learn the curriculum content of each grade. Teachers who are not able to commit to a full training because of time will be required to take summer courses, called Renewal courses, that review the curriculum content of that year. Teachers will be allowed a yearly stipend toward these classes (see section II.D for details). Fortunately, because of our long history of Waldorf education already in Santa Fe, we have many local teachers that already have this training.

Ensuring Equity

Developing Cultural and Linguistic Competency

SMCS understands that, as humans, we can remain unaware of our biases without making conscious effort to see them. In his Vanderbilt University study, Richard Milner observed that, “Prospective teachers from European-American backgrounds saw themselves as “normal” and believed that students from diverse backgrounds needed to be knowledgeable and accepting of the beliefs held by the dominant culture. They did not identify a connection between diversity and learning (Milner, 2005).

In collaboration with the Equity Council, administration will begin equity training during the implementation year to cultivate cultural and linguistic competency. The head of school will work with the Equity Council and the School Board to implement the action plan set forth by the Equity Council, training teachers and keeping discussion alive through the weekly faculty staff meetings and professional development days.

Early Identification Techniques for Learning Differences

Faculty will also be given training during professional development days, in coordination with the Special Education Director, techniques to use in the classroom to identify learning differences early. Teachers will be trained in Multi-Layered Systems of Support. The Special Ed Director will communicate the school’s clear plan of identifying, testing, and working with the special education students (including gifted students) with the special education staff and the lead teachers. The Special Education Director will maintain an updated list of special needs for each class, to provide for specialty or substitute teachers. The school will encourage and support a presence in all New Mexico Special Education conferences offered through NMPED and OSE.

SMCS will also voluntarily take a second dyslexia screening test at the end of second grade. We do this because we feel because of our developmental method, not enough standards will have been taught at the beginning of first grade when we take the test to accurately assess if a student is dyslexic or not. In this way, no child’s needs are left unidentified by any teacher working with those students.

Training to Support ELL Students

All teachers, but especially specialty subject teachers, are encouraged to take SIOP training to help meet the ELLs in their classroom. Also, teachers will be encouraged and financially supported by the to-be-formed Supporting Foundation to become TESOL certified.

Teacher to Teacher Mentoring

Within the School. Sun Mountain Community School will provide a formalized mentorship for novice teachers that is structured in accordance with NMAC 6.60.10.8. Our novice teacher mentorship will focus on developing level one teacher competencies identified in the NMAC 6.69.4.12.(B). A full description of our mentorship program can be found in Section II.D.(4) Mentorship Plan.

Furthermore, the Pedagogical Director will observe each teacher, each year. They will offer support according to what they observe and will be continually available as a resource for teachers with any questions of curriculum, classroom management, or issues with a particular student. It will be the Pedagogical Director’s job to offer support for all teachers, including, but is not limited to the following:

- instructional material development
- culturally and linguistically responsive teaching practices for all diverse learners
- structuring conferences with parents and families

- understanding, developing and responding to formative and summative assessments
- structuring individualized conferences with students
- additional observation and feedback from a mentor teacher
- collaboratively lesson planning/internalization

Between Schools. The Sun Mountain Community School will participate in state and district educational programs with other LEAs. We strive to create a community of educators in Santa Fe by inviting community onto our campus and becoming part of community events whenever possible, particularly when in reference to sharing ideas in education.

Scope and Sequence Support

Although a teacher is expected to work out of freedom, they are not expected to reinvent the wheel each year. The Founding Team will create a day by day scope and sequence for the grades K-8. Block outlines will be given for each year and each block will be broken down into a day by day content and activities. The common core standard for that subject matter will be added to each day with suggestions and assignments in how to present and practice it. Teachers make choices within the scope and sequence as long as the core standard is met and the integrity of the Waldorf educational program is upheld. Teachers will have examples of completed main lesson books from that year to inspire them.

Teacher Life-Long Learning

The curriculum in Waldorf education is so broad and deeply evolving, teachers must dedicate themselves to continual learning (Core Principle #7). In addition to continually deepening the pedagogical picture of the human being. Teachers have their own strengths and weaknesses. Every summer they take up new material to teach; each has their own skill set whether in singing, reading music, juggling, knitting, drawing, and painting, etc.; accordingly, each will eventually have to instruct their students in a range of activities. Expanding and learning is part of the job. In that way, teachers model life-long learning and striving for their students. Kendra Cherry calls this the observational learning of learning (Cherry, 2023).

Waldorf teachers are expected to be continually pursuing their own self-development. This can be approached in any number of ways, including self-reflection and written self-evaluation (described in Section II.D.(4) Evaluation Policy and Procedures).

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Morgan, H. (2009) , *What Every Teacher Needs To Know To Teach Native American Students*, The Catholic Sun Newspaper.

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F. (2) Yearly Calendar and Daily Schedule

Provide a yearly calendar and daily schedule (length of school day, instructional blocks, and breaks) that **completely comply** with all state requirements and ensure **effective, successful** implementation of the academic program/curriculum for the proposed age group the school intends to serve. ***If anticipating serving K-5 Students and or an extended day program, please describe and include in a Year 2 calendar.

The Sun Mountain Community School (SMCS) is a community of families and educators dedicated to cultivating the intellectual, social, emotional, physical and consciousness capacities of the developing human being. Our mission is to educate the whole child, using an age-appropriate approach to content and skills based on principles of Waldorf Education and the work of Rudolf Steiner. Our students engage in rigorous academics, develop connections to the natural world and moral discernment, and achieve an appreciation of themselves and others.

MEETING ALL NM PED REQUIREMENTS

The Sun Mountain Community School will meet all minimum hour (total instructional time requirements laid out in NMSA 22-2-8.1. These include:

- Kindergarten, full-day programs, five and one-half hours per day or 990 hours per year
- Grades one through six, five and one-half hours per day or 990 hours per year
- Grades seven through twelve, six hours per day or 1,080 per year
- Up to 33 hours of the full-day kindergarten program may be used for home visits by the teacher or for parent-teacher conferences

- Up to 22 hours of grades one through six programs may be used for home visits by the teacher or for parent-teacher conferences
- Up to 12 hours of grades seven through twelve programs may be used to consult with parents to develop next step plans for students and for parent-teacher conferences.
- 6 hours and 36 minutes.

YEARLY CALENDAR

Figure 24 - 2025-2026 school calendar

Sun Mountain Community School						
2025 - 2026 School Calendar						
August '25						
M	Tu		Th	F	S	
				1	2	
4	5	6	7	8	9	
11	12	13	14	15	16	
18	19	20	21	22	23	
25	26	27	28	29	30	
g. instructional days <u>14</u>						
n-instructional Day <u>3</u>						
September '25						
Su	M	Tu	W	Th	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				
Sept. instructional days <u>21</u>						
Non-instructional Day <u>0</u>						
October '25						
Su	M	Tu	W	Th	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	
Oct. instructional days <u>22</u>						
Non-instructional Day <u>0</u>						
November '25						
M	Tu	W	Th	F	S	
						1
3	4	5	6	7	8	
10	11	12	13	14	15	
17	18	19	20	21	22	
24	25	26	27	28	29	
v. instructional days <u>16</u>						
n-instructional Day <u>0</u>						
December '25						
Su	M	Tu	W	Th	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			
Dec. instructional days <u>15</u>						
Non-instructional Day <u>0</u>						
January '26						
Su	M	Tu	W	Th	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
Jan. instructional days <u>17</u>						
Non-instructional Day <u>2</u>						
February '26						
M	Tu	W	Th	F	S	
2	3	4	5	6	7	
9	10	11	12	13	14	
16	17	18	19	20	21	
23	24	25	26	27	28	
i. instructional days <u>19</u>						
Non-instructional Day <u>0</u>						
March '26						
Su	M	Tu	W	Th	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				
March instructional days <u>20</u>						
Non-instructional Day <u>0</u>						
April '26						
Su	M	Tu	W	Th	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		
April instructional days <u>19</u>						

Non-instructional Day <u>2</u>	Non-instructional Day <u>0</u>	Non-instructional Day <u>2</u>
May '26	June '26	July '26
M Tu W Th F S	Su M Tu W Th F S	Su M Tu W Th F S
4 5 6 7 8 9	7 8 9 10 11 12 13	5 6 7 8 9 10 11
11 12 13 14 15 16	14 15 16 17 18 19 20	12 13 14 15 16 17 18
18 19 20 21 22 23	21 22 23 24 25 26 27	19 20 21 22 23 24 25
25 26 27 28 29 30	28 29 30	26 27 28 29 30 31
g. instructional days <u>18</u>	June instructional days <u>20</u>	Aug. instructional days <u>0</u>
Non-instructional Day <u>2</u>	Non-instructional Day <u>5</u>	Non-instructional Day <u>5</u>

Figure 25 - 2026-2027 school calendar

Sun Mountain Community School						
2026 - 2027 School Calendar						
August '26	September '26	October '26				
M Tu W Th F S	Su M Tu W Th F S	Su M Tu W Th F S				
3 4 5 6 7 8	6 7 8 9 10 11 12	4 5 6 7 8 9 10				
10 11 12 13 14 15	13 14 15 16 17 18 19	11 12 13 14 15 16 17				
17 18 19 20 21 22	20 21 22 23 24 25 26	18 19 20 21 22 23 24				
24 25 26 27 28 29	27 28 29 30	25 26 27 28 29 30 31				
31						
g. instructional days <u>13</u>	Sept. instructional days <u>22</u>	Oct. instructional days <u>19</u>				
Non-instructional Day <u>3</u>	Non-instructional Day <u>0</u>	Non-instructional Day <u>2</u>				
November '26	December '26	January '27				
M Tu W Th F S	Su M Tu W Th F S	Su M Tu W Th F S				
2 3 4 5 6 7						
9 10 11 12 13 14	6 7 8 9 10 11 12	3 4 5 6 7 8 9				
16 17 18 19 20 21	13 14 15 16 17 18 19	10 11 12 13 14 15 16				
23 24 25 26 27 28	20 21 22 23 24 25 26	17 18 19 20 21 22 23				
30	27 28 29 30 31	24 25 26 27 28 29 30				
		31				
v. instructional days <u>17</u>	Dec. instructional days <u>14</u>	Jan. instructional days <u>19</u>				

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Yearly calendar that identifies the following:

- Annual start date and end date
- Teacher professional development days and times
- School-wide assessment periods
- School days, holidays, and partial days
- Teacher-parent conferences

For calendar with full keys, see

Attachment 14 - 2025-26 School Instructional Calendar, and

Attachment 15 - 2026-27 School Instructional Calendar

Professional Development

Each year, our elementary school teachers will receive 26 days of professional development (PD), including 13 summer PD days before the start of the school year, four (4) days during the school year, and two (2) days at the end of the school year. We will provide ample professional and financial support in helping teachers improve their instructional skills through our summer PD, as well as ongoing support throughout the school year. Full-day PD will occur inside of the standard work day. PD days are indicated on the calendar in marigold.

PD hours will support our teachers in:

- 1) **Proficiency in Waldorf teacher training methods.**

- 2) **NMPED core curriculum and best practices, and testing success.**
- 3) **Culturally and linguistically inclusive education.**
- 4) **Special education identification and best practices.**

School-Wide Assessments

Our calendar marks fall, winter, and spring benchmark windows for assessments taken in that time.

School Days, Holidays, and Partial Days

The SMCS annual calendar includes 180 instructional days. Our calendar breaks down the days by month, including the number of instructional days per month. Holidays and breaks are indicated on the calendar in red. Vacation choices in the calendar are primarily aligned to that of the surrounding district, anticipating that our families may have other children enrolled in surrounding district schools. We do not intend to have partial school days, with the exception of our weekly abbreviated day when we dismiss students at 1:50pm; this abbreviated instructional day is a full school day per New Mexico State Statute.

Community and Parent Teacher Conferences

Parental involvement at school is a core part of Sun Mountain Community School. Parental involvement has direct correlation with improved academic performance (The Annie E. Casey Foundation, 2023). Our opportunities for parental involvement are included in our Goal #2 (section I.B) to educate the whole community. This includes four parent teacher engagement events , two parent teacher conferences, and educational speakers. Furthermore, parents are welcome to our four annual community festivals as well as class plays and musical performances. Parent-teacher conferences are indicated in purple. Community festivals are indicated in brown.

Professional Development Fridays

We will use an abbreviated Friday schedule to provide for weekly staff professional development after student dismissal. Our abbreviated Friday schedule will enable teachers to consistently study the academic achievement of students and classes during professional development time. Our Friday schedule will incorporate our weekly Community Meeting, a time to focus on study, faculty support and community festival planning.

Our students attend school from 8:00 am until 3:35 pm Monday through Thursday, with an abbreviated Friday schedule dismissing at 1:05 pm. Every day our doors will open at 7:45am for Faculty Gathering and children’s free play in the yard. Monday through Thursday, Sun Mountain students will receive 360 minutes of instruction. Each Friday, students are dismissed at 1:05pm for teacher professional development, and students still receive 265 minutes of instructional time on these days. Differences in the daily schedule for full and partial days;

- Daily/Weekly Schedules with:
 - Instructional times
 - Break times
 - Start and end times
 - **See Attachment 16 - Daily/Weekly Schedules**
- Partial Day Schedules
 - **See Attachment 17 - Partial Day Schedules**

EDUCATIONAL PROGRAM SUPPORTED BY CALENDAR & SCHEDULE

Economy of Teaching for Optimal Outcomes

The calendar of a Waldorf school is carefully constructed on a daily basis, a weekly basis, and through the year to align content presentation with natural rhythms of the students and the seasons. Waldorf methodology takes great care to teach the right thing at the right time and the calendar is a central part of that careful planning. When this is done well, students are hungry for the content given them and they take it in eagerly and with less struggle. In Waldorf methodology, this is called the *Economy of Teaching*.

Daily Schedules

Daily schedules use the “in-breath/out-breath” approach of high focus, head-centered activities followed by more relaxing, heart- and hand-focused activities. The bulk of academic classes occur in the morning when students are most alert and able to focus. Ideally, these are the extended, immersive content given in the main lesson and math classes. Midday classes, ideally, are more heart-centered, like world languages and painting classes. Afternoon classes are much more successful when they offer students the chance to use their hands and move their bodies, like movement, handwork, woodwork, and clay classes. These engagements tend to allow more socializing, honoring students' needs for that.

Honoring our developmental approach, schedules shift slightly in middle school. Research shows (Kelley et al, 2017) that in adolescence “optimal wake and sleep times are shifted 2–3 h later in the day, and yet this group is still required to conform to education start times more appropriate to young children and older adults.” Ideally, middle schoolers would be allowed to start school later in the day. Because of siblings, however, elementary students will have a common start time. We shift some of the more physical and social classes to the beginning of the morning so students have a chance to wake up before they have to engage in their most academic classes.

The Weekly Schedule

The weekly schedule is also rhythmic, striving to meet the different learning styles of each child. The Waldorf approach uses a three day content presentation rhythm that speaks to the whole child. A teacher typically will overlap a day of that rhythm so that she moves through the three day rhythm twice in a week. See Section I.A.(3) “Main Lesson” for more about this rhythm.

The weekly schedule includes a wide range of specialty classes, reaching different learning styles and different types of intelligences. Although the layout of classes change as the years progress, they include handwork, woodwork, Spanish language, movement, painting, and orchestra class.

The Yearly Calendar

Our Thematic Approach to education uses blocks. These blocks are carefully scheduled for the year (see **Attachment 18 - Example of a Block Schedule**). The Pedagogical Director will consider what block will build on the next. Class trips affect the block schedule. The astronomy block is often taught before the 6th grade camping trip, for example. The 5th grade Greek history is going to be taught before the traditional, multi-school event, the Pentathlon, in coordination with the movement teacher's preparing students for participation. The 3rd grade Jewish Mythology block is often taught

just before Hanukkah. The life of Prophet Muhammad in 6th grade is often taught just before Ramadan and Ancient India in 4th grade is often taught at the time of Diwali. Botany is not taught in the winter because the garden wouldn't have plant life to explore.

Sun Mountain Community School will take care and consideration into planning the yearly academic schedule, choosing the most natural time for an immersive experience in that subject, thus creating engaged students and an economy of teaching.

SUPPORTING OUR STUDENTS AND COMMUNITY

Student Support

Students' academics in 5th through 8th grade will be supported with weekly "extra mains". These are classes held by the main lesson teacher to review material that had been presented but testing shows needs more instruction. It is also a time for students to finish main lesson book work and assignments where they will need extra support from the teacher.

Community Support

The early start of the proposed daily calendar will support parents who need to be at work at 8 am. The playground will open at 7:45. SMCS will offer after school child care until 5 pm. This allows working parents to have a safe place for their children to spend time until they finish work. We will also offer transportation to and from school with a single bus route the first year. Future additional routes will be determined based on student needs.

We will offer summer camps for students in order to utilize the campus and keep the community together outside of the school year.

References for this section:

Kelley, P., Kelley, J., & Evans, M.D.R., (2017). Identifying the Best Times for Cognitive Functioning Using New Methods. *Frontiers in Human Neuroscience*. 11:118

F. (3) Effects of the Educational Philosophy, Instructional Method, Yearly Calendar, & Daily Schedule

Provide a **clear, comprehensive, and cohesive** explanation of how the educational philosophy, instructional methods, yearly calendar and daily schedule will be effective with the anticipated student population.

The Sun Mountain Community School (SMCS) is a community of families and educators dedicated to cultivating the intellectual, social, emotional, physical and consciousness capacities of the developing human being. Our mission is to educate the whole child, using an age-appropriate approach to content and skills based on principles of Waldorf Education and the work of Rudolf Steiner. Our students engage in rigorous academics, develop connections to the natural world and moral discernment, and achieve an appreciation of themselves and others.

ANTICIPATED STUDENT POPULATION

Demographic Information

Figure 26 - Demographics of students in the SFPS (Santa Fe Public Schools, 2023).

Demographics	SFPS
White	15.5%
Black	1%
Asian or Asian/Pacific Islander	1.6%
Hispanic/Latino	79.6%
American Indian or Alaska Native	0.2%

Anticipated Educational Proficiency

Figure 27 - Language Arts achievement levels for Santa Fe District and New Mexico. (Santa Fe Public Schools, 2024)

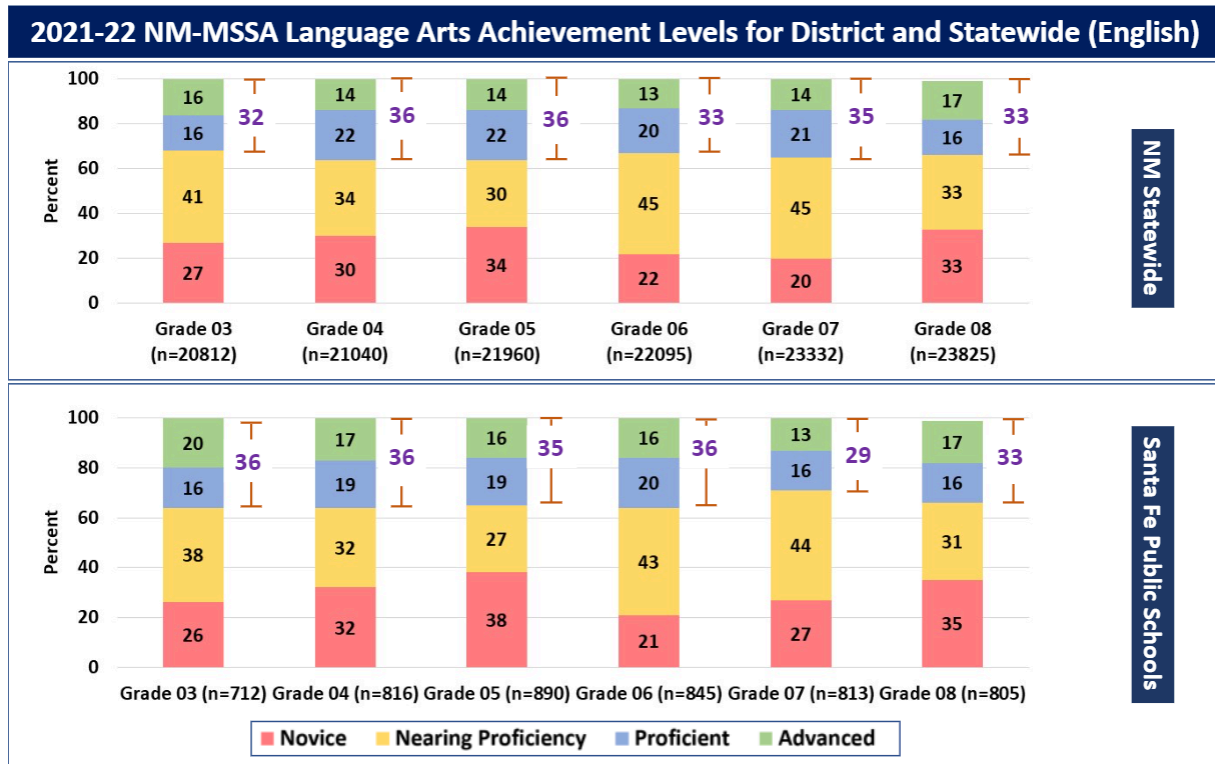
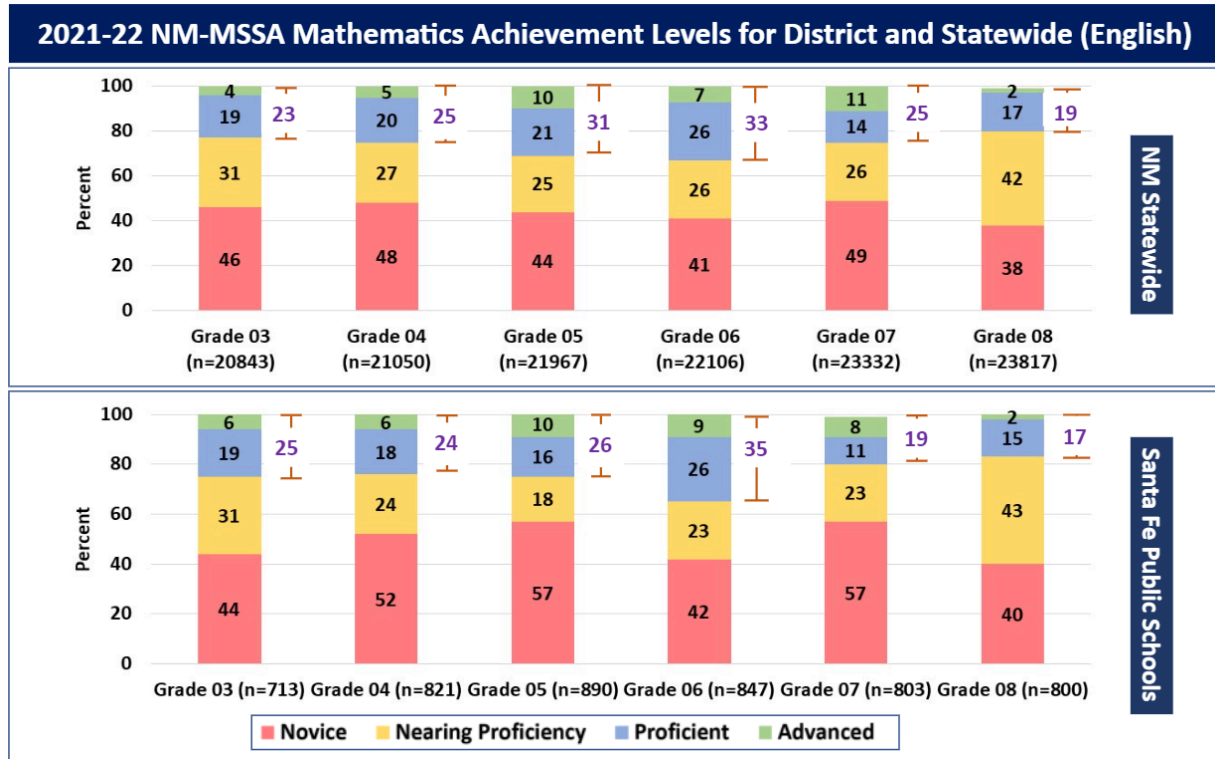


Figure 28 - Math achievement levels for Santa Fe District and New Mexico. (Santa Fe Public Schools, 2024)



Attendance and Truancy Trends

Figure 29 - New Mexico absentee rating averages, 2022-23

	Absentee Rating NM State Average, 22-23
Tier One	54%
Tier Two	16%
Tier Three	16%
Tier Four	14%

English Language Proficiency

Figure 30 - Percentage of English Language Learners for Santa Fe District (SFPS 2023)

English language learners in SFPS	16.2%
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At-Risk Populations

Figure 31 - Different at-risk populations in Santa Fe (SFPS 2023)

Eligible for federal free and reduced lunch	45.5%
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% of enrolled students who are homeless:	3.1% (NCHE, 2024)
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Special Educational Needs

“In New Mexico public schools, one out of every five students receives special education because they are identified as having a disability or being gifted,” (SPED Progress Report Program Evaluation Unit Legislative Finance Committee November 14, 2023). Special education enrollment has grown by 10 percent in the past decade, particularly among students with specific learning disabilities such as dyslexia. Given these findings, SMCS can anticipate the number of special education students in our school according to our growth plan: approximately 20 in year one, 36 in year two, and 40 in years three through five. We will not be able to identify our gifted students until after spring testing in the first year.

Special Factors Influencing the Makeup of Student Population

The campus that Sun Mountain Community School will lease from the former Santa Fe Waldorf School is in the 87508 zip code. The median household income in that zip code is almost \$88K and 8.7% live below the poverty line. 54% are white and 41% are hispanic. These numbers do not align with the demographic researched directly above. As seen in the graph below, to best align our student population numbers with the demographics researched above, outreach activity priorities were directed toward the 87507 area code. In our implementation year, the SMCS aims to organize a single bus route to begin our school year. This bus route will be laid across the 87507 zip code. In this way, we hope to balance our demographics between the demographics of the different area codes that will comprise our populations.

Figure 32 - Various demographics of Santa Fe by area code, (Census Reporter, 2023.)

Zip Codes	87508	87501	87505	87507
Median household income annually	\$87.7K	\$77.4K	\$77.3K	\$60.6K
Percentage living below poverty line	8.7%	8.1%	10.5%	16.6%
Percentage of Hispanics	41%	30%	40%	70%
Percentage of Caucasians	54%	64%	52%	29.3%
Have a Bachelor's Degree or higher	47.5%	61%	52.5%	23%

THE NEEDS OF AT-RISK YOUTH

At-risk youth include students who may experience homelessness, incarceration, teenage pregnancy, serious health issues, domestic violence, transiency (as in the case of migrant-worker families), or other challenging conditions. Many places in this document have already spoken to how the Waldorf educational philosophy and instructional methods specifically meet the needs of at-risk students.

Here a specific areas to reference:

- Section I.A.(1) Happier Students gives research based evidence how Waldorf is effective as a **trauma-informed curriculum**.
- Section I.A.(3) **Arts-integration program**, give research based evidence how art programs benefit social emotional learning, conflict resolution, and student health.
- Section I.A.(3) Looping: “What are the benefits?” gives research based evidence showing looping has extra benefits for low-income students, creating predictability and security where it may not otherwise exist, allowing students the sense of safety to excel at school.
- Section I.A. (3) “Benefit of Storytelling to indirectly address emotional problems in the classroom” gives research based evidence how the daily technique of storytelling can help students facing emotional hardships.

Strong academic benefits for students across the community spectrum, but particularly for special populations. The methods of instruction show particular benefit to special populations such as bilingual and multicultural students, and IEP students. When comparing Alice Birney Waldorf to Sacramento City Unified School District, grades 5-8), “...a greater value added to student achievement both in English language arts and in mathematics was associated with Alice Birney Waldorf relative to other district schools. The average added value associated with Alice Birney Waldorf ranged from 0.19 to 0.24 standard units in English language arts and from 0.05 to 0.09 standard units in mathematics. These effects were greater for traditionally underserved students: Latino and African American students, and socioeconomically disadvantaged students. For instance, for the Latino and African American students and those enrolled in free or reduced lunch programs, the added value associated with the school ranged from 0.23 to 0.24 standard units in ELA relative to that of other similar students in their district.” (SCOPE, 2015. p.g 76).

The Twenty Years and Counting study reflected similar trends. “(C)ompared achievement scores on national assessments of 4th graders in the Urban Waldorf School to scores in a neighboring school with a similar demographic profile. Overall there were a greater number of students achieving higher levels of performance in the Waldorf schools.” (Twenty Years and Counting, 2012).

MEETING STUDENT’S NEEDS THROUGH THE DAILY & YEARLY CALENDAR

Impact of Educational Philosophy

SMCS’s educational philosophy is rooted in our mission, our core values, and our mission goals. The youth of Santa Fe need an educational option that teaches through age appropriate content, that is delivered in depth, and with a number of entry points from different subjects. The young people need the Renaissance type education that Waldorf-inspired pedagogy offers. They crave to see how the natural world outside their door step leads to complex scientific questions and ideas, how the origin stories of humans all over the globe share overlapping themes in their folklore, and that thinking, feeling, and doing are all a part of education and becoming an ethical and impactful adult.

Impact of Instructional Methods

The Instructional Methods of the Sun Mountain Community School respect the developmental stage, the imagination, and the sacredness of childhood. Waldorf instructional methods bring core curriculum content with artistic beauty through loving, trained humans without, for the most part, computers. The students then get to practice that core curriculum content through their head, hands,

and heart, with their movements, artwork, and their deep curiosity for the world. Teachers enliven the educational program through their personal connection with the material, present it to students with understanding of just what they need at their stage of development, and in a rhythm that provides the safety from which to strive, and builds esteem, imagination, and wonder for the world. All of these elements create the child our mission describes, connected to the natural world, respectful to themselves and others, self-confident, and capable of moral discernment.

Impact of Yearly Calendar and Daily Schedule

Our yearly calendar reflects that Sun Mountain Community School is not only a place of academic rigor and accountability, it is also a place for students to celebrate their sense of belonging to their community. Across Santa Fe Public Schools, 32% of students are proficient in reading, 18% are proficient in math, and 30% are proficient in science. Our community needs a different approach. Our daily schedule assures that students experience learning as a way of life. When learning is diverse, deep and appropriately rigorous, student success increases, as seen in comparison testing scores of public Waldorf schools. Our yearly calendar gives students the stability to experience the seasonal school year rhythm. Community festivals that mark the seasons remind students that their academic striving is supported by the community and the natural world.

References for this section:

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SPED Progress Report Program Evaluation Unit Legislative Finance Committee November 14, 2023

G. Special Populations

This includes those with Individualized Education Programs (IEPs) English Language Learners (ELLs), Native American Students, Hispanic Students, and Bilingual and Multicultural educational needs to improve student outcomes. Please ensure that you adhere to state obligations as outlined in the consolidated Yazzie and Martinez Lawsuits.

Is the school protecting the rights of students with special needs? (Note: These provisions include only students with disabilities.) (*PEC-Charter-Performance-Review-and-Accountability-System-2019 PDF* (webnew.ped.state.nm.us))

- The school is in 100% compliance with the Special Education Bureau identified indicators. (34 CFR § 300.600 (a)(2) and Subsection F of 6.31.2.9 NMAC.)

- The school has not been the subject of a due process hearing that resulted in a finding of noncompliance during the current school year.
- The school has not been cited for noncompliance with applicable federal and state special education rules and regulations as the result of a state-level parental complaint during the current school year.
- The school is in compliance with all terms of any corrective action plan that resulted from a state-level complaint.
- The school has received no OCR complaints determined to be valid and demonstrate a students' rights were violated. (NMSA 22-8B-4)
- Review of IEP files during site visits to insure compliance with state and federal law regarding servicing students with special needs

G. (1a) Special Education

G. (1a) Provide a **clear, cohesive, and comprehensive** description of how the proposed school will provide required instructional services/supports to students with IEPs.

ENTER APPLICANT RESPONSE HERE:

The Sun Mountain Community School (SMCS) is a community of families and educators dedicated to cultivating the intellectual, social, emotional, physical and consciousness capacities of the developing human being. Our mission is to educate the whole child, using an age-appropriate approach to content and skills based on principles of Waldorf Education and the work of Rudolf Steiner. Our students engage in rigorous academics, develop connections to the natural world and moral discernment, and achieve an appreciation of themselves and others.

“The special education teachers feel that Birney’s holistic approach to education serves special needs students better than in many other public schools. Many of the children who are fully included in the classroom at Birney would likely be separated in a communicative handicapped class in a different school. In one class a Down Syndrome child is fully integrated into the class where he receives a considerable amount of assistance from a full inclusion aide, the teacher, and even the other children in the classroom. The special education teachers also collaborate with the classroom teachers to identify ways to best support each of the students, providing guidance to teachers on how to scaffold the learning for individual students. The teachers love working with the special education teachers and aides because they see how “present they are with the kids. They love the kids.”

(SCOPE, 2015, p.g. 42)

PLAN FOR INSTRUCTIONAL SERVICES/SUPPORT FOR IEPs

Overview

The Sun Mountain Community School (hereafter referred to as SMCS) is a community of families and educators dedicated to cultivating the intellectual, social, emotional, physical and spiritual capacities of the developing individual. This education approach is based on the pedagogical principles of Rudolf Steiner through an age-appropriate approach to NM standards-based content and skills from early childhood through eighth grade.

Incoming and current SMCS students who have been designated as eligible for Special Education will receive support based on their Individual Education Programs (IEPs). Students who are gifted will receive enrichment to meet their needs and support their continued growth and development. The Multi Layered Systems of Support (MLSS) will be followed for students who need additional support or for whom there are concerns about the possibility of learning challenges and the need for further student support.

SMCS anticipates serving a spectrum of student needs and will be prepared to meet those needs through the use of Waldorf pedagogically enhanced teaching and student support systems, standards-aligned curriculum, and staff professional development and training. SMCS is committed to providing all students with special needs a Free and Appropriate Public Education (FAPE) in their Least Restrictive Environment (LRE). Through defined systems and responsibilities and with adherence to all relevant state and federal statutes, including New Mexico State Statute and Administrative Code (NMAC.6.31.2), Title II of the Americans with Disabilities Act of 1990 (ADA), the Individuals with Disabilities, Education Act (IDEA), Section 504 of the Rehabilitation Act of 1974 (504), and the Every Student Succeeds Act of 2015 (ESSA), we will ensure all teachers and students are supported to ensure that students with special needs will be served.

Development of the Individualized Education Program (IEP)

Every student who is eligible to receive special education and related services has an Individualized Education Program (IEP). This must be developed before the student can receive special education services. The IEP is developed by the IEP team, which consists of the parent, student (if appropriate), at least one special education teacher, at least one regular education teacher, an administrator or LEA representative, and others who may provide services to the student, such as a speech therapist or occupational therapist. The parent or school may invite other individuals who have knowledge or expertise about the student, and the school will provide a translator if needed. The meetings are designed to not only complete the documentation and make a plan for the student, but include parent feedback and the chance to bring ideas, requests, clarifying questions, and concerns to the team.

At the IEP meeting, the student's educational needs are discussed, and a number of other factors must be considered. Prior to the meeting, the IEP team sends an IEP Survey to the student's teachers to get direct feedback on the student's present level of functional and academic performance and feedback on annual goals and short-term objectives (if the student has functional needs). The student/parents also complete a survey to give updated information for the student profile. These allow for the efficient update of goals, accommodations, and other aspects of the document, including the amount of special education and related services the student will receive. The IEP team will also determine any supplemental aids or services that the student will need for support in the regular education class and how the student will participate (regarding approved accommodations) in required district and statewide assessments.

The IEP sets forth, in writing, the SMCS commitment of the resources necessary to serve the student. The IEP also serves as a review of student progress and the IEP team can reconvene to review and revise the IEP if it is deemed necessary. New information, like an evaluation or modification of goals in a related service, can also allow for a revision of the IEP and an addendum. All changes and processes are recorded in events and documented in the Prior Written Notice (PWN) of each IEP. Note that the procedures listed here are only an overview and do not document all processes and timelines associated with the IEP development and implementation that the school will follow. SMCS

procedures reflect the recommendations and best practices from the Public Education Department's Policies and Procedures IEP Guide (2014).

Placement in Special Education and LRE

After the team has finished the IEP, they then determine where the specialized instruction will be delivered. The inclusion model at SMCS follows NMPED recommendations that the student be served in the Least Restrictive Environment (LRE) appropriate for that child, and to the maximum extent, students with disabilities are educated with students who are not disabled. Depending on the needs of the student, a placement includes a full-continuum of services and could range from merely being monitored or supported in the regular education classroom to receiving specialized instruction in a resource class for part of each day to being a part-time student in a special education classroom to home and hospital services. Determination of placement is an IEP team decision and is based on where the student can receive a free appropriate public education in the least restrictive environment. The placement is usually determined at the same meeting that the IEP is developed, and the school will make every effort to honor the needs of each individual student's placement while following the LRE.

The IEP team, including the parents, need to meet at least annually to review the student's IEP and develop a new IEP with new annual goals and services. A review of the student's placement and services will also occur. Every student with an IEP at SMCS will be reevaluated at least every three years through a diagnostic evaluation or a current performance-based evaluation. The purpose of the re-evaluation is to determine if the student is still eligible for special education services through an Eligibility Determination Team (EDT) that might meet with the IEP team. When behavioral concerns are noted, SMCS will develop appropriate and effective Behavior Intervention Plans (BIP) through a Functional Behavioral Assessment (FBA). SMCS will ensure IEP development at SMCS considers any related services required to meet the needs of our students with behavioral issues.

Parental Rights in Special Education

Parents have the right to disagree with the SMCS members of the IEP team at any point in the process. In the event that this occurs, the Individual with Disabilities Education Improvement Act (2004) includes a number of due process rights and compliance processes, including mediation, that are outlined in the law. These rights are explained in the NM Special Education Procedural Safeguards for Students with Disabilities and their Families (2020), which are provided to parents at least annually. A parent may request a copy of their Procedural Safeguards at any time in the process and they will be provided electronically in English or Spanish with each IEP.

Instructional Supports for Gifted Students

Sun Mountain Community School values the neurodiversity of all students, and as an intentionally diverse school with a commitment to ensuring that our approach to academic instruction is equitable, we are prepared to address the needs of students with gifted services in a manner that adheres to the Gifted Education in New Mexico Technical Assistance Manual (2019). The Waldorf approach also encourages balancing the intellectual capacities of gifted students with activities that challenge other aspects of the student's being.

Similar to our approach of supporting students with special needs, SMCS will ensure that IEP development prioritizes meeting the unique needs of the student identified as gifted. Depending on the needs of our gifted and general student population, the school will consider separate enrichment courses, subject acceleration, cluster grouping, independent study projects, and pull-out groups, with general education enrichment being the baseline system. For students identified as gifted, SMCS is

prepared to offer a continuum of placement options to ensure IEP services are delivered in the most effective manner.

MLSS Systems of Prevention

The SMCS approach to identifying students with disabilities begins with all students interfacing with systems of monitoring and prevention that are embedded in the NMPED Multi-Layered Systems of Support (MLSS). The core components of MLSS are: universal screening, data driven instruction and decision-making, core instruction and evidence-based interventions, informed and effective school leadership and school-wide systems, collaborative process for support, positive school culture and climate, overall student wellness, and family engagement. MLSS processes will follow recommendations from the NM Public Education Department's MLSS Manual (2020), and SMCS is committed to applying this framework through school systems and structures that are also informed by the core principles of the Alliance of Public Waldorf education. SMCS believes that the MLSS system provides a framework that can be adapted to the Waldorf method successfully, and that instructional practices of Waldorf education will enhance goals of the MLSS process.

Layers of Support

SMCS proposes to adapt universal screening, in addition to implementation of core aligned curriculum and the culture of collaborative inquiry to meet the guidelines of best MLSS practices and implementation. Child observations on the SMCS level will include academic, non-academic, and perception data, and collaborative processes among faculty and Special Service providers.

SMCS faculty will adapt and implement MLSS layers of support: Layer 1 supports (universal interventions), Layer 2 of supports (targeted interventions) and Layer 3 supports (intensive interventions) within the framework of the school as part of the child-centered study that faculty regularly engages. The MLSS process will interface with Special Education and can lead to identification of students who need further modified or specialized instruction and curricula. Interventions are developed through faculty meeting time that is dedicated to student progress, and the MLSS process data will inform how teachers will work specifically with each student. Progress monitoring for social, developmental, or academic issues is a key component of the three layers of support and the more focused interventions that accompany them. The SMCS dedication to these processes as part of the larger mission of the school will lead to a systematic approach that is supported by child, family, and community practices that incorporate Waldorf methodology as is appropriate.

Systems of Identification

For children entering kindergarten, SMCS will utilize ASQ Ages and Stages Questionnaire, a parent-centered developmental screening tool that pinpoints development for children ages 0 to 5 ½ years of age. ASQ will be used at the beginning of the school year to identify children who might benefit from Child Find screening. Child Find is the affirmative, ongoing obligation of states and local districts to identify, locate, and evaluate all children with disabilities residing within the jurisdiction who are in need of special education and related services.

The Multi-Layered Systems of Support (MLSS) process provides a responsive support structure for students who are struggling and require academic, social, emotional, and/or behavioral interventions to succeed. The SMCS school-based MLSS team includes members of the Student Assistant Team (SAT). The SAT is a school-based group that provides additional education and behavioral support to students experiencing difficulties that prevent them from progressing in core instruction. The SAT group is student specific, and can include the SPED coordinator, a teacher, a parent, and other support from related services, counseling, or an outside agency. The SAT's responsibilities include

collecting and reviewing student progress data, identifying and documenting interventions and their effects, and referring students to Special Education for evaluation. SAT procedures will follow recommendations from the Public Education Department's MLSS Supplemental Guide for Student Assistance Team (2019).

Student Assistance Team Procedures

When a teacher has a specific concern regarding a student's success, they can complete an SAT referral packet with support from the Special Education Coordinator. Criteria would be that the student is not making adequate progress and that there is documentation of having gone through a process of MLSS consideration and interventions. The screening processes of MLSS layers should provide data for this process and could help establish a baseline for future student goals and process.

The referral packet contains descriptions of academic, social, emotional, and/or behavioral concerns, documentation of interventions and progress monitoring results, parent feedback and input, and classroom observations of the student by teachers. After reviewing the packet and determining if the packet meets criteria, the Special Education Coordinator will invite the students, teachers, parents/guardians, and other SAT members to a meeting. Consideration of all data could lead to a Functional Behavior Analysis (FBA), Academic Intervention Plan (AIP), a Behavioral Intervention Plan (BIP), or to other interventions. This meeting, which could also lead to a referral for evaluation, is documented in a Prior Written Notice (PWN).

After interventions have been implemented according to the student AIP or BIP and progress monitoring data has been collected for a period of 8-12 weeks, the Special Education Coordinator will schedule a follow-up SAT meeting. The team could decide to continue interventions, revise interventions, or refer for special education or gifted evaluation. Note that these processes will be adapted if the student presents as clearly having a disabling condition, or if the parents specifically request an initial Special Education evaluation directly from the school.

Eligibility Determination

When consent is signed, SMCS will contract with our diagnosticians to properly direct the evaluation into the appropriate realm (learning disability, psychological issues, or gifted). Once the evaluation has been conducted, an Eligibility Determination Team (EDT) will use the data made available from the evaluation report and the SAT to determine possible eligibility for special education and related services, gifted education, or a continuation of regular education and the MLSS process. Depending on recommendations from the diagnostician, a meeting with the team could lead to the creation and implementation of an Individualized Education Plan (IEP), a gifted IEP, more specific information to contribute to the MLSS, or recommendation for 504 process.

Multidisciplinary evaluations and the EDT process will adhere to the procedures and criteria outlined in the New Mexico Technical Evaluation and Assessment Manual (2017) and the Gifted Education in New Mexico Technical Assistance Manual (2019) as well as any additional updated guidance released by our state and federal agencies.

Section 504 of the Rehabilitation Act

Sun Mountain Community School recognizes its legal responsibility to ensure that no qualified person with a disability shall, on the basis of disability, be excluded from or denied the benefits of participation in SMCS programs, or otherwise be subjected to discrimination under any program of SMCS. A student who has a physical or mental impairment that substantially limits one or more major

life activities, has a record of such an impairment, or is regarded as having such an impairment, is eligible for protections under Section 504.

If the student is found to be eligible for accommodation under section 504, the 504 team shall be responsible for determining what, if any, accommodations or services are needed to ensure that the student receives a free and appropriate public education (“FAPE”). In developing the 504 Plan, the 504 team shall consider all relevant information utilized during the evaluation of the student, drawing upon a variety of sources, including, but not limited to, assessments conducted by the Charter School’s professional staff. Though not part of Special Education, it is noted here that SMCS will follow the NMPED Section 504 Guidance for Schools manual (2020) and assemble a team, document processes, and create accommodations similarly to SMCS Special Education procedures.

Considerations for English Language Learners SMCS is committed to ensuring that students who are English Language Learners are not over-identified as students with special needs due to limited English language proficiency. Several structures and processes within the school will ensure over-identification does not occur. First, SMCS Multi-Layered Systems of Support require teams to begin considering the interaction of language needs and learning difficulties from the earliest layers of interventions. Second, the SAT process requires data analysis and for students who are English Language Learners, this process would also include closer consideration of skill acquisition in one’s first language, and then in English as the second language. Finally, when a student is referred for a special education evaluation, SMCS will adhere to the best practice guidance in the New Mexico Technical Evaluation and Assessment Manual (2017) to ensure that limited English language proficiency does not unfairly affect the process of identifying students for special needs services. When necessary, school meetings will include an interpreter and documentation provided to families will be translated into the parents’ primary language.

SPECIAL EDUCATION STAFFING

SMCS provides a range of support for children with diagnosed needs through a mix of inclusion, push-in, pull-out, and case management services based on a model of least restrictive environment (LRE) for services applied. The school will employ and/or contract with educators who provide special education academic or behavioral support and gifted enrichment support, including the Special Education Coordinator, teachers/case managers, instructional aides, resource specialists, diagnosticians, and related service providers for speech/language, occupational therapy, social work, and physical therapy as needed. Special education teachers and aides will provide push-in and pull-out support and hold small groups for reading, writing, math, and gifted enrichment support as is deemed appropriate and staffing other environments will be considered as needs arise.

The special education teachers work with the coordinator to build schedules for services that interfere minimally with the children accessing aspects of daily instruction in the regular classroom environment. In the LRE model the needs of the child are balanced with the needs of the community, as student inclusion in a regular education setting is the goal as often as it is appropriate. Special Education teachers and aids are trained to effectively work with teachers and students on standards-based instructional support according to NM Common Core State standards (2010) or DLM Essential Elements standards (2014) for more severe cognitive disabilities through the inclusion model. In cases where special education services are provided specifically by a special education teacher, those environments can occur with small group instruction, times in skills classes, or in a separate 1:1 environment. SMCS inclusion services will be as non-intrusive and effective as possible, and educators will try to minimize the impacts of pull-out services on core academic classes. Pull-out

services in special education-specific environments for students with disabilities or gifted enrichment will be creatively and effectively delivered.

The following chart offers targets for total student population and estimates for special education populations based on an 18% average. Percentages for contract services are entirely speculative and will depend on the needs of the population.

Figure 33 - Estimates of SMCS 5 year Special Education staffing and contract services

School Year Anticipated	Special Education Population	SMCS Staffing Projections in FTE Percent	SMCS Related and contract Services (based on need)
2025-2026	108 Students 19 Special Ed Students (18% estimate)	Special Ed Director 1.0 Special Ed Teacher/ Interventionist 1.0 Educational Assistant .8 Gifted Endorsement .2	Social Worker .03 Speech Language: .05 Occupational Therapist: .02 Educational Diagnostician
2026-2027	176 Students 32 Special Ed Students	Special Ed Director 1.0 Special Ed Teacher/ Interventionist 1.6 Educational Assistant 1.0 Gifted Endorsement .3	Social Worker .04 Speech Language: .06 Occupational Therapist: .03 Educational Diagnostician
2027-2028	208 Students 38 Special Ed Students	Special Ed Director 1.0 Special Ed Teacher/ Interventionist 1.8 Educational Assistant 1.5 Gifted Endorsement .5	Social Worker .06 Speech Language: .08 Occupational Therapist: .05 Educational Diagnostician
2028-2029	208 Students 38 Special Ed Students	Special Ed Director 1.0 Special Ed Teacher/ Interventionist 1.8 Educational Assistant 1.5 Gifted Endorsement .5 Pathologist	Social Worker .2 Speech Language: .3 Occupational Therapist: .2 Educational Diagnostician
2029-2030	208 Students 38 Special Ed Students	Special Ed Director- 1.0 Special Ed Teacher/ Interventionist 1.8 Educational Assistant 1.5 Gifted Endorsement .5 Pathologist	Social Worker .2 Speech Language: .3 Occupational Therapist: .2 Educational Diagnostician

Training and Support for Teachers and School Staff

Sun Mountain Community School’s leaders are committed to providing the training, coaching, and on-going support for staff members needed to deliver high-quality special education instruction and services. The school will encourage and support a presence in all New Mexico Special Education conferences offered through NMPED and OSE, such as the Director’s Academy, as well as Waldorf related conferences and PD, such as offerings through Center for Anthroposophy, and Alliance for Public Waldorf Schools. Kindergarten teachers will additionally participate in WECAN (Waldorf Early Childhood Association of North America) sponsored educational opportunities, as well as some others in the field of Waldorf methods.

SMCS believes that sharing in the structures, systems, and philosophies of both Waldorf and PED worlds are essential in being a balanced institution that bridges a major independent school movement with the institutional support and compliance with state policies and procedures. Professional development and the growth of the individual to meet the changing landscapes of childhood and adolescence are a big part of Waldorf Education. Members of faculty and staff will carry forth this commitment to personal development through offerings for teachers, parents, and staff in diverse and creative ways, and constantly bring renewal to the school and its students.

Faculty and staff who deliver special education services will receive professional development in Waldorf methods, such as crossover principles of Waldorf Educational Support and elements of the Extra Lesson, so that aspects of these methodologies may be adapted within the framework of MLSS and supporting inclusion students. Waldorf teachers are encouraged to attend conferences and renewal activities, and may have to complete Waldorf teacher training as part of their employment contracts. In Waldorf, personal development and professional development are closely related and always encouraged for the betterment of the school’s mission and growth.

Figure 34 - Primary responsibilities relating to Special Education

Role	Primary Responsibilities Relating to Special Education
Head of School (HOS)	The SMCS Head of School will serve as the primary Local Education Agency representative (LEA) for the school. HOS will ensure that special education programs and services are adequately housed, funded, and staffed and that professional development opportunities are available. The Administrator is the interface with the Board regarding all special education matters. An Administrator will attend IEP meetings as needed.
Special Education (SPED) Director	The SPED Director oversees the function of the Student Support Department to ensure that IEPs are developed and services delivered in a manner that complies with all state guidelines. Tasks include IEP oversight, monitoring data collection and management, overseeing the SAT process and evaluations, ensuring proper state reporting, managing testing accommodations, and managing department personnel. The SPED Director is an experienced teacher familiar with the curriculum that has a current NM Special Education license.
Special Education Teachers / Interventionists	Special Education Teachers/Interventionists will coordinate classroom support as case managers for a group of students. They will provide direct instructional services outlined in IEPs, work with general education teachers to ensure students have access to the general education curriculum and appropriate accommodations, participate in the development of IEPs, and facilitate effective communication with teachers, students, and families of students on their caseload. Special Education teachers must be licensed in the state of New Mexico.
General Education Teachers	General Education Teachers will participate in Special Education through providing direct classroom support to students and collaborating with special education teachers on content area expertise. They will be responsible for implementing IEP accommodations and modifications in their classes, attending IEP meetings as needed, communicating student progress to case managers, participating in the SAT process for students with suspected disabilities, and completing relevant data tracking related to IEP goals. General Education Teachers must be trained in Waldorf pedagogy.

Educational Assistants/ Educational Behavioral Health Assistants EBHA	Educational Assistants will work with special and regular education teachers to support students with special needs across a variety of settings. They will provide accommodations and modifications support in the classroom, contribute to data tracking, be available for parent communication, and support services specifically identified in an IEP.
Social Worker (SW)	The Social Worker will document social development of a child with a disability, provide group or individual social counseling, partner with parents and other community providers to help address the student's needs, write, evaluate, and update IEP goals, assist in developing positive behavior outcomes, create SW evaluations as needed, and track service minutes. This will be a contracted service position as determined by our students' IEP service minutes.
Speech Language Pathologist (SLP)	The Speech and Language Pathologist will provide speech and language services outlined in student IEPs across various settings, work to identify students with speech or language impairments, create and report on IEP goals, and track student progress. This will be a contracted service position as determined by our students' IEP service minutes.
Occupational Therapist (OT)	The Occupational Therapist will provide OT outlined in student IEPs across various settings, aim to improve fine motor and independent living skills, create and report on IEP goals, and track student progress. This will be a contracted service position as determined by our students' IEP service minutes.
Physical Therapist (PT)	The Physical Therapist will provide any physical therapy services that are identified as a related service on a student's IEP, create and revise IEP goals related to gross motor development, track student progress to goals, and create evaluations as needed. This will be a contracted service position as determined by our students' IEP service minutes.
School Nurse	The School Nurse will support in the administration of any school health service or school nurse services that have been designed through a student's IEP to ensure they receive FAPE. The Nurse will also oversee the 504 process documentation.
School Diagnostician	The Diagnostician will be responsible for evaluating students who need initial or evaluations or re-evaluations for learning disabilities, creating and presenting documentation for SPED eligibility, contributing to the SAT process, and interpreting evaluation results when needed. This will be a contracted service.
School Counselor	The school counselor(s) will interface with the SPED Department around behavioral health, as IEP referrals might include counseling as a step towards establishing social work services. Counselors will also give IEP feedback in surveys or at an IEP meeting, and will offer ideas around behavioral goals if appropriate.
Other Services	These specialists will be contracted if needed: Orientation and Mobility Specialists for blind or visual impairment, Audiologist for hearing issues, Behavior Specialist for Functional Behavior Assessment (FBA) or Behavior Improvement Plans (BIP) are needed. Movement teachers are trained in spatial dynamics and their work with the students from 1st through 8th grade offer help to all children how to avoid movements that drain and cause strain, in order to move towards greater strength and revitalization. Eurythmy offers therapeutic training in body awareness.

TIMELINE, BENCHMARKS, & PEOPLE RESPONSIBLE

Timeline for developing a working SMCS Special Education Manual will begin with approval of this document, with full implementation completed by the launch of school. The process will involve assembling a team to be led by an interim Special Ed Coordinator, interim administrator, board member, regular education teacher, and other special education professionals that can be brought in by the school team. The manual will document procedures and systems needed for full compliance and the further development of methodologies for inclusion that will utilize Waldorf methods of delivering special education support in a variety of environments. This document will also document specific discipline processes for school and families.

Capacity of the School District to provide Special Education Services and FAPE

Free and Appropriate Public Education

SMCS supports the rights of all students with disabilities to receive a Free and Appropriate Public Education (FAPE). SMCS recognizes this as an important and developing social issue, and as a school, is committed to ensuring that students from around the city have access to the school, that the community within the school has tools for self-improvement, and that systems and structures within the school can promote successful communication and collaboration. SMCS will follow all guidance from the Office of Special Education Programs (OSEP), the New Mexico Public Education Department (NMPED), and other leading professional organizations, like the Alliance for Public Waldorf Education and the National Association of School Psychologists (NASP), to ensure that the necessary steps to provide FAPE and best practices of these institutions are manifest.

SMCS will offer a free and appropriate public education through ensuring that our special education services meet the unique needs of our students, that students and families feel supported and heard, that IEP documentation is well created, that students have access to related services, that students receive appropriate accommodations and modifications, that students will function in their least restrictive environment, and that students, families, and professionals collaborate effectively towards the larger goal of uplifting individuals, institutions, and society through public education.

Process for tracking this protected population's progress and services

Tracking and communicating this population's challenges and successes will occur through the school's special education database, assessment data from short-cycle assessment, and the human connections between students, parents, teachers, and case managers is one aspect of the data stream. This data can be provided to the board as part of the school's reporting process.

- Parent and student concerns can be addressed directly with the teacher or case manager
- Teacher and case manager share concerns with faculty in child-study meetings
- Documentation of meetings allows access to a regular record of student and faculty progress
- Grade reports will have written comments as well as an assessment of student progress
- Consolidated data through the school's testing platform can be regularly reflected on
- IEP progress goals will allow a reflection on a student's process over quarterly and yearly review cycle

Though systems will be in place to gather quantitative data, a main feature of this school will be the holding of the image of the child as a developing human being. The ability to see aspects of the data

as part of a larger whole, reflected in more qualitative data from student participation in intellectual, emotional, and physical activities, is an important feature of Waldorf education.

G. (1b) Monitoring Special Education Students

Provide a **clear, cohesive, and comprehensive** description of how the proposed school will regularly evaluate and monitor the progress and success of special education students

EVALUATING & MONITORING PROGRESS & SUCCESS OF SPED STUDENTS

Overview

The school will rely on different streams of data to accomplish responsible monitoring of students and elements of the program that should be assessed for progress at regular intervals during the year. One stream is more quantitative in nature, and involves numbers and statistical trends SMCS can gather from state testing, enrollment statistics and student numbers in state reporting, demographic information about the student body, special education statistics, diagnostic testing results, community surveys, and other streams of quantifiable data that will help school professionals understand student progress, program effectiveness, and areas where the school can make adjustments to be more effective. Data tracking in this realm will rely on database functions to present one picture of progress.

The more qualitative side is the interpretation of phenomena facing the school, like student progress by teachers, advisors, and other professionals that students make contact with. This kind of data might be assessed on report card comments, discussed with families, assembled in MLSS responses, or gathered anytime the picture of the whole human being will help understand better the complexities of student or school progress. This dedication to the less quantifiable aspects of human endeavor is characteristic of Waldorf education, and SMCS will work to analyze and utilize this stream in equally useful ways. Together, these streams of data will give valuable information to analyze and help indicate the direction school trajectory will follow.

Attainment of IEP Goals

Setting and monitoring goals is an essential data stream in a relationship-based school like SMCS. Establishing IEP goals will be a process that is part of both initial establishment of services for incoming or newly identified students, and annual review of students with established IEPs from within the school or elsewhere. SMCS views IEP goals as a documentation process designed to bring the expected milestones of our age-appropriate curriculum and capacities and needs specific to each unique student together through the IEP process. Generally, IEP goals will be reviewed and adjusted annually. Teachers will report progress towards goals quarterly, and parents will be informed of this progress quarterly. The goals themselves will be reflected on each year by faculty through IEP surveys that also give a picture of current progress. Faculty input on establishing and revising objective and measurable goals are an essential part of this system, as is keeping the goals present in any discussions about the student. Academic, functional, and related services goals will be crafted with specific, developmental, and standards based objectives that build towards annual goal attainment and indicate student progress. All goals and short-term objectives are ultimately tracked according to the progress monitoring schedules developed in collaboration with families and school leaders. All data related to progress towards IEP goals will be summarized and reported to the SMCS Teachers'

Council and School Board as required by the school Collaborative Governance model, by identifying what percentage of students are making sufficient progress towards annual IEP goals at the end of each quarter, and what percentage of IEP goals have been attained versus not attained in a given year.

Regular Interval Progress Monitoring

SMCS will comply with all state and federal guidelines regarding progress monitoring of students with special needs. All students will have access to a re-evaluation once every three years, unless regular data collection indicates that it should be done sooner. Once re-evaluation results are ready to be shared, the eligibility team will reconvene to determine if the student continues to meet eligibility criteria for special education services. If the student continues to meet criteria for special education services, a new IEP will be developed. All IEPs will be reviewed annually to verify if goals have been met. If goals are achieved earlier, the IEP team can reconvene the IEP at any point to create new goals. Similarly, the IEP team can reconvene at any point to add, modify, or eliminate goals depending on the student's needs and what the team believes will ensure the student makes adequate progress. Faculty will have multiple ways to access IEP goals and keeping these goals at the forefront to teachers' work will best serve this process.

When IEP teams create goals, they will also create progress-monitoring schedules. The majority of progress monitoring schedules will follow an established frequency to align with MLSS practices. This approach will ensure that staff members are able to have data-driven conversations about student progress during weekly faculty or section meetings. It will ensure that parents and families are receiving regular updates regarding their child's progress towards the goals that have been collaboratively developed. Regardless of the goal area (academic, social, behavioral, functional), SMCS will use reliable methods to monitor progress on a regular schedule. Monitoring progress for students with special needs will ensure that SMCS teaches responsively and honors the individual effort of each individual student.

Staff Responsibilities

Staff roles and responsibilities, summarized in Section I. G. (1a) Special Education, indicate the primary staff members responsible for developing goals and progress monitoring schedules, those responsible for collecting it, and those responsible for analyzing it, and those reporting to other staff members, the student, and their family. The Special Education Coordinator is the person responsible for managing and monitoring all special education processes, including oversight of state reporting and reporting to the administrative team about student and program progress. General education teachers, special education teachers, educational assistants, and related service providers are all responsible for the individual tracking of progress monitoring data for annual IEP goals and short-term benchmarks. The teacher or service providers develop progress-monitoring schedules at the time of the IEP with the guidance from the Coordinator and approval from the student's family and other IEP team members. Data will be recorded using established tracking systems that can be monitored by the Coordinator and admin team. Finally, each student's special case manager will be responsible for establishing and maintaining strong communication with each student's family and teachers, and will ensure that a student's progress to IEP goals is shared at regular intervals agreed upon at the time of the IEP. Faculty will meet bi-monthly in a Special Education department meeting throughout the year to regularly check in about these processes.

Engaging and informing students and families

Aside from the reporting already discussed and explained in previous sections, SMCS will actively create and maintain a place for itself and all of its participants in the community. This happens through developing systems that bring parents into the school as volunteers or participants in Waldorf

Education. It is a model based on the development of the human being, meaning not only the students, but also faculty, staff, parents, and even members of the larger community participate in personal and collective growth. This development happens every day through the education of the students, but is also facilitated through faculty professional development, the seasonal festival life of the school, parent forums, community offerings, and use of the campus for community based initiatives.

Grade reporting, including Kindergarten Developmental Progress Record (KDPR) if so determined by the school leadership, teacher comments, and parent-teacher conferences are also important aspects of reporting that help parents really know the sides of their children that the teachers regularly see. Quarterly reports also provide commentary, and the grade reports are intentionally organized to convey information about academic skills as well as content mastery and behavioral progress. Parents, teachers ultimately learn about the developmental model through the students, and that is fitting, as they are at the center of the Waldorf school movement.

Program Evaluation

SMCS is committed to ensuring that special education programming results in achieving the intended outcomes of IEPs for students with special needs and students with gifted services. Prior to the start of each school year, in collaboration with families and staff members, several annual goals are created by the special education department and a process for achieving those goals will be developed by the SPED Coordinator. These goals might be to enhance procedural effectiveness in an area like reporting or could be structural, like building better systems within faculty work spaces or develop effectiveness of the tools that Case Managers use.

Throughout the school year the department reports on progress in department meetings, and meeting minutes are shared with the admin team; biannually the SPED Coordinator meets with the board for a report. At the end of each academic year, SPED will conduct an effectiveness evaluation to examine functionality of key aspects of the special education program. An annual review will be conducted by the Head of School in collaboration with relevant school staff and contracted services providers. Results of the program effectiveness evaluation will be reported to the SMCS School Board at the end of the academic year.

The following areas will be included in the annual effectiveness evaluation:

Compliance Evaluation - Compliance with state and federal guidelines will be examined:

- Percentage of timelines met regarding evaluation and annual IEP dates
- Number of instructional service minutes per student delivered versus the number of minutes identified in each student's IEP
- IEP folder review to ensure progress-monitoring data has been collected, service minutes documented, communication logs updated, etc.

Student Outcomes Evaluation - Student outcomes will be examined to evaluate programming impact:

- Analysis of SPED student progress in state testing
- General effectiveness of IEP goals created or updated
- Percentage of IEP goals attained across all goal areas
- Analysis of any disparities between all students and students with identified special needs or gifted identification

Evidence of Bias Evaluation - The following areas will be examined to identify how bias may be impacting identification of students with special needs and the quality of services delivered:

- Examination of the over- and under-representation of English Learners, economically disadvantaged students, as well as students who identify as Black, Hispanic, or Native American
- Analysis of demographics represented at different levels of services and settings
- Percentage of special education enrollment compared to local public schools
- Parent satisfaction levels measured through an annual survey for parents and families of students with special needs

Effectiveness MLSS Evaluation - The following areas will be examined to determine the effective of our approach to MLSS at increasing academic and behavioral success at school:

- Analysis of the percentage of students identified for each layer of service through universal from Fall to Spring to determine effectiveness of all layers of support
- Demographic analysis of students represented at each layer of service
- Demographic analysis of students referred for an evaluation to determine special education eligibility, with a particular attention to English Learners, and students who identify as Black, Hispanic, or Native American

TRACKING MISSION SUCCESS

The Sun Mountain Community School (SMCS) is a community of families and educators dedicated to cultivating the intellectual, social, emotional, physical and consciousness capacities of the developing human being. Our mission is to educate the whole child, using an age-appropriate approach to content and skills based on principles of Waldorf Education and the work of Rudolf Steiner. Our students engage in rigorous academics, develop connections to the natural world and moral discernment, and achieve an appreciation of themselves and others.

Assessment of the success of the mission of SMCS will be considered regularly through the daily contemplation of school ideals and the successes and struggles that are arising from its journey as an institution. Because Waldorf principles view the education of the developing human being as a lifelong process, stakeholders within the school have a culturally active incentive to develop themselves and their unique capacities. The school provides for this development through community enrichment events, festival life, professional development based in Waldorf principles, study sessions on Steiner's philosophy, reflective time in faculty meetings; other possibilities exist to allow students, families, educators, support staff, and anyone interested to engage in a deeper look into the act of educating themselves and others. Parts of the mission like this are a challenge to quantify and assess for progress, but regular reflection of these aspects of the school's own path of development can allow the school's progress to be seen through a different lens of development. It is up to each individual to pursue what development is best for that person and to what extent development is pursued. The encouragement of this is an important aspect of the school for both the individual and the collective.

Systems and processes described in this application ensure that structural aspects of Special Education compliance and best practices are present in the daily function of the school. Structures for data collection and analysis are also a daily function of the school, offering an evolving picture of effectiveness as the school pursues its mission. With structural aspects in place, quantitatively tracking, measuring, and ensuring student success is more approachable and can be assessed to show

progress, growth, and areas in need of improvement. In this way, the school itself grows through the mission statement as its community grows, an assumption or ideal that can be inferred through the success of student populations discussed here. The structures built to support these more vulnerable populations will allow Special Education students to achieve an educational experience commensurate with that of their regular education peers. The education itself, being dedicated to each student's gifts, may even provide for these students (and maybe their teachers) to discover something unique about their challenges and take that discovery in the direction of their choosing. In this way, the school's mission can be tracked, measured, and ensured through this and the larger population of all SMCS students.

G. (2a) English Learners (ELs)

Provide a **clear, comprehensive, and cohesive** description of how the proposed school will provide required curriculum, and instructional services/supports to students identified as ELLs.

The Sun Mountain Community School (SMCS) is a community of families and educators dedicated to cultivating the intellectual, social, emotional, physical and consciousness capacities of the developing human being. Our mission is to educate the whole child, using an age-appropriate approach to content and skills based on principles of Waldorf Education and the work of Rudolf Steiner. Our students engage in rigorous academics, develop connections to the natural world and moral discernment, and achieve an appreciation of themselves and others.

INTRODUCTION

Sun Mountain Community School will comply with all applicable legal federal/state mandates for English Learners ("EL"), including long-term English Learners and students at risk of becoming long-term English Learners, as they pertain to annual notification to parents, student identification, placement, program options, EL and core content instruction, teacher qualifications and training, reclassification to fluent English proficient status, monitoring and evaluating program effectiveness, and standardized testing requirements. SMCS will implement policies to assure proper placement, evaluation, and communication regarding ELs and the rights of students and parents. SMCS will meet all requirements of federal and state law relative to equal access to the curriculum for English Learners.

In alignment with our mission to teach the whole child and the whole community, Sun Mountain Community School will form their ELL program, like the Special Education program, with an inclusion model. We believe that ELL students will find a supported transition into English at our school, especially in the early grades. With kindergarten working out of imitation of the teacher versus heavy verbal instruction, and with the use of melodic instruction, this offers a prime environment to learn the English language in a classroom through song and play. The "morning rhythm" (the daily beginning of the main lesson throughout the grades), where students participate in synchronized movements and coordination games, repeating songs and verses every day, allows the ELL student a daily entry point and esteem builder into the language. In fact, in our Spanish education program, we teach the Spanish language to students in exactly the same way, beginning by repeating songs, verses, and games, learning first language cadence and tonality, and through imitation. So, ELL students are learning English in the classroom in the same way English speaking students are learning Spanish.

Furthermore, as an inclusion model, we will encourage teachers to work towards their TESOL certificate, so that when possible, students can receive their 45 minutes of daily ELL instruction within the classroom and stay with their “whole community”. We will research and advertise trainings for teachers in order to make timely choices to enhance their careers. A future Supporting Foundation and any Title III fundings will also offer TESOL training among the supplemented or free professional development options for teachers to pursue.

“Although Birney serves very few English language learners (about 30 students during 2014–15), the school does provide those students who are fourth grade and older with additional support through an after school tutoring program. One of the reasons the school has so few designated English language learners above fourth grade is because of its high redesignation rate. Children who indicate on the state-required home language survey that they are an English language learner are invited to attend an after school tutoring program three days a week. Even after a child graduates from the program they can still attend for an additional two years. The program is co-run by the English language coordinator/Spanish teacher and an intervention teacher.” (SCOPE, 2015 pg. 33).

ELL Standards

1. Identify quickly.
2. Provide English learners with a language assistant program.
 - EL services and programs must be educationally *sound in theory and effective in practice*.
 - EL programs must be designed to enable ELs to attain both English proficiency and parity of participation in the standard instructional program *within a reasonable length of time*.
 - LEAs *must offer EL services and programs, until ELs are proficient in English and can participate meaningfully in educational programs without EL support*.
 - Additionally, LEAs *must provide appropriate special education services to ELs with disabilities* who are found to be eligible for special education and related services.
3. Addressing the needs of LTEL (long term english learner, 6 years identified as an EL without changing status).
 - We have a formal definition for Long Term English Learners.
 - We have designated annual benchmark expectations for English Learners by number of years in United States schools and by progress towards English proficiency.
 - We have conducted our own inquiry (including analysis of data, student interviews, and focus groups, review of cumulative file histories, and classroom observations) to develop a deeper understanding of our own Long Term English Learner population.
 - We have an English Learner Master Plan that includes descriptions of research based program models for different typologies of English Learners, including a designated program and pathway for Long Term English Learners. Site and district leadership are knowledgeable about the diversity of the English Learner enrollment in our district, including the different needs of newcomer students, normatively progressing English Learners, and Long Term English Learners.
 - Our data system enables us to analyze English Learner achievement data by length of time in United States schools and by English proficiency levels. We can analyze data longitudinally to assess issues of program consistency and long-term program impact for our English Learners.

- We identify “Long Term English Learner candidates” in fourth grade and develop a catch up and program consistency plan for those students.

IDENTIFYING ELL STUDENTS

Home Language Survey

All parents of students entering the public school system for the first time must complete a Language Usage Survey (LUS). Each student should have only one LUS completed during his or her public education career in the United States. The LUS is kept in the student’s cumulative file and transfers as part of the student record to the schools that the student attends. Sun Mountain Community School will administer the home language survey to the parent/guardians upon a student’s initial enrollment into a New Mexico public school. This will be made available in the language(s) spoken by the parent/guardians. Our home language survey will ask families to provide information about:

1. the language(s) is (are) spoken in the home
2. the language(s) the child first learned
3. the language(s) the parent/guardians use most frequently when speaking with the child
4. the language the child uses most frequently at home

After initial enrollment and within thirty days or 60 days before the start of the school year, SMCS will assess the English proficiency of students whose parents/guardians indicated that English is not the primary language in the home.

See Attachment 19 - Primary/Home Language Survey.

Multi-Layered System of Support Framework (MLSS)

MLSS is a holistic intervention framework that guides educators, those closest to the student, to intervene quickly when students need additional support. The MLSS framework reflects the support that the classroom teacher, school, family, and health and wellness staff offer toward readying students to experience academic and behavioral success in school resulting in students being ready for success. MLSS will be used by teachers to identify a number of different challenges a student might face, including if a student is struggling due to a lack of language proficiency.

INSTRUCTION AND SUPPORT TO DEVELOP EL PROFICIENCY

Strategies for English Learner Instruction and Intervention

SMCS is committed to appropriately and adequately fulfilling the needs of English learners. We believe that our overall pedagogy and philosophy is a natural fit for working with culturally and linguistically diverse populations of EL students (ELs). As mentioned above, recent research from Stanford looking at the success of students in a public Waldorf school have found that there are fewer ELs at the higher grades because these students have been re-designated early on. This development of English Language Proficiency is attributed to the developmentally appropriate approach of learning to read, write, and speak used in education that is guided by the Core Principles of Public Waldorf Education. For instance, students will be taught to write before they can read and speak, and listening is considered equally critical components of our curriculum. (SCOPE, 2015).

Sheltered Instructional Observation Protocol (SIOP) (Echevarria et al. 2012) Strategies (Vogt et al. 2016) SMCS intends to use to support English Language Development (ELD) are:

- Connecting prior knowledge
- Using a slower rate of speech, clear enunciation, and an animated tone
- Using repetition to promote understanding
- Providing opportunities for pre-reading and reading aloud
- Allowing sufficient wait time
- Using students' primary language as often as possible
- Implementing pair work
- Modeling expected behaviors
- Using lots of visuals and realia
- Context embedded
- Manipulatives and hands on
- Using a controlled vocabulary, using cognates, and avoiding the use of idiomatic language
- Activating prior knowledge
- Limiting teacher-centered lectures
- Focusing on the meaning, not the form
- Games and Cooperative learning
- Graphic organizers
- Preview-review
- Comprehensible input
- Direct Instruction
- Joint Construction
- Coached Construction
- Monitoring
- Art and Drama
- Alternative assessment
- Provide a version of the test with simplified language.
- Simplify directions
- Read test questions aloud
- Provide matching activities
- Allow extra time to complete tests
- Allow students to respond orally rather than in written form.
- Use portfolios to authentically assess student progress.
- Using gestures and facial expressions
- TPR (Total physical response)
- Not limiting multicultural activities to "Heroes and Holidays", but utilizing everyday opportunities
- Providing lots of time for SSR (self-selected reading) and pleasure reading

RESPONSIBILITIES, PD, AND SUPPORT FOR FACULTY AND STAFF

Narrative of How Strategies will be Implemented

SMCS believes its approach is complementary to the Sheltered Instructional Observation Protocol (SIOP) (Echevarria et al. 2012) and will rely on this method to empower ELs to increase their English Language Development. The SIOP framework is an evidence-based framework proven to help English Learners master the English Language. SMCS's teachers will be provided specific opportunities to professionally develop their understanding of the and enter their classrooms confident in their

abilities to teach ELs. SIOP is a part of the TESOL training which SMCS will promote to its teachers and, if possible through a future Supporting Foundation, offer funding for additional professional development. Because the SIOP framework suggests that in addition to other subjects, the delivery of sheltered instruction in Art, Music, and Physical Education, for students at the beginning levels of English Language acquisition SMCS is especially equipped to deliver the sheltered instruction. This is because Art, Music, and PE which involves **games and cooperative learning** are interwoven throughout the entire educational approach and therefore provide constant opportunities for Sheltered Instruction. SIOP suggests that these subject areas are the most accessible opportunities for sheltered instruction because they are usually highly **context-embedded** areas. At secondary stages of English Language Development Sheltered Instruction is suggested to be delivered in the subject areas of science and social studies.

Again, because our educational approach is interdisciplinary and developmental, ELs will experience multiple opportunities throughout the day to receive Sheltered Instruction by **connecting and activating prior knowledge** while also having the opportunity to **model expected behaviors** of teachers. Furthermore, SMCS focuses on the deep cognitive benefits of experiential and phenomenological learning which provides further opportunities for high **context-embedded** areas of instruction. So, teachers provide **comprehensible input** in subjects that in a traditional classroom, such as math or English Language Arts, are delivered with **visual aids, manipulatives, movement, story, song, and art that follows a direct instruction, joint construction, coached construction, and monitoring framework**, giving ELs ample opportunities for Sheltered Instruction. Indeed, we are confident ELs in our high **context-embedded** environment, similarly to ELs in other private or public Waldorf educational environments, will likely exceed expectations in their ability to acquire the English Language will ultimately likely be re-classified as English Language Proficient earlier than if they would in a traditional classroom setting.

Because of this important goal, SMCS is committed to ensuring that our specialty instructors of Music, Handwork, Games (PE) and World Languages are given professional development training in SIOP. This is critical because while ELs receive the high **context-embedded** opportunities with their main classroom teacher, it is important to further capitalize on opportunities in the high **context-embedded** areas found throughout an ELs student's day.

In Kindergarten storytelling that culminates with the children re-enacting the story offers opportunity for **drama** which is helpful for ELs. Melodic instruction helps with language acquisition through song, chanting, call and response and other song-based activities. Later, in the elementary years, students have multiple opportunities to participate in **drama**, both during the rhythm group work done at the beginning of class as well as class plays. Group work at the start of Main Lesson that involves **TPR** in which students recite song and verse allows for ELs to sing and speak in a group without being expected to fully understand the content. During this time as well as elsewhere, the teacher has the opportunity to use **gestures and facial expressions** to help ELs comprehend word meaning and sounds. The teacher will also specifically deliver the story at the end of the main lesson with a **controlled vocabulary, using cognates, and avoiding the use of idiomatic language**. Often rhythm work using bean bags, clapping or rhythm sticks will be **implemented in pair work** to strengthen ELs understanding. Choral work is a fundamental approach to helping ELs acquire the English Language and is therefore a natural component of our approach.

Furthermore, because much of the instruction is delivered through narrative from the teacher, but the idea of engaging students to discover concepts through teacher facilitation and **limiting teacher centered lectures** is a critical component of public Waldorf education, ELs will be in a quasi-English-immersion setting to begin with. In terms of learning secondary languages, immersion is

a successful method. ELs benefit from our educational model of first learning to listen, then speak through recitation in the early grades because the pressure to read is taken off all students by asking them to copy words and phrases before they are expected to read them. The words and phrases students copy come from a story, verse, song, or poem the students have already learned to recite and likely know by heart. This allows all the students, including ELs, the **opportunity for pre-reading and reading aloud** words and phrases they know and are confident reciting. As students progress in their ability to read and write they are engaged to summarize content in their own words where there is a **focus on the meaning and not the form**.

Also, helpful to ELs is our block teaching approach. Students will engage content repeatedly and consistently over three to five weeks slowly building their understanding. For example, in first grade the language arts curriculum is delivered through a fairy tale narrative. In a traditional block, the students will hear the story **using a slower rate of speech, clear enunciation, and an animated tone** in stages over the course of many days and be asked to recount the previous section before moving on. The students will have an opportunity to act out the story and play different roles through **drama**, which gives ELs a way to engage and build confidence in their social and communicative abilities. In the earlier grades the students would learn their respective parts through learning specific phrases orally together while also allowing for natural creativity to be developed. As well, the students will practice their writing by copying phrases and ultimately summarizing the key points of the story. Using techniques like **graphic organizers** is prevalent in the early grades. There is an opportunity for the students to read the phrases aloud and with help when needed. There is usually a song or songs that are specific to the block that the children learn and continually add to until it is many verses long. A cornerstone of public Waldorf education is singing, recitation, rhythmic work that invites learning through **using repetition to promote understanding** is valuable for all students and particularly ELs. As well, students are provided **lots of time for Self-Selected Reading and pleasure reading**. In fact, reading is framed as a pleasurable activity that students are encouraged to delight in.

During math blocks students **utilize manipulatives** and teachers rely on a hands-on approach. In kindergarten and first grade, “Fairy Stones,” or “Dragon Tears” are used to learn counting, grouping, and visually seeing the four processes. Throughout the main lesson the teacher relies on sources of **realia and visual aids** that increase ELs English language development. Furthermore, allowing **sufficient wait time** is critical when the teacher asks students to contribute their understanding of spelling, answers to math problems, reading comprehension, and other content.

Especially during the Spanish specialty block, EL students whose native language is Spanish are taught through immersion **using students’ primary language**. Furthermore, in the Spanish class, as well as other specialty and main lesson, there is no limiting of **multicultural activities to “Heroes and Holidays”**, but rather the teacher **utilizes everyday opportunities** through Spanish fiestas, and other activities to have students share their multi-cultural heritage with the class by dressing up, learning a song or story, or special food. Because of our diverse heritage students will have the opportunity to share with their classmates’ aspects of their culture from a range of diverse cultures.

Preview and Review is an important component of the framework of public Waldorf education as there is a definite and determined time allowed for both **Previewing** and **Reviewing** in every main lesson. For instance, after rhythmic work, students engage in review of content learned the day prior. During this time, through dialogue and interaction the teacher will draw out and elicit a deeper understanding of material and concepts acquired the previous day. Often, the students display a sense of “Ah Ha!” after having sufficient time to digest and internalize the previous day’s content. Only after the teacher is sufficiently satisfied that the students have acquired the concepts will they move to the “New” stage or “Preview” stage. During this time, visuals, stories, games, and the other

methods described in this narrative are used to introduce students to new concepts. This stage does not yet concretely identify the new concepts for the students as it is the goal of the teacher that the students discover them on their own through experiential activities and work. Some may quickly grasp the new material while others over the course of the next day or days will begin to concretely appreciate the new material that has been **Previewed** during the **Review** time of Main Lesson.

Alternative assessments are an important component of our program to help students gain confidence that supports further learning and ELD. Ways instructors will do this is by providing a **version of tests with simplified language, extra time to complete tests, and/or reading test questions aloud for students.** Teachers will also **simplify directions** for main lesson work, **provide matching activities, allow students to respond orally rather than in written form, and use portfolios** in the form of main lesson books to **authentically assess student progress.**

Figure 35 - Strategies to support ELL middle school students

<p>Checking students' comprehension of the content:</p> <ul style="list-style-type: none"> ● Use sentence strips ● Set up dialogue journals between teacher and student ● Use student reading log ● Use Cloze exercises ● Write summaries ● Encourage students to write headlines ● Write character diaries ● Have students present information with illustrations, comic strips, or other visual representations 	<p>Helping ELL students adjust to the classroom</p> <ul style="list-style-type: none"> ● State/display language, content and metacognitive objectives ● List instructions / process steps and review orally ● Present information in varied ways (oral, written demonstrations, with tangible objects) ● Frequently summarize key points ● Repeat and paraphrase important terms ● Have students maintain notebooks ● Allow students to provide answers and explain processes instead of you telling them logs for metacognitive strategies
<p>Adjusting teaching style:</p> <ul style="list-style-type: none"> ● Develop a student centered approach ● Increase the percentage of inferential and higher order thinking questions ● Provide correction for language errors by modeling, not overt correction ● Incorporate peer tutoring ● Use the Writing Process ● Use questionnaires / interviews 	<p>Motivating students and providing background knowledge:</p> <ul style="list-style-type: none"> ● Use Semantic Webbing and graphic organizers ● Use Anticipation Reaction Guides ● Have students brainstorm, then record responses on chalkboard before starting lessons ● Use maps, photos, and manipulatives ● Do activities where students can interact and move around ● Do demonstrations ● Provide students with outlines of lessons and questions that will be asked beforehand, so they have an opportunity to process information and participate more readily

In its comprehensive nature, education that is based on the Core Principles of Public Waldorf Education is an example of a program that asks teachers to use the methods described in this section for all students and so the classroom environment is conducive to ELD for ELs equally. Research has indicated that before age thirteen exposure to more than one language should be recognized as learning more than one first language and not in degrees of first, second, third languages. All students, including ELs will also benefit from class time devoted to instruction in at least one other world language, Spanish.

Developing student competencies are challenged by tasks that engage them with real issues and students are expected to challenge their own and others' thinking in discussions, presentations, and debates. Projects that serve communities both locally and globally will be a cornerstone of our

program at Sun Mountain Community School and promote student responsibility for improving the world they inhabit.

In addition to the major program design features at Sun Mountain Community School that support students who are English learners, teachers at Sun Mountain Community School will employ the following specific strategies in their classrooms:

1) Vocabulary and Language Development

- Teachers introduce new concepts by discussing vocabulary words key to that concept.
- Teachers build on student's background knowledge and cultural background.
- Classrooms reflect a language rich environment (i.e., language charts, shared reading and writing experiences, other writing displayed throughout the room and used daily by students).

2) Guided Interaction (collaborative learning)

- Teachers structure lessons so students work together to understand what they read— by listening, speaking, reading, and writing collaboratively about the academic concepts in the text.
- Teachers provide students with opportunities to negotiate meaning from language and text and to work in cooperative pairs or groups to develop problem-solving and social skills.
- Teachers group students flexibly, at times working in heterogeneous groups and at times not.

3) Metacognition and Authentic Assessment

- Rather than having students simply memorize information, teachers' models and explicitly teach thinking skills (metacognition) crucial to learning new concepts.
- Teachers use a variety of activities to check for student understanding, acknowledging that students learning a second language need a variety of ways to demonstrate their understanding of concepts that are not wholly reliant on advanced language skills.
- Teachers "make thinking public," the metacognitive aspect of teachers and students modeling how an answer was arrived at, not merely what the correct answer was.

4) Explicit Instruction

- Teachers utilize direct teaching methods to teach concepts, academic language, reading comprehension strategies, text patterns, vocabulary, writing patterns, and decoding skills needed to complete classroom tasks.

5) Meaning-Based Context and Universal Themes

- Teachers incorporate meaningful references from the students' everyday lives and use them as springboards to interest them in academic concepts.
- Teachers create classroom environments that provide authentic opportunities for use of academic language.
- Teachers provide students with opportunities to activate and focus prior knowledge via inquiry charts, brainstorming, and clustering.

6) Modeling, Graphic Organizers, and Visuals

- Teachers regularly utilize a variety of visual aids, graphic organizers (such as Thinking Maps), pictures, diagrams, summaries, and charts to help English learners easily recognize essential information and its relationship to supporting ideas.

Specific Trainings

Integrated and Designated ELD Instruction

Because the Waldorf pedagogical approach is already saturated with SIOP methodologies, and because children generally learn best with their peers, we expect that most EL learners will engage in Integrated ELD instruction at Sun Mountain Community School.

Integrated ED Instruction: Additional ELD instruction will occur in the general classroom environment throughout the school day. Integrated ELD instruction will occur in every subject area by every Sun Mountain Community School teacher who has an ELL student in the classroom. The WIDA ELD Standards framework, used by the state of NM for curriculum, instruction and assessment of multilingual learners, will be used in tandem with the NM Common Core State Standards (CCSS) for ELA/Literacy and other content standards to ensure students strengthen their abilities to use academic English as they learn content through English.

Specific Training

The Supporting Foundation will support specific training mentioned above in the narrative. These include SIOP training and TESOL training. SIOP training will be targeted most directly to specialty subject teachers.

SCHOOL COMPLIANCE

Is the school protecting the rights of English Learner students?

(PEC-Charter-Performance-Review-and-Accountability-System-2019, PDF (webnew.ped.state.nm.us))

- The school has no complaints that have been evaluated and found to be valid complaints that indicate an EL student's or families' rights have been violated. (NMSA 22-8B-4 (A))
- The school does not have a major discrepancy (>5%) between ELs identified and assessed as monitored by the Language and Culture Bureau, or is able to provide appropriate documentation and explanation for such a discrepancy.
- All EL students must be provided services as evidenced by STARS data reporting for services coded as 1062 (ESL) or 1063 (ELA/ELD), or must be coded as a parent refusal and have documentation to support the refusal as monitored by the Language and Culture Bureau.
- The school has received no OCR complaints determined to be valid that demonstrate a students' rights were violated. (NMSA 22-8B-4)
- Review of student cumulative files during site visits to insure compliance with state and federal law regarding servicing English Language Learners.

References for this section:

Echevarria et al. (2012). Making content comprehensible for English language learners: The SIOP model (4th ed.). Boston, MA: Allyn & Bacon.

Friedlaender, D., Beckham, K., Zheng, X., & Darling-Hammond, L. (2015). Growing a Waldorf-Inspired Approach in a Public School District. Stanford, CA: Stanford Center for Opportunity Policy in Education.

Vogt, M., Echevarria, J. J., & Short, D. J. (2016). *Making content comprehensible for English learners* (5th ed.). Pearson.

G. (2b) ELL Evaluation and Monitoring

Provide a **clear, comprehensive, and cohesive plan** to regularly evaluate and monitor the progress of English learners.

MONITORING PROGRESS

Sun Mountain Community School is committed to monitoring the implementation of state statute ELL policies, programs, and services, and to evaluating their implementation as well as their effectiveness in order to continuously improve them and hold itself accountable for outcomes.

All parents of students entering the public school system for the first time must complete a Language Usage Survey (LUS). Each student should have only one LUS completed during his or her public education career in the United States. The LUS is kept in the student's cumulative file and transfers as part of the student record to the schools that the student attends.

WIDA Testing

All students who indicate that their home language is other than English will be administered the English Language Proficiency Assessment - WIDA Screener tested within thirty days or 60 days before the start of the school year of initial enrollment²⁹ and at least annually thereafter between July 1 and October 31 until re-designated as fluent English proficient.

Parent Notification

Sun Mountain Community School will notify all parents of its responsibility for state-mandated WIDA testing and of WIDA results within thirty days of receiving results from the publisher. The WIDA shall be used to fulfill the requirements under the Elementary and Secondary Education Act for annual English proficiency testing.

Instruction

SMCS is committed to hiring an instructional staff that can meet the needs of all students, including English Learners. A future to-be-formed Supporting Foundation will support specific training mentioned above in the narrative. These include SIOP training and TESOL training. SIOP training will be targeted most directly to specialty subject teachers.

Reclassification

We intend to reclassify as soon as possible. The SCOPE study determined that Waldorf methods, was the reason there were so few designated English Learners above fourth grade, was because of the high redesignation rate (SCOPE 2015, pg 33.). We believe that with our comprehensive support framework described below in our section on Strategies for English Learner Instruction and Intervention, as well as other special attention to parental partnerships, and special attention to high attendance rates, SMCS will be successful in its ability to aid EL students so that they may be reclassified as early as possible.

Reclassification Procedures: Reclassification procedures utilize multiple criteria in determining whether to classify a pupil as proficient in English including, but not limited to, all of the following:

- Assessment of language proficiency using an objective assessment instrument including, but not limited to, the WIDA.
- Participation of the pupil's classroom teachers and any other certificated staff with direct responsibility for teaching or placement decisions of the pupil to evaluate the pupil's curriculum mastery.
- Parental opinion and consultation, achieved through notice to parents or guardians of the language reclassification and placement including a description of the reclassification process and the parents' opportunity to participate, and encouragement of the participation of parents or guardians in the reclassification procedure including seeking their opinion and consultation during the reclassification process.
- Comparison of the pupil's performance in basic skills against an empirically established range of performance in basic skills based upon the performance of English proficient pupils of the same age that demonstrate to others that the pupil is sufficiently proficient in English to participate effectively in a curriculum designed for pupils of the same age whose native language is English.

At the beginning of each school year, teachers will evaluate student progress along the ELD Proficiency Level Continuum for each of their English Learners by looking at the WIDA scores, end of year assessments, beginning of year assessments to see level appropriateness. Teachers will use this information to continuously monitor each English Learner's ability to achieve growth and progress through their proficiency level on the grade-level standards. Every evaluation period, teachers evaluate the recorded evidence from the ELD Monitoring Tracker and evaluate student's progress with respect to their Proficiency Level Descriptors for the WIDA ELD Standards. The progress of English Learners moving to the next level throughout the school year will be used to evaluate the EL program. Additionally, the school will look at the number of English Learners meeting the criteria to be reclassified as fluent English proficient (RFEP).

The results of this evaluation will be used to improve the EL program each year. Any grade-level standards or coursework that were particularly difficult for English Learners to master will be identified. The instructional and assessment methodologies for these standards will be addressed to improve the likelihood of English Learners achieving these standards the following year. In addition, any of the individual criteria for reclassification that is a barrier to reclassifying English Learners as fluent English proficient will be identified and addressed. Achievement gaps in ELA and Math will be regularly analyzed and strategies for student support will be designed and implemented within strategic lessons. Regular reports to our School Board on comparative EL group progress will guide next steps and support budgetary allocations as needed.

Meeting State ELD Standards & Use of the Results of the WIDA

Our programs to support English Learners are based on the 2012 revised ELD Standards. EL instruction will be grounded in the best available research on supporting ELs and guided by the WIDA ELD Standards. Students will be expected to advance at least 1 ELD level annually as measured by the ELPAC. Our Testing Coordinator and Lead Teacher will partner with the student's teacher to include ELD goals on students' Individualized Learning Plans. Additionally, our Lead Teacher will assess student progress towards attainment of the standards using a standards-based guide, for example, EL portfolios.

Serving Students Performing at Different ELD Levels

Students who score WIDA scores of 1 and 2 may be candidates for designated ELD support. In these groups, teachers will provide specific instruction of skills that will allow the student access to the grade-level ELA standards. Targeted instruction supports the growth of our EL students in structuring

cohesive texts, effectively using linguistic structures to expand and enrich ideas, as well as strategically connecting and condensing ideas across curricular areas.

For students with less than reasonable fluency who are at ELD Levels 1-3, Sun Mountain Community School will offer a Structured English Immersion Program with either a contracted ELL specialist instructor or in class with a TESOL trained teacher, consisting of the following supports:

- Standards-based instruction in all curricular areas.
- Differentiated instruction in reading, writing, math, science and social science, delivered through Sheltered Instruction Observation Protocol (hereafter referred to as SIOP) 8 step methodology, utilizing the curricular materials described in this petition.
 - lesson preparation,
 - building background,
 - comprehensible input,
 - strategies,
 - interaction,
 - practice and application,
 - lesson delivery, and
 - review and assessment.
- Primary language support to motivate, clarify, direct, and explain, is provided according to student need.

For students who are reasonably fluent in English in ELD levels 4-5 (or for students whose parents who have waived a Structured English Immersion Program for their children and requests a Mainstream English Program) the supports described above will be offered but with more strategies targeting the Bridging development level.

Monitoring and Evaluation of Program Effectiveness

SMCS will evaluate the effectiveness of its education program for ELLs by:

- Adhering to SMCS-adopted academic benchmarks by language proficiency level and years in program to determine annual progress.
- Monitoring teacher qualifications and the use of appropriate instructional strategies based on program design.
- Monitoring student identification and placement.
- Monitoring parental program choice options.
- Monitoring availability of adequate resources.

References for this section:

Friedlaender, D., Beckham, K., Zheng, X., & Darling-Hammond, L. (2015). Growing a Waldorf-Inspired Approach in a Public School District. Stanford, CA: Stanford Center for Opportunity Policy in Education.

G. (3) ESSA

Provide a **clear, comprehensive, and cohesive plan** to ensure adherence to ESSA and State statutes in addressing the needs of Native American Students, Hispanic Students, Black Students and Bilingual and Multicultural educational plan to improve educational outcomes. The narrative should include an

explanation of the supplemental program or services offered to ensure implementation and ensure policies will be culturally and linguistically responsive.

Sun Mountain Community School is committed to providing a program that adheres to the objectives of New Mexico Rising, the state's plan for implementing the Every Student Succeeds Act of 2015. The needs of our Hispanic and Native American Students will be met in a way that is culturally and linguistically informed. SMCS Bilingual and Multicultural educational plan, outlined in Section I.D.: Bilingual Multicultural Education, Indian Education and Hispanic Education, details our responsibilities under the Bilingual Multicultural Education Act, the Indian Education Act, and the Hispanic Education Act. SMCS is committed to improving outcomes for Native American Students, Hispanic Students, and other student groups highlighted in the New Mexico Rising and the Yazzie and Martinez Consolidated Lawsuits. SCCS's plan, which aims to be as thorough as possible, is described in the sections below.

DEVELOPMENT OF THE CULTURALLY AND LINGUISTICALLY RESPONSIVE SCHOOLING BY DESIGN (CLR) PLAN

Overview

Sun Mountain Community School is committed to culturally and linguistically affirming practices that give students a deeper sense of belonging in the community and support higher levels of academic achievement. An important task during the implementation year will be the collaborative efforts of our founders, Equity Council, and the leadership council, in creating a plan for the successful implementation of Culturally and Linguistically Responsive Practices throughout all areas of the school. These practices will directly follow the recommendations from the CLR Guidance Handbook, and will inform the formal CLR Action Plan that will be implemented at the school. In preparation for the creation of the CLR Action Plan, the Equity Council will work collaboratively with families, educators, and community members to gain valuable feedback on how SMCS can most effectively support our students in a way that is equitable and focused on the specific needs of Native American students, Hispanic students, English Learners, socioeconomically disadvantaged students, and students with disabilities.

Our plan is detailed as follows:

1. Implement open lines of communication between SMCS and our community, using a combination of surveys, focus groups, parent evenings, and community forums to gain a deeper understanding of the barriers our underserved students face.
2. Intervention strategies will be chosen based upon supporting evidence and alignment with our developmental model.
3. All assessments will be provided in other languages.
4. ELL resources will be available to support families and shorten the time it takes ELLs to fully integrate into English instruction.
5. The academic program is designed to fully engage students while giving room for flexibility to implement necessary adaptations to meet special education learners and gifted students.
6. SMCS plans for transparent school accountability
7. SMCS is committed to the training and evaluation of CLR teachers.

The development of SMCS's CLR Action Plan will be carried out by SMCS's Governing Board in collaboration with SMCS's Head of School. This group will comply with the recommendations from the CLR Schooling by Design tool. In the following years, implementation and oversight of the CLR Action

Plan will be the responsibility of SMCS's Equity Council. Members of the Council will be appointed by the Head of School, and will be established during the first quarter of operation (November, 2025). For a detailed overview of the role and responsibilities of the Equity Council, see Section I. D.

Responsibilities and Professional Development

An official recommendation for SMCS' Culturally and Linguistically Responsive Plan from SMCS's Equity Council will be presented to the SMCS's School Board and Head of School. Related professional development topics will be brought into Friday professional development days and in-service training.

SCHOOL-BASED ROLE DESCRIPTION OF RESPONSIBILITIES

Head of School

SMCS' Head of School is responsible for putting all Governing Board adopted recommendations from the Equity Council into practice. Other responsibilities include strategic planning and coaching other school-based leaders, and the professional development of Elementary School Teachers related to CLR/SbD instructional practices. The HOS will work with the Leadership Team to oversee the equity audit process.

Operations Director

SMCS' Operations Director is expected to implement all practices adopted by the Governing Board that relate to operations. Examples of such practices include: family and community relations, professional communication, and work with contracted service providers.

Instructional Leadership Staff

SMCS' Head of School, Pedagogical Director, School Social Worker, and Special Education Director are expected to collaborate to make sure that CLR/SbD professional development opportunities are provided in continuity with recommendations from the Equity Council and Governing Board. These staff members are also responsible for delivering professional development that supports CLR/SbD teaching, as well as providing teachers with feedback and coaching on the effectiveness of their CLR/SbD teaching practices.

Instructional Staff

SMCS's Instructional staff members, including lead teachers, specialty subject teachers, assistant teachers, and educational assistance, are expected to have a deep familiarization with the principles of CLR/SbD instruction and pedagogy. Supported by professional development provided by the Instructional Leadership Staff, the CLR/SbD Plan will be present in instruction by utilization of culturally responsive teaching practices. Once relevant student data has been collected from teachers and processed by the pedagogical director and the Head of School, instructional staff will be responsible to access student data that is connected to goals related to supporting the needs of Native American students, Hispanic Students, English Learners, economically disadvantaged students, and students with disabilities.

Sun Mountain Community School's professional development will be created and delivered by our Instructional Leadership Staff. When and if an external expert is brought in to provide professional development to school-based staff members, it is the responsibility of SMCS's Head of School to oversee their work and ensure that it aligns with the specific needs outlined in the CLR/SbD Plan. A list

of helpful training that would develop linguistic and cultural competency can be found in Section II.F.(1) Professional Development.

PROFESSIONAL DEVELOPMENT STRAND DESCRIPTION

Anti-Bias, Anti-Racist Education

SMCS gives staff the opportunity to develop based on our commitment to being an anti-racist and anti-bias community. These sessions are designed to acquire knowledge, build empathy, and explore identity, as well as different viewpoints and ways of being. Development in this strand supports the personal and professional development of staff members, and fosters community health and inclusivity from the inside out. Sessions in this strand are facilitated by experts and include follow-up sessions led by SMCS's Leadership Team.

Identification of and Support for English Learner at SMCS

The process for identifying English Learners and the role instruction staff play in the process is a topic of key importance in the professional development that occurs in the summer. Training in this area also includes effective instructional methods for English Language Development and an overview of the instruction and consultative services provided by an ELL contracted specialist. These sessions are created by SMCS's Leadership Team in collaboration with our Bilingual Teacher/Coordinator.

CLR/SbD Practices within MLSS

Development for staff will also include an overview of the way in which English Learners are supported through Multi-Layered Systems of Support (MLSS). Topics include training in EL specific supports across all three layers of support, goals for ELs, data collection methods, and an understanding of the information that is considered when an English Learner is referred to the Student Assistance Team (SAT).

Case Studies and Book Clubs

Once a quarter, staff will engage with a case study, book, or article that deals with themes related to race, identity, language, and/or culture. A comprehensive list of materials will be created by SMCS's Leadership Team, and teachers may choose whatever material best meets the needs of their classroom and/or professional development. Groups will then meet to discuss their chosen materials, with the explicit goal of leaving the sessions with expanded knowledge and applications for the classroom or work with families.

CLR/SbD Family Communication and Engagement

SMCS will devote time to training all staff in communication best practices, particularly the role that school-based staff play in communication with our families. Systems of communication will be designed to maximize clarity and understanding across families from diverse backgrounds. In an effort to work collaboratively with the families of ELL students and students with special needs, teachers are given tools to cultivate open lines of communication and at-home engagement with learning. Additionally, there will be specific training related to EL programming services progress monitoring and MLSS targeted and intensive intervention progress monitoring. This strand of Professional Development will be led by Leadership Team Members, SMCS's Bilingual Teacher/Coordinator, and SMCS's School Counselor.

SEL and CLR/SbD

As a community that places great value on the social and emotional wellbeing of our students, SMCS will provide professional development to ensure that our SEL program aligns with cultural and linguistic responsiveness. We will use the Caring School Community Curriculum (CASEL SElect) program to support SEL in the classroom. Professional development in this stream emphasizes giving teachers the tools to support students in the five core areas as put forth by CASEL (Collaborative for Academic, Social, and Emotional Learning):

- self-awareness,
- self-management,
- social awareness,
- relationship skills,
- responsible decision making.

Additionally, development will focus on classroom-applicable strategies that align with our CLR/SbD Plan, including self awareness and identifying personal, cultural, and linguistic assets, and how teachers can refine their own cultural competence to promote their students' understanding and appreciation of other cultures and identities.

BEST PRACTICE IDENTIFICATION AND APPLICATION

SMCS is built on a foundation of evidence-based practices that align with cultural and linguistic responsibility. In the founding of SMCS, the School Board will work collaboratively with the Equity Council to review all demographic information collected from the community. These findings will inform SMCS with a deeper understanding of the community landscape, especially the underserved populations we anticipate serving at SMCS. Based on these findings, SMCS leaders will adapt on-going professional development for school-based staff with the desired goal of identifying best practices that teachers can utilize in the classroom to support desired results for students who have historically been underserved.

We will join other community schools in a monthly meeting to discuss the topics of the book with community colleagues (*Cultures of Thinking in Action*). This will be required reading for all instructional staff members at SMCS, so that there can be common understandings and agreements around the language, processes, and suggested approaches laid forth in the group study. Through this collective knowledge, we are giving our teachers the capacity to be culturally and linguistically responsive in the classroom.

The defining of best practices in CLR/SbD Teaching is based on finding a connection between research supported approaches, strategies, and techniques, and the ever evolving needs of our students. When best practices have been decided upon, professional development for all instructional staff will be implemented. Sessions in this stream will include both knowledge acquisition and practical application of concepts. Following professional development, teachers will receive feedback and support through classroom observation by Instructional Leadership Staff and follow-up meetings.

Culturally and Linguistically Responsive Policies

Sun Mountain Community School's administrators will work collaboratively with the Equity Council and the Governing Board to ensure that policies are developed with an equity lens that prioritizes

Cultural and Linguistic Responsiveness. SMCS focuses on improvement by incorporating recommendations from our Equity Council to update policies that are affirming and relevant. Policy evaluations will occur on a semester basis to allow for continuous improvement in this policy area. Feedback from stakeholders (including families, students, teachers, and community partners/providers) will be an important aspect of the evaluation process.

At the end of each semester, all stakeholders will complete a survey in which summary information will be collected about satisfaction and general feedback, specifically focused on systems, programming, and policies. The data will be anonymous and disaggregated for privacy and accuracy in understanding the experiences of different identity groups in the school. These identity groups include Native American, Hispanic, and Bilingual students, families, teachers, and community providers at SMCS. During our implementation year this survey will be developed internally or adopted from existing survey options.

SMCS will regularly conduct Equity Audits to help identify weaknesses in our cultural programming and policies. As defined by the Intercultural Developmental Research Association (IDRA), Equity Audits are needed to check potential discriminatory trends in student performance or outcome data by identifying potentially harmful practices and policies. Expanding further on this IDRA Equity Audit, SMCS will focus on three specific areas in the spring semester of each school year, with summary data available by May 1st. These specific areas for Equity Audits are: programmatic equity, quality of teaching, and achievement gaps. Data from the Equity Audits will help create insights for improved revisions to SMCS school policies.

Sun Mountain Community School will develop Rigorous and Relevant Curricula and Instructional Materials that the school will follow with timelines and processes. The process for adopting new curricula begins March 1st of every school year, with final materials complete and delivered by July 1st. This process follows specific NMPED Instructional Materials Bureau recommendations (if available) and applies to all core content areas. Alternatively, SMCS may utilize the High Quality Instructional Materials (HQIM) resource provided by the Instructional Materials Bureau. These HQIM resources include considerations for Culturally and Linguistically Relevant materials. The instructional leadership team is undergoing curricular training so that our social studies curriculum aligns with best practices for bringing under-told stories to the teaching of NM history and heritage.

Sun Mountain Community School will meet the needs of culturally and linguistically diverse students by offering supplemental programming, scheduling, and services. The block scheduling of courses allows for a wide variety of literacy programming in all grades to reach each student and their needs.

Specific to English language learners, SMCS will encourage SIOP and TESOL training in addition to the contracted hire of an ELL specialist. The structure of our curriculum will also naturally offer support for ELL students (as fully described in Section II.G.(2a). The emphasis is on oral expressions, basic skills, and concepts that support school success. The focus for both programs is on small group or individual lessons. These SEL focuses will help create relationships and skills between students by having them share information and stories that positively highlights elements of culture and identity.

Reporting for Students and Families: Communication and Engagement

Consistent and open communication with our families about student progress is a key component of SMCS. Collaboration with families is necessary and essential to cultivate a deeper understanding of the cultural and linguistic identities and needs of our students. School staff will also work with families to implement best practices that support students across home, school, and community settings.

Communication between teachers and families will be clear and consistent, especially for families of historically underserved students. Beyond adherence to all procedural communication responsibilities identified in state and federal laws, SMCS will focus communication on reporting and acknowledging progress toward collaboratively developed goals. SMCS is committed to communicating in each family's preferred language, and will use various methods of communication to promote engagement and reduce barriers to access.

Examples include weekly updates, twice a year parent-teacher conferences, or family visits to the student's learning environment. SCCS will also invest in engaging our parents and families through specific family programming events, allowing families to share aspects of familial and cultural practices with other SCCS families. All information shared with parents/guardians is also shared with students using age/developmentally appropriate methods. In sharing progress data, the primary goal is to create many opportunities to celebrate success with students through clear goals that are ambitious but attainable, regular check-ins, and frequent opportunities to celebrate success.

Evaluating Program Effectiveness

Evaluation of the quality and effectiveness of programming and support for Native American students and Hispanics Students as well as a review of the effectiveness of our Bilingual and Multicultural education programming will be conducted on an annual basis, with progress reflections completed at the end of each semester. Based upon guidance from state and federal agencies, SMCS will make sure that evaluations are focused on policies, programs, procedures, practices, resources, staffing, and student outcomes. SMCS's program evaluation will align with requirements for program evaluation and reporting laid out by the Office of Civil Rights. Evaluation of this program will be held by the Head of School in Year 1 and then in following years will be held by the Bilingual Teacher/Coordinator. This evaluation will report the following information for Native American students, Hispanic students, and English Learners:

- Scores on state and local assessments
- Scores on annual English language proficiency
- Grades in content area courses
- Retention rates
- Reclassification/exiting rates
- Participation rates in special education services and eligibility categories
- Mobility and attendance rates
- Participation in extracurriculars
- Social, emotional, and behavior trends across subgroups, including suspension rates
- Representation across layers 1-3 in Multi-Layered Systems of Support
- Percent of students qualifying for and participating in EL programs and services
- ACCESS for ELLS 2.0 performance trends (within and across years)

Performance will be evaluated based on the areas listed above, and will add or modify categories if needed based on guidance from the Public Education Department, the United States Department of Education, the United States Office of Civil Rights, and recommendations of SMCS's Equity Council that are adopted by SCCS's Governing Board. This approach is subject to change from year to year, based on performance comparisons to students in schools in our proposed community and city and state averages.

H. Assessment and Accountability

A charter school application should include a clear plan for evaluating student performance across the curriculum. (NMSA 22-8B-8(E)). This plan should align with state performance standards, as well as with the proposed school's student performance goals, and should be presented, along with a clear timeline for achieving these standards/indicators/goals. A clear explanation of the types of assessments and frequency of administration should be included, reflecting thoughtfulness given to tracking student progress. A plan for the use and dissemination of data gathered through assessments should include procedures for how the School Board will initiate corrective action (both individually and collectively) if pupil performance falls below expected standards.

When developing the assessment plan, consider the following: 1) the appropriateness of assessments to the curriculum; 2) what will serve as baseline for student progress comparisons; 3) the inclusion of school, state, and other assessments to demonstrate appropriate student growth; 4) the ability of the assessment plan to provide for the early detection of students struggling with curriculum content; and 5) the ability of assessments to reflect the use of basic skills at grade-appropriate levels (e.g., reading, writing, problem-solving). Finally, all New Mexico public schools, including charter schools, are subject to a variety of testing requirements, which are aligned with state and federal content standards.

For more information on NM assessment requirements, please see:

<https://webnew.ped.state.nm.us/bureaus/assessment/>

H. Assessment and Accountability

H. (1) Assessment Plan

Provide a **clear, comprehensive, and cohesive assessment plan.**

The Sun Mountain Community School (SMCS) is a community of families and educators dedicated to cultivating the intellectual, social, emotional, physical and consciousness capacities of the developing human being. Our mission is to educate the whole child, using an age-appropriate approach to content and skills based on principles of Waldorf Education and the work of Rudolf Steiner. Our students engage in rigorous academics, develop connections to the natural world and moral discernment, and achieve an appreciation of themselves and others.

ASSESSMENT PHILOSOPHY

Assessment will be ongoing at SMCS, and methods, while recognizing areas of improvement, will build upon students' strengths and skills as teachers strive to help students develop their multiple intelligences. Because assessment of student performance is one of the most powerful tools a classroom teacher and school can use to enhance student achievement and school-wide performance, assessment will be integral as a part of daily instruction. We believe our system of assessment will be effective because the goal is clear, formative assessments and feedback are frequent and ongoing, reflective and reciprocal between educators, students and parents. Educators will provide descriptive feedback to students and families during parent conferences, where the student work will be reviewed. SMCS will also provide semester report cards that address each

content area within the curriculum for grades 6-8. Teachers of students k-5 will receive written narrative assessments and rubrics at the end of each semester.

Beginning with the Goal

SMCS has ultimate responsibility for ensuring that the school is fulfilling the expectations and obligations under the Charter Schools Act, the SMCS charter, and SMCS school policies. The Head of School will be responsible for legal and organizational adherence to assessment policy and procedures. SMCS will approach standardized tests from a goal-first approach. This means administration and faculty will start with a very clear idea of the information and the tools of learning that the school wants the students to acquire at each grade. This requires great familiarity with Common Core standards and the Waldorf approach. Teachers will work with the Pedagogical Director and participate in the teacher-to-teacher mentorship program, to understand and use the scope and sequence of their grade, and to deliver this goal curriculum in an integrated and holistic way throughout the year. Assessment results will be analyzed by the Head of School and the School Board to reflect back on how well the clear goal was met or not.

Formative Assessments

The Waldorf approach has a long tradition and historical strength of formative assessments. For example, “mental math” is played every morning. Old and new skills are presented as questions to students to complete in their heads and answer when called upon. This is done with spelling words as well. A review of the previous day's material is part of every main lesson. After the teacher presents to the whole group, students commonly are broken up into partners or small groups (sometimes of equal capacities and sometimes with planned varying capacities) to explore assignments with peers. Beginning in 5th grade and becoming more and more common as the years advance, quizzes and end of block tests are given. Some of these are graded and some are not. Games and group projects are also used that require content knowledge without resulting in grading. Recitation of verses, math facts, spelling words, and prose are done together, using the group to aid in the gathering of knowledge. These formative testing strategies will support the summative assessment of CCS. The incorporated practice of review in the main lesson allows older students to ask questions and begin developing the muscle of critical thought.

Feedback

In this daily use of formative assessments, teachers are able to evaluate how well students are moving through learning goals and adapt their teaching to the whole group, targeted instruction groups, or an individual. Feedback occurs in many different relationships included below. (See how Uniqueness #6 Looping particularly enhances feedback across these different relationships.)

- Teacher to student
- Student to teacher
- Student to student
- Teacher to/from specialty teacher
- Teacher to/from parent

Summative Assessments

SMCS's summative assessment methods will evaluate all realms of the child's development, including their intellectual, physical, social-emotional capacities which is guided by the principle of “hands, head, heart”, a core principle of public Waldorf education. Within this collaborative context, the Head of School will manage the assessment program by analyzing qualitative and quantitative achievement data and then regularly making recommendations to the faculty and School Board.

SMCS will use iMSSA from 3rd-8th grade, three times a year as our interim testing. This will allow the School Board to assess a child's progress all the way through the grades. We will conduct NMSSA tests each spring for 3rd-8th graders, and the ASR in the 5th and the 8th grade. WIDA ACCESS testing will be given as part of our ELL and special education programs.

Testing in the first month of the school year will allow teachers to pinpoint each student's current level of performance as well as a baseline to allow for academic growth measurement in reading and math year by year. Using this assessment approach, SMCS will be able to generate a Student Profile Report to allow teachers to pinpoint areas of strengths and weaknesses so that they may customize instruction in order to maximize instructional benefits throughout the year. The mid-winter assessment will provide a report of areas of growth and/or areas that need further strengthening. Spring assessments will allow teachers to look back on the students' success and pitfalls of the entire year. The Head of School and the School Board will make sure that the results of these tests are easily accessible so that teachers have the data at their fingertips in order to make lesson planning or MLSS decisions.

On a yearly basis, administration and teachers will work together to comprehensively and thoroughly understand where students are as a whole as well as on an individual level. Once data has been collected, reported, and analyzed, teachers and administrators will work together to make school-wide adjustments (if necessary), individual and/or classroom changes in teaching methods in order to improve. In following the principles that guide public Waldorf Education, SMCS teachers and administrators will consistently strive alongside the students to become more proficient at what they do and will actively resist any tendency to become complacent in their desire to meet the students where they are developmentally.

CORE ASSESSMENT METHODS

Responsible Parties

In the first year of the school, assessments will be conducted and reported by the Head of School. As the enrollment and administration grows, the Head of School may assign the Special Education Director or the Operational Manager to help conduct and report data from these tests. As a part of the responsibilities of conducting tests, the HOS will prepare teachers during a Friday professional development day on how to prepare and present the tests to their students. Practice test may be used as a teacher's aid, allowing her to go through the test with her students looking for unfamiliar vocabulary and question structure. The HOS will also, ultimately, keep track that all students have taken all required tests.

Once tests have been completed, the HOS is responsible to report the results of all tests to the School Board.

Using Multiple Measures

Employing many different methods to assess students is integral if we are to successfully measure the depth and breadth of what students are learning. Multiple measures provide a more complete and accurate representation of student achievement over time than is possible with a single measurement of assessment. The use of multiple measures also serves to ensure that instruction does not focus on a single test or a narrow set of learning styles. SMCS will base performance assessments on the Waldorf/Common Core State Standards developed by the Alliance for Public Waldorf Education. These standards, provided in the Supplementary Binder, were designed to align Waldorf methods curricula with Common Core Standards over the nine year period of kindergarten through eighth

grade. SMCS chose these standards based on their clear, grade-by-grade correlation of Waldorf methodology with the Common Core State Standards.

Figure 36 - Grade specific assessment chart timeline

Grade	Administration Timeline	Assessment	Purpose
K-8th- dependent on parent responses on the Language Usage Survey.	Within 30 days of the beginning of school or 2 weeks from enrollment	The Kindergarten WIDA-ACCESS Placement Test (W-APT) and WIDA Screener (for Grades 1-12)	The WIDA-ACCESS is used to identify students as either an English Learner, or as fluent in English.
K-8th Every year until RFEP	Once per year, mid. Jan. - Early March	ACCESS	The ACCESS is to measure how well ELs are progressing with English development in academic English.
K-8 Every year for qualifying students	Once per year, mid. Jan. - Early March	Alternate ACCESS	Administered to ELs with the most significant cognitive disabilities when the student's IEP indicated this being an appropriate assignment
K-2nd grade	Three times a year	Istation	A performance of testing and date in reading and math throughout a student's enrollment at SMCS.
3rd-8th	November 15, 2023	Dynamic Learning Maps First Contact Survey	LEA's are required to complete all First Contact Survey
3rd-8th	March 11 -May 10, 2024	Dynamic Learning Maps (DLM)	Designed exclusively for students with the <i>most significant cognitive disabilities</i> who have been identified as an "Alternate Assessment" participant in the IEP.
3rd-8th grade	Once per year, in the spring	Measures of Student Success & Achievement (MSSA)*	Assessment in math, English language arts, and Spanish language arts; aligned to the NMCCS and CC Español Standards for SLA. Measures a student's grade level proficiency and progress toward college and/or career readiness.
4th and 8th grade in targeted, pre-identified schools	February	National Assessment of Educational Progress (NAEP)	An assessment of what America's students know and can do in various subject areas.
5th, and 8th	Once per year during Spring	Assessment of Science Readiness (ASR)	Assessing science proficiency aligned to the New Mexico STEM Ready! Science Standards.
Beginning of 1st and the end of 2nd	By the 40th day of school and within two weeks of initial NM enrollment	Dyslexia Screening	The screeners flag possible characteristics of dyslexia, but do not diagnose students with dyslexia.
3rd-8th grade	Nov 15 - Dec 15, and again in the spring (exact dates TBD).	Student Wellbeing & Competency Survey (formerly called the Youth Forward Survey Administration)	<i>Required</i> for all students in grades 3-8. Please see the Panorama for New Mexico information sheet.
K-3 ELA, SLA K-2 Math	Twice a year: Dec 1st. - Jan 31st April 1st - May 31st	Istation Indicators of Student Progress Math, SLA, ELA	ISIP is required statewide for Grades K-2 at BOY, MOY, and EOY. Early years reading is available for local use at Grade 3.

3rd grade	One time in the spring.	Gifted Screening.	Each LEA should establish procedures for this universal screening process.
K-2nd grade: in English and in Spanish, for ELs and BMEP programs	Twice a year: Winter and spring.	Indicators of Progress (ISIP) Mathematics	Measures and instructs students in the foundational skills known to be the most predictive of reading and mathematics success.
K-8th	By semester	Written Assessments and Rubrics (K-5) or Report Cards (6-12)	Assessment of learning, psycho/social, and motor skills in the early grades. Evaluation of course skill mastery in 6-12, using 1-4 in middle school and letter grades in HS.
1st-8th	At the end of thematic block study - approximately every 3-5 weeks	Main Lesson Block assessments based on Bloom's Taxonomy	Creative and formative assessment through Main Lesson Book work in core subjects.
K-8th	Once in September and once in April-May	Panorama Education's Social and Emotional Learning Student Survey	Will help teachers and administrators assess students' emotional happiness and developing will.
1st-8th	Based on individual student performance	Extra Lesson Assessment	To assess whether more activities need to be integrated into the classroom in order to help children maximize their ability to learn

As stated above, CCSS is co-aligned with SMCS's curriculum which is guided by the Core Principles of Public Waldorf education over their academic learning. We plan to use IStation or comparable assessments for placement and skill development needs, and report cards to measure academic, social, and motor skills. SMCS will also use student portfolios that include student work samples with a 4-point rubric. A score of 3 will demonstrate grade-level proficiency and achievement.

- The school ensures assessment accommodations are properly administered to all eligible students.
- The school complies with assessment training requirements: NMAC 6.10.7.8 and 9
- Has an identified District Test Coordinator (DTC) - DTC attends all required trainings, and
- DTC annually provides training for all district personnel involved in test administration, preparation, and security.
- The SMCS commits to protect the rights of students with special needs, (Note: These provisions include only students with disabilities.)
 - The school is in 100% compliance with the Special Education Bureau identified indicators. (34 CFR § 300.600 (a)(2) and Subsection F of 6.31.2.9 NMAC.)
 - The school has not been the subject of a due process hearing that resulted in a finding of noncompliance during the current school year.
 - The school has not been cited for noncompliance with applicable federal and state special education rules and regulations as the result of a state-level parental complaint during the current school year.
 - The school is in compliance with all terms of any corrective action plan that resulted from a state-level complaint.
 - The school has received no OCR complaints determined to be valid and demonstrate a students' rights were violated. (NMSA 22-8B-4)

- Review of IEP files during site visits to insure compliance with state and federal law regarding servicing students with special needs

Figure 37 - Description of academic framework indicators and measures
(PEC Charter Performance Review and Accountability System, Approved 5.10.19)

Indicator 1: Components from NM System of School Support and Accountability. The PEC considers charter school performance on each of the components of the NM System of School Support and Accountability.		
Measure	Description	Elem. Points
1.1 Math and Reading Proficiency 1.6 Growth of LowestPerforming Students (Q1) 25 15	Math and Reading Proficiency is the percentage of students who are proficient on state assessments in math and reading.	30
1.2 English Learner Progress Toward English Language Proficiency	English learner progress toward English language proficiency is measured by the WIDA ACCESS assessment given annually to students identified as English learners.	10
1.3 Science Proficiency	Science proficiency is the percentage of students who are proficient on state assessments in science.	5
1.4 Growth of HighestPerforming Students (Q4)	These growth measures are calculated separately for three student subgroups. The three student subgroups are the lowest-performing students (lowest 25%), the middle performing students (middle 50%) and the highest performing students (highest 25%).	5
1.5 Growth of Middle performing students (Q2/3)		10
1.6 Growth of LowestPerforming Students (Q1)		25

Extra Lesson Assessment

We will also use an Extra Lesson Assessment when necessary to learn whether students have sufficiently developed fine and gross motor skills, visual, tactile, auditory, speech, language, cognitive, social and emotional development so that they are primed to be successful learners. Extra Lesson was developed in the 1970's in England, by Audrey McAllen, who developed a first lesson of assessment techniques followed by a curriculum of movement, speech, painting and drawing exercises for children found to have learning barriers based on Rudolf Steiner’s lectures about the developing child. Now, the Association for a Healing Education (<https://www.healingeducation.org/>) has developed a comprehensive professional development program to aid schools and teachers toward the following mission:

“To serve the community of schools and educators who address the individual needs of children in Steiner schools and other environments. To support and further develop methods in Waldorf pedagogy, Extra Lesson and therapeutic education which are based on insights of Rudolf Steiner into the nature of human development in order to recognize and remediate hindrances which inhibit children from reaching their full potential.”

Because it has been shown that the listening, concentration, and understanding are associated with a well-developed sensory system, such as the vestibular system, and students will need to focus and sit quietly for extended periods of time in order to listen to vibrant oral presentations of histories, biographies, multicultural and international myths and then write and illustrate in their Main Lesson books, it is imperative that they are developmentally ready. During 2nd semester SMCS will use Extra Lesson Assessments when appropriate to assess students’ development of their motor-sensory faculties such as fine and gross motor skills, bodily coordination such as crossing the midline, proprioception (balance and spatial and temporal orientation), and rhythm to incorporate timing and

hearing. Using this mid-year assessment, teachers may choose to incorporate more physical-spatial exercises in order to help students further develop these capacities that support learning. Extra Lesson Assessments will be used in all grades when necessary to optimize the teacher's ability to bring further activities that enhance students' abilities to learn.

TEACHER'S ROLE

SMCS attaches great value to growing teachers' capacities as instructional leaders. Because teachers have continuous information about each student's current level of performance they will be empowered to design and administer daily classroom-based assessments. This will allow them to provide timely and specific instructional feedback to students, families, and service providers as well as adapt lessons, activities, and expectations appropriately. As assessment expert Richard Stiggins argues, classroom-based assessments are vital because teachers need continuous information about where each student is now in relation to key understandings so that they may adapt lessons, activities, and expectations (Stiggins, 1999). With this in mind, teachers will work to implement frequent formative assessments. Examples of quick phonics formative assessments used by Waldorf teachers:

- Four Corners: Students fold a piece of paper into four sections and label each section with a phonics sound. Students are given five minutes to come up with as many words as possible for each section.
 - Differentiation possibility: add suffixes
- Phonics Relay: Students are divided into teams and then form a single line. The first student will have a piece of paper, dry-erase board or chalkboard. The student is given a phonics skill. Then they write one word with that skill and run to the end of the line. Depending on the pattern, the students can run through multiple times.
- Tongue Twisters: Students write tongue twisters using their phonics skill of the week. Challenge them to read a partner's tongue twister until they can say it perfectly. Helps improve fluency.
- Behind You: A student stands with their back to the board. A word is written behind them that follows a phonics pattern. Students in the group will give clues so that the student can guess the word.
- Headaches: Students put an index card with an unknown word on their forehead. Partners give hints so that they can guess their word.
 - Differentiation possibility: One partner can have an affix and the other partner can have a phonics word.

Matching Desire and Effort with Achievement

A balanced approach to assessment is critical to making sense of a child's ability and aptitude for each individual subject. Using our growth mindset and desire to develop existential intelligence and "hardiness," SMCS will aim for students to recognize that there is a direct link between how hard they try and what they can achieve. SMCS, therefore, intends to inspire students through adequate preparation for assessments. They will be given practice tests not to complete, but to highlight and review all unfamiliar language or new types of questions, giving them confidence during the actual tests. By allowing time throughout the school day for recitation work, cooperative learning, and peer/cross-age interaction, SMCS's program will set students up for appropriate assessment achievement-level.

Parent-Teacher Conferences

Conferences for all students will take place twice a year. Parents, teachers, or students may request additional conferences. These conferences are essential in that they allow a complete picture of the child's performance to unfold. Conferences are especially effective as a result of SMCS's looping model, low teacher-student ratios, and warm community atmosphere.

Main Lesson Items

Main Lesson books, work samples, practice papers, written work and reports, artwork, etc. will be assessed. Teachers will use specific rubrics to ensure validity, reliability, and objectivity to evaluate Main Lesson items. Reports will be developed to establish clear assignment expectations and to provide meaningful feedback to students after each block. In the upper grades through High School, students will be made aware of rubric requirements and work toward mastery of each area specified by the teacher.

See Attachment 20 - Block Report Example

DEMONSTRATIONS OF UNDERSTANDING AND MASTERY

Demonstrations include oral recitations, presentations, reports, performances, or other demonstrations, which occur regularly beginning in first grade, by students individually as well as the class as a group.

Testing

All required tests, as indicated in the table herein, including but not limited to the assessments under the New Mexico's required assessments, the Measures of Student Success & Achievement (MSSA), the Interim IStation K-2th, iMSSA 3rd-8th, and the Assessment of Science Readiness (ASR) will be administered in compliance with State law.

Classroom Assessments

K-5th students will receive written assessments and rubrics surveys from their main teacher twice a year. Additionally, grade six through twelve semester benchmark assessments and instructional block assessments at all grade levels, whether by a 1-4 scale (6th-8th) or a letter grade scale (high school) will be administered throughout the school year. Classroom assessments are an integral part of the school-wide assessment program. Before a lesson or block is taught, the teacher will pose the work to identify the evidence that will be collected from students in order to demonstrate their knowledge and proficiency. The teacher will create the assessment and rubric to measure student outcomes. With these factors in mind, the teacher will plan the appropriate order of learning activities.

See Attachment 21 - Example of Grade-Specific Assessment Rubrics

Assessment results will inform future instruction. Instructional strategies will be used to challenge students to think at high levels and show acquired knowledge and skills. Example strategies include effective questioning techniques; summarizing and notetaking; collaborative work; non-linguistic representations of key concepts and vocabulary; and effective homework practices. These strategies allow students to demonstrate their learning daily.

School-wide Assessment Strategies

Diagnostics in key areas, as noted above, will be given at key intervals throughout the year in core academic areas. Students will be challenged to demonstrate their attainment of specific skills and knowledge areas covered in the previous instructional period. These assessments are in close

alignment in both content and context with the MSSA. In addition to assessment of individual students, SMCS will implement a variety of measures for determining the success of the overall school program and the school staff.

Staff and Administrative Evaluations

To assure the highest quality education, at a minimum SMCS staff will be observed on an annual basis (more frequently for faculty who have worked at SMCS less than two years) and will participate in a self-evaluation process. Furthermore, staff will participate in a yearly Elevate NM teacher Evaluation (by NMPED).

References for this section:

Stiggins, Richard J. (1999) "Assessment, student confidence, and school success." The Phi Delta Kappan 81, no. 3 (1999): 191-198.

H. (2) Analyzing Assessment Data

Provide a **clear, comprehensive, and cohesive** description of the how assessment data will be analyzed

DATA REPORTING AND USE

The teachers at SMCS will be included in data analysis at the aggregate level when appropriate and encouraged to participate in ongoing program evaluation. Changes to curriculum, methods, and other teaching mechanics will be implemented based on faculty suggestions grounded in the analysis of data with the goal of Improvement in student learning outcomes. In addition, results from benchmark assessments will be analyzed by faculty and used to adjust in pacing guides, and intervention services to students. The guiding principles of public Waldorf education and their use to deliver Common Core State Standards (CCSS) will be consistently evaluated by teachers and staff. Student achievement data will be disaggregated annually to clearly identify the academic performance of students by sub-groups (e.g., by ethnicity, gender, English Learners, foster youth, socioeconomically disadvantaged students, and students with disabilities). As well, teachers and staff will analyze data at the individual level in order to properly address specific areas of growth and/or deficiencies of particular students.

- Templates & Distribution – so that faculty and administrators may create, save, and reuse communications templates. Generate an email or mail merge letter to a class, or whole school or Verify, notification receipt, and map the location of the recipient.
- Permissions – In order to control information access and tools utilized and viewed with tiered permission groups.
- Automated or Ad Hoc Reports – so that administrators can use automated report generation or pull reports manually at any time as well as create their own ad hoc reports utilizing filters such as grade, gender or age by performance, discipline, attendance, demographics, class size, and enrollment numbers.

H. (3) Student Progress Communication Plan

Provide a **clear, comprehensive, and cohesive** student progress/ achievement communication plan

Parent Involvement

SMCS will conduct parent surveys annually, at a minimum, to measure the satisfaction of and solicit feedback from the parent community.

Data Reporting and Use

SMCS will utilize an appropriate Student Information System, indicated in our budgets, to track student learning and growth, household characteristics, as well as manage and report this data. The system will provide all necessary individuals the ability to access the data in real time so that families may access up to date information. Wherever appropriate, the data collected will be used to fine tune SMCS's assessment process and monitor the progress of our students. At select intervals throughout the school year, SMCS will provide paper communication to families who may have limited internet access to alleviate issues with accessibility. The Head of School will ensure proper maintenance of the Student Information System in accordance with SMCS's mission and vision. Some of the features of the SIS which SMCS plans to utilize will be:

- Alerts & Notifications – in order to send alerts and notifications to staff, parents and students. (via Email, Text, or Voice Message)
- Attendance tracking
- Grades and more

II. Organizational Framework

A. Governing Body Creation/Capacity

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

A. (1) Governance Structure

Summarize and incorporate **all** key components of your governance structure.

SCHOOL GOVERNANCE STRUCTURE

Mission of the Board

The School Board's core responsibilities are the following: 1) monitor and review the school's adherence to its mission; 2) monitoring student performance over time; 3) maintaining the fiscal solvency and sustainability of the school; 4) maintaining legal compliance in all facets of the school, without offering legal counsel or legal authority; 5) monitoring the organizational performance and equitable goals of the school; 6) oversee broad questions of school policy; 7) reviews and approves the annual budget; 8) provide guidance to a to-be-formed Supporting Foundation in fundraising, and 9) elect new Board Members, as well as take responsibility for hiring, evaluating, and supporting the work of the Head of School. Included in our mission is the adherence to Public Waldorf Education's Core Principle #6 - "School leadership is conducted through shared responsibilities within legal structures."

Overview of Structure

The governance structure of Sun Mountain Community School shall be vested in a governing body called the School Board, which will have oversight on all matters fiscal and legal. The School Board shall adopt and be governed by its Bylaws, a draft of which is included as **Appendix A**. The School Board shall comply with all requirements of the New Mexico Open Meetings Act, N.M. Stat. Ann. §§ 10-15-1 to -4 (2023). The School Board is responsible for keeping SMCS's practices aligned with the law, the School's mission, and the charter contract with the State of New Mexico. The School Board shall provide oversight to the Head of School and the School generally to assure actions and decisions are mission aligned and centered on what is in the best interests of the students, families, and community. In addition, the School Board oversees the hiring of the Head of School, including recruiting, selection, removal, and evaluation. The School Board also oversees financial matters including approving the annual school budget and authorizing designees to sign checks and legal documents on behalf of the school, including regular monitoring of internal controls.

Membership Structure

In accordance with NMSA Section 22-8B-4(Q) and the Bylaws, the School Board shall have a minimum of 5 members at all times. The maximum membership per the Bylaws is 9. Members shall be recruited

and selected based on the basic membership requirements set forth in Section 3.0 of the Bylaws, and in more detail in section II.A(2) herein.

Officer Structure

There shall be four (4) elected officers of the School Board: a President, a Vice-President, a Secretary, and a Treasurer. Members may not hold more than one office.

Officers shall be elected as needed when vacancies arise by majority vote of the members in attendance at any meeting where a quorum exists, with care taken to hold elections at least 45 days prior to the expiration of any Officer's term so that the new officer may be on-boarded and trained prior to the departing Officer's departure.

A President is mandatory at all times, and any time the office of the President becomes vacant prior to a new President having been duly elected, the Vice-President shall become President as set out in more details in Section 12 of the Bylaws.

The Officers shall have the following powers and responsibilities:

The President shall preside at all meetings of the School Board. In the President's absence, the Vice-President shall preside. The President is responsible for setting the agenda for all meetings, calling any special meetings, and appointing members to chair all committees. The President may collaborate with the Head of School to set the agenda, however any member may request an item be added to the agenda and the President will add such item.

The Vice President shall collaborate with the President to set agenda items and shall be prepared to act as President in the President's absence.

The Treasurer shall have general supervision duties over the Board's finances and shall serve on the Finance Committee. The Treasurer shall also supervise the maintenance of the Board's financial records and books, and sign such instruments as required by the School's office.

The Secretary shall issue School Board meeting notices, and shall keep minutes, manage meeting documents, and perform any additional duties required by this position. The Secretary will ensure that School Board meeting minutes are available on the School's website within ten days of the meeting. They will also keep track of members' training hours.

Committee Structure

The School Board shall maintain standing finance and audit committees, as required by law, and any other committees required by law if additional requirements are adopted by the Legislature.

At inception, the School Board will have a Finance Committee, Governance and Ethics Committee, a School Performance Committee, and an Audit Committee, as set forth in more detail herein.

Each committee shall have at least two members, unless specified otherwise in the Bylaws and the detailed section one each committee herein. The Finance and School Performance committees may have members who are not Board members and are paid employees of the school with responsibilities in those respective areas, in addition to a Board member. The Audit Committee may consist of community members that are not Board members in order to obtain the required expertise.

Recruitment & Selection of School Board

One of the strengths of Waldorf education is community involvement. This will translate to membership in the SMCS's School Board. Through our community engagement, we will gain access to people from our community members' networks. This will lead to recruitment of capable, diverse, and competent board members. Please see Section II.A(3) herein for more details on the recruitment and selection process.

Terms and Limits

School Board Members shall be elected for 3-year terms. Terms will be staggered so that no more than 4 Board Members shall be up for election in any year. The first year of the three-year term is probationary. Every member will be assessed after their first year by the other members of the School Board. In year two, eligible members (determined so by the assessment) may join a committee, be voted into committee chair position, officer role, or other leadership role by the other members.

School Board membership shall be limited to 2 consecutive full 3-year terms. Former School Board Members shall be eligible for election after a lapse of 2 years. If the child of a parent member graduates from or disenrolls from SMCS during that Member's term, that parent member may serve the remainder of his or her term or may fill a community member position.

Member Resignation, Discipline, and Removal

A member may resign upon giving written notice to the President of the School Board. A School Board Member may be removed, with cause, by a vote of a majority of members. If a member misses four (4) consecutive meetings without an acceptable excuse, that position may be declared vacant by a majority vote of the other members in attendance in an open meeting. The Governance and Ethics Committee shall determine whether any member's absence at a meeting is excused.

School Board Representatives

The School Board may invite non-voting representatives from sub-groups of the SMCS's community (including current students, teachers, and parents) to the Board as non-voting representatives through a majority vote of Board Members. After the Board votes to include such a non-voting member from a specific sub-group, such representatives will be finally chosen by the sub-group at SMCS using an election or other democratic processes, where possible.

Committee Details

Finance Committee

Per NMSA 22-8-12.3, the Finance Committee shall serve as an external monitoring committee on budget and other financial matters. The duties of the Finance Committee shall also include making recommendations to the school board in the following areas:

1. financial planning, including reviews of the school district's revenue and expenditure projections;
2. review of financial statements and periodic monitoring of revenues and expenses;
3. annual budget preparation and oversight; and
4. procurement

The Finance Committee shall consist of no fewer than two members and must include the Board's Treasurer and the school's business manager (for SMCS the role of business manager is filled by the

Operations Coordinator/Director). In addition to Board Members, employee's of SMCS may serve on the Finance Committee.

At least one member of the Finance Committee shall have participated in the Charter School Fiscal Requirements training provided by the PED. The course is free and no costs or fees will be charged for attendance. This training fulfills the three hour requirement for continuing School Board members pursuant to 6.80.5.9(A)(2) NMAC. Additional details about the Finance Committee are set out more fully in Section III.C(3) herein.

Governance and Ethics Committee

The Governance and Ethics Committee (GEC) shall consist of at least two members and may only include Members of the School Board. All members shall participate in the Public Official/Charter School Board Ethics and Responsibilities training as well as the Open Government, Legal, and Organizational Performance Requirements training. These courses are free and no costs or fees will be charged for attendance. These trainings fulfill the one hour training requirement for continuing School Board members pursuant to 6.80.5.9(A)(1) NMAC and the one hour requirement for continuing School Board members pursuant to 6.80.5.9(A)(4) NMAC, respectively. The GEC is charged with referrals and recruitment of new Board members. The GEC will also hear Equity Audit reports after they are published on May 1st.

School Performance Committee

The School Performance Committee, also sometimes called the Academic Committee, shall consist of at least two members and may include members of the School Board and employees of SMCS with academic performance responsibility. All members shall participate in the Understanding and Evaluating Academic Data training, which is offered by PED for free and fulfills the two hour training requirement for continuing governing body members pursuant to 6.80.5.9(A)(3) NMAC. In addition to hearing reports on standardized test scores, the SPS will hear and evaluate SPED evaluation report that comes out every three years from the HOS which will include a) Compliance Evaluation, b) Student Outcome Evaluation, c) Evidence of Bias Evaluation, and d) Effectiveness of MLSS Evaluation.

Audit Committee

The Audit Committee shall consist of at least two members, at least one of the two members shall have expertise in financial matters and shall have attended the Charter School Fiscal Requirements training provided by the PED. Per NMSA 22-8-12.3, duties of the Audit Committee shall include overseeing yearly and special audits, report the findings to the School Board, and develop an action plan for any necessary changes in policy or practice. Details about the Audit Committee are set out more fully in Section III.C(3) herein.

Equity Council Representation - One School Board Seat

When possible, the School Board shall include one member from SMCS's Equity Council.

A. (2) School Board Member Qualifications

Enumerate the qualifications desired for governing body members.

SCHOOL BOARD MEMBER QUALIFICATIONS

Skill Sets for Membership

The SMCS School Board shall be composed of 5-9 members. As set forth in Section 3.2 and 3.3 of the Bylaws, at a minimum 1 member must be a professional educator and it is preferred that the Board membership consist of two professional educators. At minimum, 1 member must have a background in finance, public or private sector budget/fiscal operations, accounting or equivalent experience. It is preferred that at least 1-2 members be community members with strategic areas of expertise that support the mission and goals of the school, including Anthroposophy and/or Waldorf pedagogy. At any given time the school board shall strive to have 60% or less parents/caregivers of currently enrolled students serve on the School Board.

Qualifications

Members of the New Mexico community, at least 18 years of age, who do not receive compensation from the school are eligible to serve on the SMCS School Board. When evaluating potential members, the Council will not discriminate on the basis of race, ethnicity, color, religion, sex, sexual orientation, gender, gender identity, national origin, disability, or any other basis prohibited by law.

Competencies considered for membership will include educational administration, curriculum and instruction, business administration, finance, strategic planning, policy development, law, community relations, and other areas of strategic expertise, resources, and perspective needed to achieve the mission and goals of the school. The Governance and Ethics Committee, when evaluating potential, qualified members, will seek a membership composition that reflects the diversity of the school and greater Santa Fe communities.

Ensuring Long-term Success

- Roles, responsibilities, and operational procedures and organizational structures are clearly defined so that continual success is not dependent on any individual/s.
- On-boarding process equips new members with the knowledge and skills to take over formerly held roles and responsibilities should there be turn-over.
- Staggered terms. Terms shall be staggered so that no more than 4 Council Members shall be up for election in any year.
- The administrative structure will ensure the continuation of school functioning, despite changes made in School Board Membership.

Robust Membership

One of the strengths of Waldorf Education is community involvement, which will, over time, lead to a robust interest in serving on the School Board. Board members will act as ambassadors for the school's mission in the community. Throughout their term, they will disseminate information to the public of the school's work, always taking care to present the school in a positive fashion. In addition, that robust school community interest will flow out into the broader Santa Fe community and help recruit additional capable and competent members.

Time Commitments

School Board members must commit to 6-10 hours a month, including monthly meetings (2 hours), sub committee meetings (4 hours), and preparation and communication outside of meetings (4 hours).

List of Proposed Members and their Qualifications

- David Burling (Governance & Finance)
- Nicholas Stinson (Finance)

- Taylor Romens (Professional Educator)
- Kathleen Taylor (Professional Educator)
- Danielle Mansour (Finance and Public Sector Budgets)
- Mary Freitas (Governance)
- Doug Lynam (Finance)

Training

As set forth more fully in the Committee details in Section II.A(1) and in Section II.B(1) herein, School Board Members will undergo regular and required training on a variety of topics required by law and by the SMCS policy.

A. (3) Selecting New Board Members

Provide a **clear and appropriate process or plan** for selecting new governing body members.

SCHOOL BOARD RECRUITMENT PROCESS

Action Steps

The School Board of the Sun Mountain Community School seeks financial expertise, fund-raising capacity, and a board that is representative of our community and diverse enough to benefit from different points of view. The School Board also understands that a diverse and growing pool of candidates adds to the long-term success of a governance committee.

Although the Governance and Ethics Committee is charged with referrals and recruitment of new board members, all current board members continually observe their community to locate suitable recruitment prospects. Members act as role models while serving as ambassadors to enhance the profile of the organization and make its mission known. They should portray the board member's role objectively and accurately as well as present any challenges in positive terms. The School Board commits to an intentional and continual process of recruitment.

In order to continue diversifying ideas and perspectives, board members must reach beyond their personal networks of associates. Board members commit to deep networking through community organizations, the school's volunteer network, or leaders in the school's current or past communities. The Board may also include formalized search strategies such as posting the board position on a nonprofit board job search list such as the Santa Fe Community Foundation and Groundworks.org.

Cultivation Process

Based on the relationship with the potential prospect, the Board president will decide who will make the initial contact. Then, if a board member knows the prospective board candidate, they might invite the prospect to an informational meeting to share more about the organization, board service, and gauge interest. Only the full board can vote on a new board member. The Board president should follow-up with a letter and appropriate material describing the organization. Subsequent contacts can build on previous feedback. This may include an invitation to a special organizational event (concert, community festival), a tour of the school grounds, lunch with board members, or an invitation to attend a board meeting. Current Board members commit to be sensitive to the reaction of the prospect. If they clearly indicate that this is not the right time to take on additional responsibilities,

that will be accepted. In such a case, we would continue to stay in touch with the prospective board candidate and offer other ways to get involved with the school and revisit the board opportunity at a later time. Board cultivation can take more time for certain candidates.

Extending the Invitation to Join the Board

If the cultivation process has been successful and a prospect clearly indicates their willingness for consideration as an official candidate (after understanding the commitment), the governance committee presents the candidate to the full board for a vote. Voting on new board members will take place at least 30 days prior to the expiration of the term of a departing member in accordance with the Bylaws. In addition, voting to replace an unplanned vacancy shall take place as soon as possible as set forth more fully in Section II.A(1) herein.

After the board has approved membership, the President or another member of the Governance and Ethics Committee will extend an official invitation to the new board member.

School Board members will be selected in accordance with the following timeline:

- The School Board will hold a study session no less than three (3) months before a scheduled School Board member's term expires. The Governance and Ethics Committee shall assume responsibility to plan for continuity and member recruitment.
- Active recruitment may include the submission of nominations by current School Board members, word-of-mouth and direct personal solicitation, or notification via public media.
- Potential candidates may be asked to complete an application or submit a resume.
- Where possible, one month before the outgoing member departs the School Board will select the replacement member.
- 5 members required by law to constitute a full School Board

Timelines

- 3 months before term completion, a temporary selection committee is formed or the Board determines it will use the Governance and Ethics Committee to fill the vacancy/ies
- 1 month before term completion, selection occurs by a majority vote of the School Board

Responsible Parties

The President and Vice President are responsible for overseeing the membership recruitment and selection process. The Governance and Ethics Committee are responsible for referrals and recruitment.

The School Board President's Role in the Board Recruitment Process

The Board President, having the most intimate knowledge of the organization, will provide valuable assistance to the governance committee by helping assess the organization and the board's current leadership needs, identifying valuable prospects, and helping to inform and integrate new board members into their new roles. The Board President reports to and supports the board.

Current board members continually observe their community to locate suitable recruitment prospects. Governance and Ethics Committee members act as role models while serving as ambassadors to enhance the profile of the organization and make its mission known. They make suggestions to the Board three months before a member's term is up.

SCHOOL BOARD MEMBER EXPECTATIONS

Onboarding Process

- Upon selection, a newly elected member begins the onboarding process, including legally required training, introduction to the full board, and assignment of a “board mentor” who will assist the new member in their understanding of board policies and current issues.
- Each newly elected member shall shadow their mentor or an outgoing member for 30 days prior to the completion of the outgoing member’s term.
- Each newly elected member shall participate in a structured Board Orientation.

Orientation

All newly elected board members need a thorough orientation, no matter how extensive their previous board experience. The President and Vice President will organize the orientation for new board members. Orientation should include information on the roles and responsibilities of the School Board as well as specific information pertaining to the organization. A new board member will come to understand right away the School Board’s responsibilities and the School’s mission.

Board development is an ongoing obligation of the President and the School Board as a whole and one that ensures the board is filled with top-notch community leaders who are able and interested in appropriately governing the organization into the future.

The Board’s Role in Chartering and Re-Chartering

The School Board tracks all charter renewal deadlines and related dates. Progress reports will be provided regularly in the six months leading up to the renewal application deadline. The Board, who is responsible to review all academic, financial and organizational and equitable goals of the school, will be asked to give summaries of findings and goals to improve standards following such goals, as they are needed for the renewal process.

Board members will be asked to make themselves available to attend review boards with State charter authorizers.

Time Commitment

School Board members must commit to 6-10 hours a month, including monthly meetings (2 hours), sub committee meetings (4 hours), and preparation and communication outside of meetings (4 hours). Time commitments will increase to 12 hours a month in the months preceding and during the charter renewal process.

B. Governing Body Training and Evaluation

B. (1) Plan for School Board Training

Provide an **ongoing, clear, comprehensive, and cohesive plan** for annual governing body training.

BOARD MEMBER TRAINING

Plan for Onboarding Board Member Training

Proposed members will be well informed, throughout their nomination process, of their training requirements. They will be elected only with the agreement that they will fulfill their initial 10 training hours and their 8 hours of training in the following years. Because new charter applicant trainings will be scheduled between January and May during time of application, the Board will be formed and leadership positions will be elected in the fall of the implementation year. This way, Board members can begin accumulating their training hours before the first school year starts in August, 2025.

Under New Mexico law, different training requirements apply to new members of the School Board and for continuing School Board members. All School Board training must be approved by the Public Education Department and all members must annually meet training requirements in specified areas. All School Board members will receive governing body training courses provided by the PED Charter Schools Division (CSD) and/or Public Charter Schools of NM (PCSNM) related to fiscal and budgetary law and best practices. In addition, all SMCS School Board members will be required to take Waldorf-specific training for governing bodies on a case by case, year by year basis. An eventual Supporting Foundation may provide funding for this line item.

New School Board Member Training Requirements

New members of the School Board must comply with the New Mexico Administrative Code § 6.80.5.8 requirements for New Members on a charter school governing body, as follows:

1. New council members must complete 10 total hours of training within the first fiscal year (school year) of service.
 - a. New council members must complete a mandatory 7-hour training provided by the New Mexico Public Education Department (NMPED), which counts towards the ten hour total requirement.
 - b. Before the end of the first fiscal year of service each member must complete three additional hours of training provided by any approved provider or the NMPED.
2. NMPED recommends that each School Board gain approval to provide a three hour “onboarding” training course. The purpose of this onboarding should be to integrate a new School Board member into the school by familiarizing such member with the school’s governance structure and requirements, other School Board members, financial status (including budget), history, contract, goals, model, staff, strengths and challenges, and current academic, financial, and organizational performance.
3. If the three hours are not “onboarding” they must fall in one of these areas: ethics and responsibilities, fiscal requirements, evaluating and understanding academic data, open government, legal and organizational performance requirements, and/or Equity & Culturally and Linguistically Responsive practices.

Continuing School Board Member Training Requirements

New Mexico Administrative Code §6.80.5.9 requires the following for continuing members on a charter school governing body:

1. Every member must complete 8 hours of training annually provided by a provider that is approved by the Public Education Department.
2. Training courses cannot be repeated in multiple years.
3. School Board members should select and attend training courses based on specific areas of growth, such as governance and ethics, open meetings, finance and others.

4. School Board members from schools that meet specific performance requirements may become exempt from up to two (2) hours of training. This is recognition of quality governance.
 - School Boards whose schools have received an unmodified annual audit in each of the past three years with no material weaknesses, no multi-year repeat findings, and no significant deficiencies and received no more than two compliance findings in the current year are excused from two (2) of the three (3) hours on fiscal requirements.
 - At this time, the academic exemption is not being offered, but the PED has offered it in the past.

Figure 38 - Training requirements for first year of service on the Board

Number of Hours Required	Required Topic
One Hour	Public official/charter school governing body ethics and responsibilities.
Three Hours	Fiscal requirements
Two Hours	Understanding and evaluating academic data.
One Hour	Open governing and requirements regarding free public school education along with understanding and overseeing organizational performance.
One Hour	Equity & Culturally and Linguistically Responsive Education

IDENTIFYING SCHOOL BOARD TRAINING NEEDS

State Requirements

The School Board of the SMCS will adhere to Section 6.80.5 of the New Mexico Administrative Code (NMAC) requiring all charter school governing board members to receive training. Board members will participate in the training offered by the state throughout the year, 2025-2026 version of Fiscal Year 2024 Charter Schools Division Governing Board Training Schedule.

Monitoring and Feedback of the Onboarding Process

Once on board, they will have an initial meeting with the Board president to go over bylaws of the board before the new members second board meeting. They will also go over the current calendar of the NMPED board training while giving perspective of how each training will add value to the current board's goals and challenges.

The Board Secretary will be in charge of recording all Board member training and monitoring compliance with training required by law and SMCS's policy for each member. Individual board members will be responsible to report their completed training to the secretary. In February, the Secretary will bring members not in good standing to the President and a plan will be made and shared with said members to move them into good standing.

New Board members will be given a survey concerning the effectiveness of the onboarding process after 9 months of service. In this way, they can contribute to a continually improving onboarding process.

Costs of Trainings

NM PED provides free Board training on all subjects required by New Mexico law. In addition, SMCS may receive grant funds or philanthropic funds from a future Supporting Foundation to cover costs of Waldorf-specific and other additional training. Lastly, costs of extra training may come from the operating budget of SMCS if sufficient funds exist for such purpose.

B. (2) Annual School Board Self-Evaluation

Provide a **clear, comprehensive, and cohesive plan** for an annual self-evaluation of the governing body.

ANNUAL SCHOOL BOARD SELF-EVALUATION

Waldorf pedagogy relies squarely on self examination as a key component to learning and developing into a whole human being. The School Board at SMCS will reflect this core principle in its annual self-evaluation process. The self-evaluation will broadly require the School Board to take stock of its successes and positive lessons learned, as well as any failures or shortcomings. Waldorf pedagogy firmly believes that positive feedback is core to growth, and so the School Board will always look to the SMCS's successes, however shortcomings will also be analyzed with a mind towards continuous growth.

The School Board will engage in an annual formal self-evaluation, as well as informal evaluations as needed to foster and maintain a healthy, engaged community of teachers, students, families and community members. SMCS utilized resources from Charter School Board University, along with resources from the Alliance for Public Waldorf Education, in developing this Annual School Board Self-Evaluation plan.

Action Steps

Yearly, the School Board will administer a formal evaluation process, seeking feedback from five sub-groups who interact with the school: (1) parents/students (in collaboration), (2) staff, (3) teachers, (4) administrators, and (5) School Board and Equity Council members. The Board's evaluation process shall be overseen and managed by the Governance and Ethics Committee. The School Board will develop a written survey, available both on paper and using Google Forms, that is disseminated to the five relevant groups. This evaluation will begin in April of each year and will close mid-May. The results will be compiled and ready for the annual Board Training event each year, held in the summer months (Summer School Board Training). The School Board will use the results to develop priorities for the coming academic year as well as determine any training needs.

Timelines

Board Evaluation Calendar

July: Annual Summer School Board Training to develop goals for upcoming year and participate in training identified as needed from prior year's evaluation.

Late August: Board announces the year's priorities to Faculty and Staff.

November: Board self-evaluates its performance on identified priorities.

February: Board again self-evaluates its performance on identified priorities.

April: Board distributes written evaluations to all 5 sub-groups.

May: Board closes written evaluations and begins compiling data, with help from School administrative staff.

June/July: School Board identifies any training needs for upcoming Summer School Board Training session and plans for such training.

July: School Board participates in Summer School Board Training session, which includes pre-planned training on identified areas of needed growth and goal-setting session for next academic year.

Identified Criteria and Standards

Criteria

1. How well did the School Board and School do on the identified goals for the academic year?
2. Do community members feel their concerns and input were heard and addressed by the School Board?
3. Is the School Board managing the School in a way that improves student achievement and competence?
4. Is the School Board managing the School in a way that aligns with SMCS's mission and vision and in alignment with Waldorf principles?
5. Has the School Board managed the School in a financially sound manner?
6. Is the structure of the School Board right for the School's current growth plan?
7. Has the School Board managed its hiring and firing authority well, particularly in terms of hiring a Head of School that is competent, effective and aligned with SMCS's vision and mission?
8. Has the School Board worked to further and deepend diversity, equity and inclusion at the School and to assist the School in addressing gaps for at-risk learners?
9. Does the Membership of the School Board accurately reflect and hold the whole community?
10. Has the School Board compiled with New Mexico law for charter schools and any relevant internal policies?
11. Internal Questions for School Board Members Only:
 - a. Did members relate to each other and guests or visitors to School Board meetings or events respectfully and and in a professional manner?
 - b. Did the Board appropriately manage members' time, including by limiting extraneous or over-long discussion of matters?
 - c. Did the School Board accomplish key objectives set out for a given meeting or time period?
 - d. Did the Board keep SMCS's mission and vision in mind as the guidelight for all decisions and actions?
 - e. Did the School Board comply with its Bylaws and other internal policies?

Standards

1. Self- and Community evaluations will use a rating system (i.e. 1-5 scale, from poor to excellent) and questions aimed at fleshing out data on the above criteria.
2. In addition to scaled responses, there will be some opportunity for narrative and open-ended feedback in the evaluations.
3. Both scaled data and open-ended feedback will be aggregated and compiled into a format that is easy to digest.
4. The School Board will review the data and use it to prepare areas of focus for training, the School Board’s goal for the next academic year, and any recommendations the School Board has for the School.

PLAN FOR CONTINUOUS IMPROVEMENT

Through annual self- and community evaluations, areas in need of improvement will be consistently identified and addressed. Annual accountability assures things don’t fester or go dormant until they are emergencies. The School Board will hold its own and the School’s improvement, adherence to mission, and service to students as fundamental. The evaluations, and the goal-setting and training opportunities that flow from it, will assure continuous improvement is knitted into the very fabric of the charter school.

C. Leadership and Management

C. (1) Monitoring Organizational, Financial, and Academic Outcomes

Provide a **clear, comprehensive, and cohesive plan** for how the governing body will monitor organizational, financial, and academic outcomes.

MONITOR ACADEMIC PERFORMANCE

Monitoring Academic Tests Scores and Panorama’s SEL Surveys

The Board's role in the school's academic performance focuses primarily on monitoring and oversight, rather than being involved in the day to day and month to month processes of delivering the curriculum to the students. The Head of School will be the primary point of contact for the board. While creating the agenda, the Board President and Vice-President will dedicate agenda time at each monthly meeting for the Head of School. During that time, the Head of School will present the board with relevant information, updates, challenges, and academic policy issues that are required to keep the board up to date on the academic functions of the school. The Head of School may bring additional academic staff/faculty (i.e, Pedagogical Director, Special Education Director) in support of the presentation and will allot time for questions and discussion from the board. In alignment with mission goal #1, “Educating the Whole Child”, the School Performance Committee may wish to spend additional time assessing standardized tests and relevant educational surveys.

Changes to the Curriculum

In the structure of our proposed school, the Teacher’s Council headed by the Pedagogical Director, is given the responsibility of curriculum development and adherence to the Waldorf pedagogy. If changes to the curriculum are proposed from the Teacher’s Council, the Pedagogical Director will report these proposals to the Head of School who will report them to the School Board. Either the Head of School or the School Board can request the Pedagogical Director’s presence at an allotted time in a monthly meeting to explain such proposals. They can ask questions and follow up after its implementation. Anytime a curriculum proposal would affect state reporting requirements, Board approval will be required.

MONITOR ORGANIZATIONAL PERFORMANCE

Monitoring Proper Reporting

The Board's role in the school's organizational performance is to monitor and provide oversight for the organization's responsibilities. Primarily, the Board will be aware of all state and federally mandated reporting that is required throughout the year. The Board will not themselves be responsible for filing reports on the school’s behalf. The Head of School will be the primary point of contact for the board. During that time, the head of school will present the board with relevant information, updates, and challenges for reporting policies and issues that are required to keep the board up to date on the organizational functions of the school. The Head of School may bring additional academic staff/faculty (i.e, Pedagogical Director, registrar, Special Education Director, Operations Director) in support of the presentation and will allot time for questions and discussion from the board.

Monitoring Mission Goals

Furthermore, the Board will be responsible to review the school’s mission goals. Academic and Panorama’s Educational Survey reports will be given following all major testing/survey periods to address mission goal #1. These responsibilities will be given to the School Performance Subcommittee. To assess mission goal #2, the School Board will hear a report once a semester from the Head of School or the outreach administrative designee concerning our festival, parent teacher engagement events, and educational program surveys and targeted accomplishments in “Teaching the Whole Community”. This reporting will fall under the Governing and Ethics Committee.

MONITOR FINANCIAL PERFORMANCE

The School Board will provide monitoring and oversight for the fiscal performance of the school through the Finance and Audit Committees. Please see Section II-A(2) for specific duties of the Finance and Audit Committees.

The Head of School will be the primary point of contact for the School Board. While creating the agenda, the Board President and Vice-President will dedicate agenda time at each monthly meeting for the Head of School. During that time, the Head of School will present the board with relevant budgets, grant application progress, and any challenges to expected money flow. The Head of School may bring additional academic staff/faculty (i.e, Operational manager) in support of the presentation and will allot time for questions and discussion from the board.

MEETING AGENDAS & ANNUAL BOARD CALENDAR

Meeting Agenda

See Attachment 22 - Sample School Board Agenda

Annual Board Calendar

July

- Monthly meeting.
- Fiscal year begins.
- Operational year: Pre-start of school retreat to form year's goals and plans
- Equity Council member presents research and work to school for specific recommendations to meet their goals based on the CLR/SbD plan (NM PED Culturally and Linguistically Responsive Schooling by Design)

August

- Monthly meeting.
- Operational year: Board announces the year's priorities to Faculty and Staff.
- NM PED Charter School Division Governing Board Trainings

September

- Monthly meeting.
- Implementation year: first full board meeting. Board members will get to know each other and sign up for mandatory training.
- NM PED Charter School Division Governing Board Trainings

October

- Monthly meeting.
- Implementation year: officers are elected.
- NM PED Charter School Division Governing Board Trainings

November

- Monthly meeting.
- Implementation year: committees are formed.
- Operational year: Board self-evaluates its performance on identified priorities.
- NM PED Charter School Division Governing Board Trainings

December

- Monthly meeting.
- NM PED Charter School Division Governing Board Trainings
- Equity Council members present an assessment of their progress in meeting their CLR/SbD goals.

January

- Monthly meeting.
- Budget approval. 3 year look ahead and a specific next year budget.
- NM PED Charter School Division Governing Board Trainings

February

- Monthly meeting.
- Board member training report given from the Secretary to the President.
- Operational year: Board again self-evaluates its performance on identified priorities.
- NM PED Charter School Division Governing Board Trainings

March

- Monthly meeting.
- Operational year: Begin Head of School evaluation process

- NM PED Charter School Division Governing Board Trainings

April

- Monthly meeting.
- Board evaluation handed out to all 5 sub-groups.
- Operational year: Board distributes written evaluations to all 5 sub-groups.
- NM PED Charter School Division Governing Board Trainings

May

- Monthly meeting.
- Equity Council members present an assessment of their progress in meeting their CLR/SbD goals.
- Reporting given on Equity Audits
- Board closes written evaluations and begins compiling data, with help from School administrative staff.

June

- Monthly meeting.
- The School Board identifies any training needs for the upcoming Summer School Board Training session and plans for such training.

The following calendar items will be determined:

Academic reports

- Monthly
- Testing analysis, when tests are completed, reported
- Reports of analyzed scores.
- Bi-annual Panorama’s Educational Survey reports.

Financial reports

- Starts monthly. Can move to quarterly. The Vigil Group (CPA’s for Public and Charter Schools in NM) would be likely a consideration for consultation and report oversight.

Operational reports

- Monthly

Elections

- Recruit through implementation year.
- Full board ready to go by September of implementation year.
- Elections at least 45 days prior to the expiration of any officer’s term so that the new officer may be on-boarded and trained prior to the departing officer’s departure.

C. (2) Plan to Hire Head of School

Identify and provide a **clear, comprehensive, and cohesive** plan for hiring a Head of School.

PROCESS TO HIRE A Head of School

Action Steps

The School Board is responsible to hire the Head of School (HOS), for the first year and all subsequent years. Here is an itemized steps to complete that process:

1. Establish a Hiring Committee of the Board.
2. Organize Tasks, Assignments and Deadlines including those below among hiring committee members.
3. Prepare Final Job Description and Position Advertising Documents.
4. Place job listings in publications and on websites listed below in the “Advertising” section.
5. Receive applications and communicate with applicants regarding completion status.
6. Verify initial credentials and licensing for each candidate.
7. Determine first round interview candidates after the hiring committee reads, evaluates, and discusses viable applicants.
8. Schedule first round interviews for selected applicants.
9. After first round interviews are complete, the hiring committee selects finalists and notifies those not advancing.
10. Schedule finalist interviews and arrange schedule for the in person, on campus visit, along with accommodations for those coming from outside of the Santa Fe area.
11. Conduct in person, extended interviews with finalists.
12. Hiring Committee connects with all finalists references.
13. The Hiring Committee meets to discuss finalists, share information from references and make a choice for the position along with one alternate.
14. The Chair of the Hiring Committee contacts the person chosen and makes a formal offer.
15. If an offer is accepted, the contract is finalized and executed; if the offer is not accepted, the Hiring Committee will contact the chosen alternate to make a formal offer.

Timelines

The Sun Mountain Community School understands the care needed to carefully advertise for, vet, and select an excellent HOS. Board will begin the above process of hiring a new HOS (beginning with selecting a Hiring Committee) six months ahead of the start of contract. The Chair of the Hiring Committee will make an offer no later than two months ahead of contract start. The HOS will be asked to notify the board their plan to leave a year in advance. An unplanned resignation of the HOS at any time would involve finding an interim HOS, probably from within, to serve out the remainder of the year, and then start the hiring process immediately to find a permanent replacement for the start of the subsequent year.

Responsible Parties

The entire Board will take responsibility for choosing the Hiring Committee members and for offering support and administrative help to those on the Hiring Committee. The Hiring Committee is responsible for the process outlined above and any additional steps required.

Head of School QUALIFICATION

Leadership Characteristics

The Sun Mountain School Head of School should exhibit all of these personal and professional skills and attributes:

- A background in Waldorf Education is ideal, but not required. If not Waldorf trained, candidates should have an eagerness to learn about and embrace Waldorf in order to be both a compelling spokesperson for the school, and a trusted leader by the faculty.
- A leader with entrepreneurial instincts to lead a new school but who can harness that entrepreneurial spirit within the framework and requirements of the State of New Mexico PED.

- A collaborative, inclusive leadership style that prioritizes listening in the decision making.
- The ability to make decisions in a timely manner and effectively communicate what those are and why they were made.
- A passion for, and strong experience with Diversity, Equity, Inclusion and Justice (DEIJ) practices.
- A systems thinker, able to oversee a professional administration that is both responsive and fiscally prudent.
- A leader experienced in designing an excellent administrative structure. Someone who can develop the best-practices relationship between the Head and the Board.
- An excellent, charismatic communicator, able to tell the school’s story, celebrate student outcomes, and reassure prospective parents.
- A skilled problem-solver, mediator-when-necessary, and someone who is accessible and willing to listen to everyone.
- Financial literacy sufficient to manage the budget; fundraising experience sufficient to lead the development of a culture of philanthropy within the school community.
- A leader with school experience in classroom and administrative roles who understands school ecosystems and their special dynamics.
- Experience with and interest in working with a diverse student and parent body, both in heritage and financial resources.
- Other plus factors:
 - Bilingual English/Spanish
 - Special Education literacy and experience
 - School or non-profit Board experience

Educational Background

The Sun Mountain School Head of School will possess the following educational background:

- A Bachelor’s degree from an accredited college or university
- An Educational Administration (K-12) licensure, or a pathway toward its completion before the school opens in August 2025.
- Preference for a Master’s degree from an accredited college or university in any field, with preference for education, arts & sciences, social work.

Experience

The Sun Mountain School Head of School will possess the following professional experience:

- Required: 2-5 years minimum school administrative experience broadly defined including Head of School, assistant Head of School, dean of students, director of social work or special education.
- Preferred: 1-3 years working with K-8 students in teaching and/or admin roles.
- Preferred experience: educational business experience.

ADVERTISING THE POSITION & ONBOARDING

Equitable Advertising

Sun Mountain School will advertise the Head of School position on appropriate local, regional, and national outlets to ensure wide and equitable access for all potential candidates. Advertising will occur over a minimum of two months before applications close. Local/regional advertising will occur in the *Santa Fe New Mexican*, *The Albuquerque Journal*, *The Taos News*, The Santa Fe Community Foundation Jobs Board, and the Groundworks New Mexico jobs board. In addition, the job listing will

be posted on the ACES Education Services Jobs Board and Waldorf specific job boards, including the National Alliance for Public Charter Schools, Association of Waldorf Schools in North America, and Waldorf Today. More general audience job posting will occur on LinkedIn and Indeed.

Applicants will submit a resume, cover letter, a writing sample, three professional references, one personal reference, proof of licensure, and post-secondary transcripts.

Interview Process

After initial review of applications including verification of education and licensing, first round candidates will be selected and invited to an interview of one hour duration conducted remotely. Applicants not moving on to the initial interview pool will be notified. 2-3 members of the founding Board will lead these initial interviews.

After initial interviews are complete, the Board will select 2-3 finalists for an in person process on the campus for extensive conversation and interview with the full board and smaller subgroups of the board over a one or two day period. Initial interview candidates not moving to the finalist pool will be notified.

Following the finalist interviews, the Board will choose the candidate to whom it will offer the position. References will be interviewed before the formal offer is made. The Board will also make a secondary selection should the chosen candidate choose not to accept the position.

Once an offer has been accepted and contract executed, the Board will publicly announce the name of the Head of School.

On Boarding Instructions for Relationship with Board

The new Head of School and the Board will meet extensively to set out the separate duties of the Board and the Head of School, the expectations for each, and the processes through which those duties will remain distinct.

Of primary importance is clear definition of the roles of the Board and the Head of School as described below:

The Governing Board shall concern itself primarily with the broad questions of policy oversight and with the appraisal of results, rather than day to day operations of SMCS. The board will ensure that the school has a valid charter, that it addresses the requirements listed in its charter, and that it adheres to the NM Public Education Code (NM PEC).

The Head of School will have primary responsibility for all aspects of the schools operation and programs, including the day-to-day management, operations and implementation of the schools charter and the Governing Board policies. The teachers and staff of SMCS will report to the Head of School, except in cases where there is a conflict of interest between the Head of School and a staff member. In such cases, the School Board will establish a reporting chain to eliminate the conflict.

In addition, as part of the onboarding process, the Board and the new Head of School will review the charter contract to assure there is mutual agreement on, and understanding of, the responsibilities and obligations contained therein.

C. (3) Governing Body Roles & Responsibilities vs. Head of School

Describe how the governing body will convey and distinguish their roles and responsibilities with those of the proposed school's Head of School.

PROCESS TO DISTINGUISH ROLES & RESPONSIBILITIES

Specific Actions to Ensure the HOS Understands Obligations of the Charter Contract

The role of Head Administrator, or Head of School, is a position that is annually reviewed by the Sun Mountain Community School Board in accordance with NMAC 6.29.1.9 requirements. SMCS will follow the delineation of duties between the Head of School and the School Board, as outlined in NMAC 6.29.1.9. The sitting Head of School will be rehired annually contingent on performance each year. The School Board will outline the expectations and the duties of the Head of School through the annual contract, which will be signed by both the Head of School and the Board president as representative for the full School Board, prior to the start date on the contract. In addition to the job description, the contract will include the compensation, benefits, confirmation of a cleared background check and fingerprints, and the evaluation process and criteria for success for the Head of School's annual evaluation. The job description will be reviewed and adjusted annually by the School Board, with the compensation and benefits being reflected in the annual budget.

The Head of School will be rehired from year to year. The responsibilities and qualifications for the Head Of School for Sun Mountain can be found in Appendix B: Head Administrator Job Description. The School Board will review the Head Administrator Job Description annually, adjusting the description as is needed to adequately reflect the responsibilities of the position and the mission of the school. In addition to the outlined requirements above, the Head of School must demonstrate a clear understanding of the commitment the school has made to the Public Education Commission via the charter contract and parameters of the charter application.

When the Head of School is a new hire, part of the application process will include a review and evaluation of the Sun Mountain Community School charter contract, to ensure that the prospective Head of School is clear about the promises he or she is committing to by accepting the position. The candidate will be asked interview questions about the charter application, including situational questions aimed at revealing how the candidate would ensure that the promises of the charter are being fulfilled. Prior to hiring, the successful candidate will be asked to commit to ensuring SMCS upholds the expectations and goals of the charter.

For a Head of School who is continuing employment at SMCS, the Head of School will review the promises outlined in the charter contract, and develop targeted goals aligned to the charter contract, during their annual review with the School Board. The Founding Team of Sun Mountain Community School recognizes that as a Local Educational Agency (LEA), the Head of School of SMCS will be responsible for the duties of a Superintendent, as outlined in NMSA 22-5-14, as well as that of a Head of School, as outlined in NMSA 22-10A-18.

The School Board's Role in Chartering and Re-Chartering

The School Board tracks all charter renewal deadlines and related dates. Progress reports will be provided regularly in the six months leading up to the renewal application deadline. The Board is

tasked with providing summaries of findings and goals to improve standards to meet SMCS’s goals as part of the renewal process.

Board members will also be asked to make themselves available to attend review boards with State charter authorizers.

See **Appendix B**, Job Description and list of expectations.

C. (4) Annual Evaluation of Head of School

Identify and provide a **clear, comprehensive, and cohesive** plan for annually evaluating the Head of School.

ANNUAL EVALUATION OF HEAD ADMINISTRATOR

Action Steps

How to Evaluate Effectiveness

New Mexico statute mandates the criteria for annual school administrator evaluation (NMSA 22-10A-19). Further, the state has developed administrative codes to provide guidance for implementing the statute (NMAC 6.69.7.8 and NMAC 6.69.7.9) SMCS will use the NMPED evaluation program to evaluate the Head of School. Currently, that evaluation is the The High Objective Uniform State Standard of Evaluation (**HOUSSE**) Forms and Processes; however, NMPED is changing their evaluation program/forms to a system called Excel NM for the school year 2024-2025. SMCS will adopt Excel NM or whatever is the current active evaluation process for its first evaluation year in 2025-2026.

This system provides a comprehensive framework for a thorough, reflective process and ensures the school’s mission and goals are being met equitably.

The Board is free to adopt a different evaluation system or adapt the existing one if it determines after the first two years that all its evaluative needs are not being fully met.

Timelines

The Head of School (HOS) evaluation process will begin each year during the March-April timeframe to ensure the evaluation is complete well in advance of the HOS contract renewal. The Board will inform the HOS of the exact dates each year before the end of the first semester and place those dates on its own calendar; in addition the Board will assign members to lead the process and establish the workflow.

Responsible Parties

Plan meets NMAC 6.69.7.8 and 6.69.7.9 requirements

The Board, in active coordination with the HOS, will facilitate the full and timely implementation of the HOS evaluation process. It is essential that the Board ensures its timelines are met so as to have ample time to review the evaluation with the HOS and make a determination for contract renewal or non-renewal.

Identified Criteria/Standards

The Board will rely on the criteria and standards built into the NMPED evaluation program, which will be Excel NM for SY 2025-2026.

See Attachment 23 - Evaluation template.

Maintenance in the Council's Annual Calendar Process

The Board will be charged with calendaring the HOS evaluation process at the beginning of each school year, in consultation with the HOS.

D. Organizational Structure of the Proposed School

D. (1) Organizational Chart and Narrative

Provide a **clear, comprehensive, cohesive, and reasonable** organizational chart and narrative.

ORGANIZATIONAL CHARTS

The Organizational Charts outlined below include the titles of each position, direct reporting relationships as well as advisory communications for all staff, faculty and essential entities associated with school operations from Year 1 through Year 5 of operations. SMCS plans to meet our enrollment capacity by Year 3 of operations, at which point, SMCS will endeavor to bring essential functions that may be contracted services in Year 1 and Year 2 as full-time or part-time positions within the school. The SMCS School Board is responsible for the hiring, evaluation, and accountability for the Head of School position. Apart from the Head of School, per NMSA 22-10A-18, all hiring, evaluations, and accountability is the responsibility of the Head of School, as is stated in NMSA 22-8B-10. SMCS will follow the delineation of duties between the Head of School and the School Board, as outlined in NMAC 6.29.1.9.

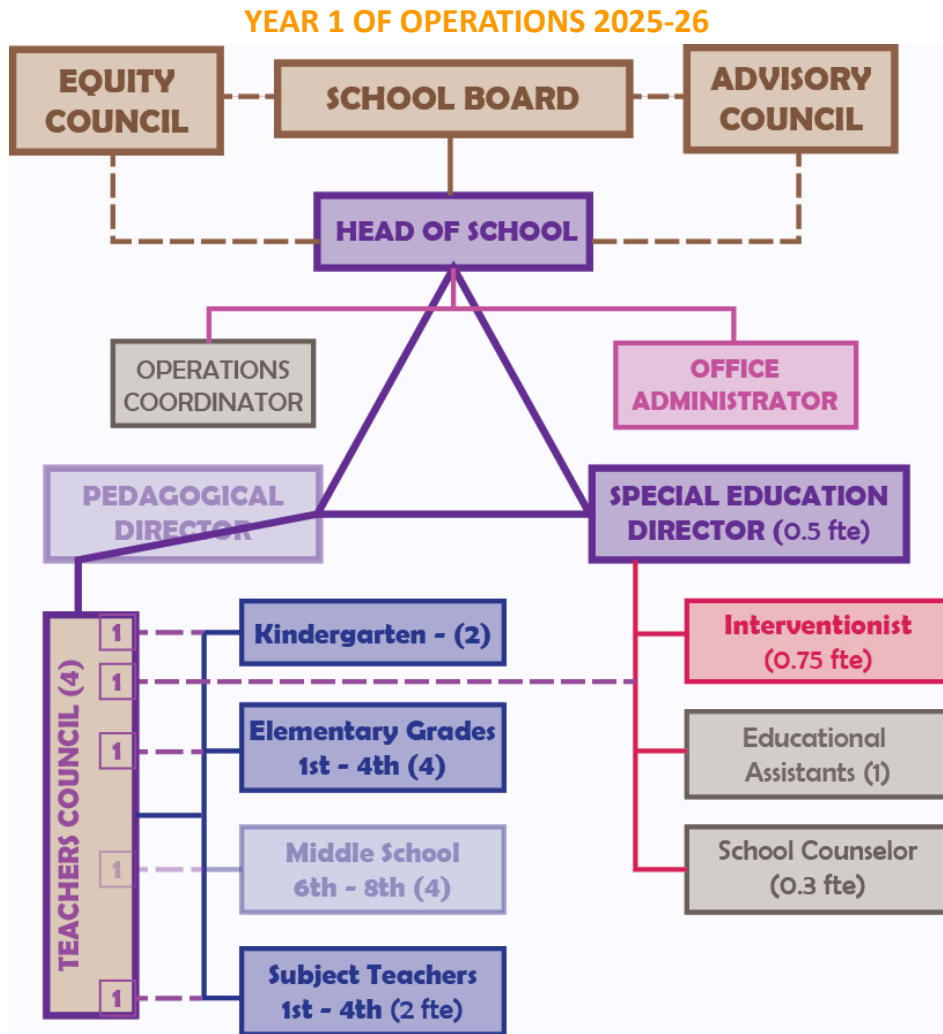
The overall organizational structure of Sun Mountain Community School is envisioned as follows:

- **Oversight/Advisory Team:** This includes all entities that are *not* involved in the day-to-day running of the school. These entities serve in an oversight capacity, overseeing the work of the Head of School and/or the School Board, or in an advisory capacity, providing the School Board and the Head of School with essential feedback, resources and best practices pertaining to their responsibilities.
- **Leadership Team:** This includes all positions involved in the day-to-day running of the school and meeting the performance and business standards of SMCS's charter. All of the major decision making, including hiring and firing of all other employees is the responsibility of this team.
- **Operations Team:** These positions report directly to the Head of School. In Year 3 of Operations, SMCS will endeavor to bring this entire team in-house as full-time or part-time employees. At that point, this team will manage enrollment, budgets, communications, school transcripts and other administrative matters as designated by the Head of School.
- **Teaching Faculty:** This includes all class teachers and subject teachers for all grades. This group of employees reports to the Pedagogical Director.

- **Student Support Team:** This encompasses all student support services including, educational, social/emotional and behavioral support services. These positions report to the Special Education Director.

Descriptions of each component entity of the teams listed above are included after the organizational charts.

Figure 39 - Year one organizational chart



ORGANIZATIONAL CHART LEGEND

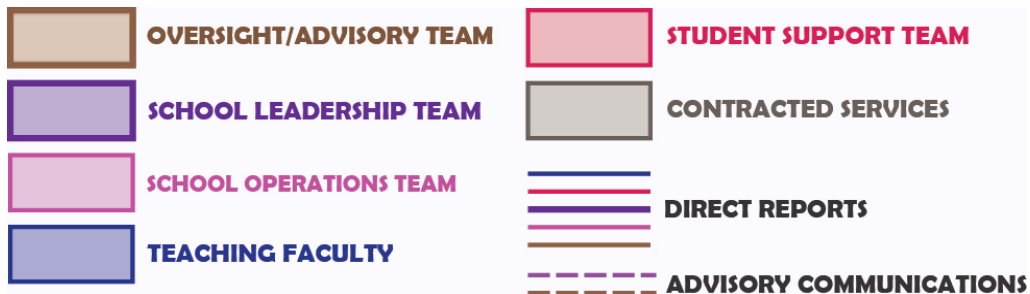
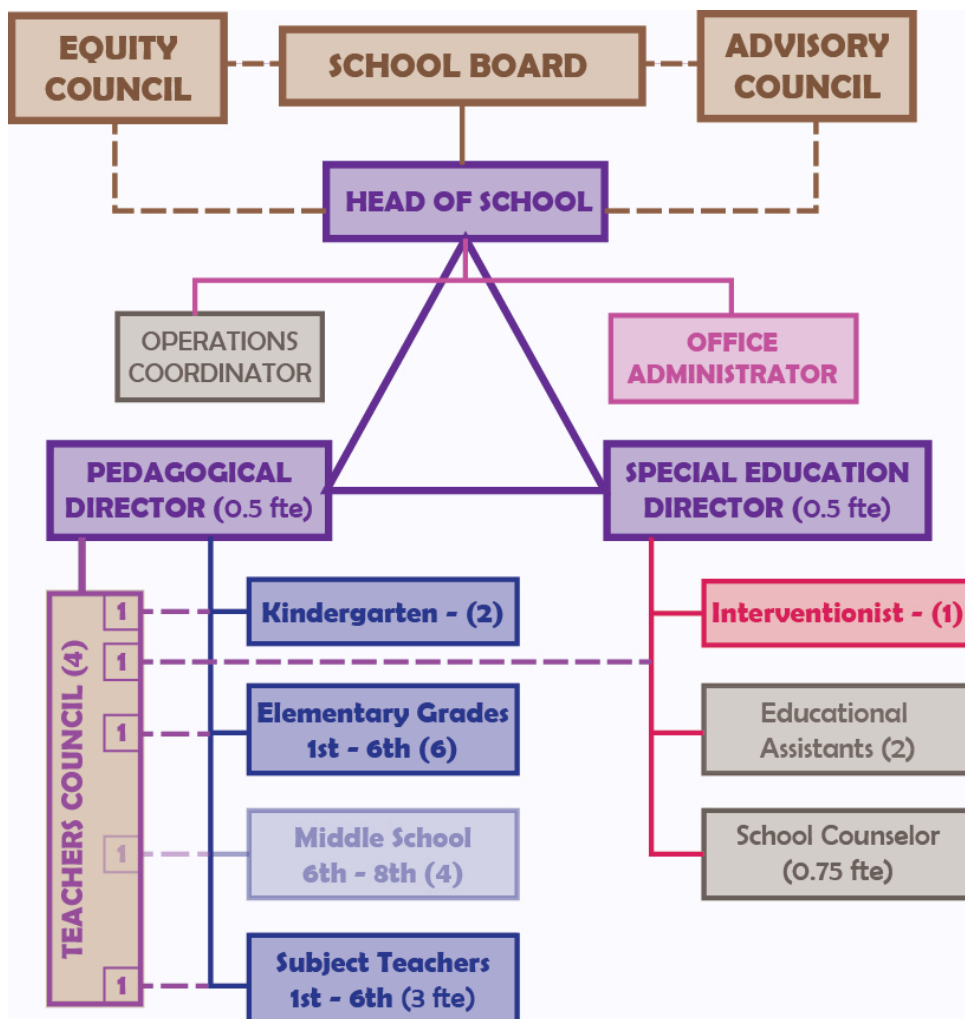


Figure 40 - Year 2 organizational chart

YEAR 2 OF OPERATIONS 2026-27



ORGANIZATIONAL CHART LEGEND

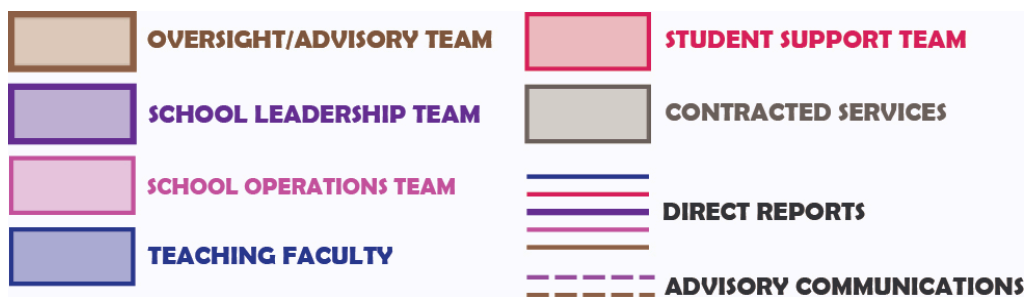
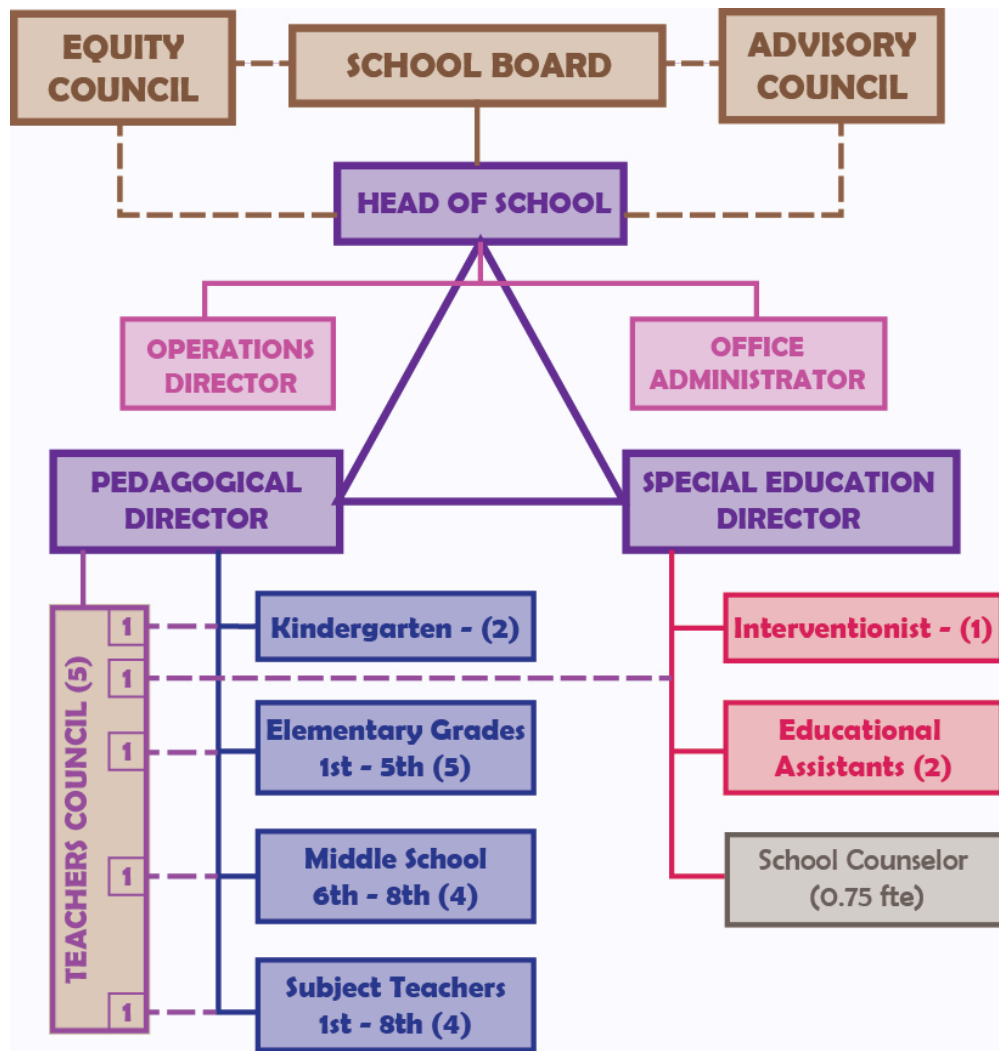
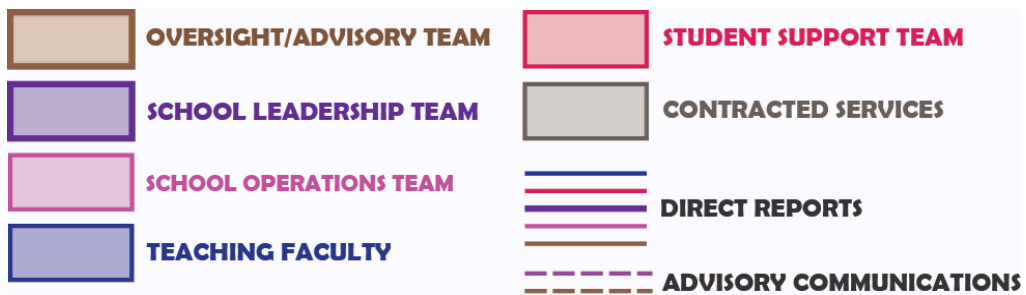


Figure 41 - Year 3 organizational chart

YEAR 3 TO YEAR 5 OF OPERATIONS



ORGANIZATIONAL CHART LEGEND



DESCRIPTION OF STRUCTURES AND RELATIONSHIPS

Oversight and Advisory Team

School Board

The SMCS School Board is the public organization responsible for ensuring that SMCS fulfills its mission as outlined in its charter. As a public organization the SMCS School Board will comply with the New Mexico Open Meetings Act. The two primary responsibilities of the School Board are:

(a) ensure reporting and compliance of the organizational, financial, academic and cultural health of SMCS to the PED, the PEC and our community.

(b) To hire, oversee and annually evaluate the Head of School of SMCS.

Apart from the implementation year, the School Board will typically not be involved in the hiring of any other members of SMCS staff or faculty. The Board will also set and approve salary schedules and annual budgets as well as approve personnel policies related to employment at SMCS. The SMCS School Board will consist of four committees – Finance, Governance and Ethics, School Performance (Academic) and Audit – see Section II-A(1) for description of these committees. Work done by and within these committees will be reported to the Board at monthly board meetings.

Advisory Council

The SMCS Advisory Council shall comply with NMSA 22-5-16 and be made up of SMCS families, SMCS staff, and community members with relevant expertise and experience. The SMCS Head of School shall chair the Advisory Council. The role of the Advisory Council is to assist the Head of School in making mission-aligned and school-specific decisions that further student well-being, success and outcomes. The Advisory Council will also provide an avenue for families and the community to provide input and feedback regarding the mission and performance of SMCS.

Equity Council

SMCS will establish an Equity Council with the purpose of advising the school on actions, solutions, and implementation of a culturally and linguistically responsive school framework that holds students' identity, culture, and language central to every design aspect of SMCS and in the work that we do as an LEA every day. If there is already a current charter school consortium established in Santa Fe, SMCS will join the consortium to better leverage resources, share best practices, and meet the needs of students. If a consortium is joined, SMCS will finalize its membership through Memoranda of Understanding. SMCS has used the guidance and framework outlined in these two documents to outline our Equity Council plan:

- 1) https://webnew.ped.state.nm.us/wp-content/uploads/2021/02/NMPED_EquityCouncils_Memo_11.22.19.pdf
- 2) https://webnew.ped.state.nm.us/wp-content/uploads/2020/06/CLR_SbD-Tool-2020.pdf

Teachers Council

The Teachers Council is an advisory body headed by the Pedagogical Director that is in charge of curriculum development, mentorship and self-study. The Teachers Council will have representation from all faculty and staff members that are involved in the direct education of SMCS students. The Teachers Council shall be made up of 1 kindergarten teacher, 1 elementary grades teacher, 1 middle school teacher, 1 subject teacher and 1 member of the Student Support Services Team. Membership of the Teachers Council shall be on a rotational basis for a minimum of 1 year terms. The Teachers Council shall interface with the School Board through the pedagogical director on all matters pertaining to the SMCS curriculum and pedagogy.

Leadership Team

Head of School

The SMCS Head of School (HOS) is responsible for executing the organizational, financial, academic and cultural vision for the school. In order to do this, the HOS must be an individual that closely aligns with the mission and vision of SMCS as described in its charter. Apart from the implementation year, the HOS will also be, in conjunction with the other members of the Leadership Team, responsible for the hiring, evaluation and implementation of corrective actions of all other members of the SMCS staff and faculty. The HOS is hired by the School Board and reports directly to the SMCS School Board.

Pedagogical Director

The Pedagogical Director serves as part of the Leadership Team. They are hired by the Head Of School in consultation with the School Board and report directly to the Head of School. The role of the Pedagogical Director is to lead SMCS in all pedagogical matters as delegated by the Board and in collaboration with other School entities. As the head of the Teachers Council, the Pedagogical Director ultimately provides leadership in the pedagogical realm of the school. They oversee the work of sections, departments and pedagogical committees, aid communication and cooperation among faculty, and respond to parental conversations related to pedagogy, and collaborate with the HOS on the hiring and dismissal of faculty.

Special Education Director

SMCS anticipates a special needs student population of approximately 20% with a wide spectrum of learning needs. Based on past experience of the Santa Fe Waldorf School and other Waldorf Charter Schools nationally, Waldorf schools tend to attract special needs students due to their focus on Whole Child Education. Consequently, SMCS is planning to build a robust Student Support Services program that works directly with and in support of our teaching faculty. The Special Education Director will be the head of the Student Support Team and also serve as part of the Leadership Team to be able to be a strong advocate for our students with special needs. The Special Education Director is hired by the Head Of School and reports directly to the Head of School. This individual will at a minimum hold a Level III NMPED Teaching license and/or an NMPED Special Education License. They will have a comprehensive understanding of special education best practice, compliance, reporting, parent and family engagement, and evidence-based practices for teaching and social, emotional, and behavioral support. They will oversee the work of all special education staff and will support their staff in the management, administration and reporting requirements of IEPs and accommodations for all special needs students, including English Language Learners. Where appropriate, this individual may also provide direct services to special needs students.

Operations Team

Operations Director/Operations Coordinator

The Operations Director will come on-board as a fulltime employee of the SMCS Operations Team in Year 4 of operations. SMCS will endeavor to begin the process of onboarding the Operations Director in Year 3 of operations to ensure a smooth transition to the proposed capacity staffing model. The Operations Director will be responsible for the planning, coordinating and managing of the day-to-day business operations of the school under the direct supervision of the Head of School. Effectively, this position includes the duties and responsibilities of the “Business Manager” of an organization. This individual will also be responsible for overseeing all aspects of school food services, transportation and procurement. In addition, they will also assist the Head Of School in pursuing grant opportunities and developing the annual and three year look ahead budgets. This individual will also attend board meetings at the invitation of the School Board as well as work directly with the Finance Committee

and Treasurer of the School Board alongside the Head of School. Once this is a full time position with SMCS, this individual will also be responsible for enrollment, outreach, recruitment and communications as well as student information systems and transcripts. In Years 1, 2 and 3 of operations, the budgetary responsibilities of this position will be handled by a contracted Business Manager, called the 'Operations Coordinator' in our Organization Charts, while the other responsibilities will be shared by members of the Leadership Team.

Office Administrator

The Office Administrator is a key supporting role within the school administration. This individual is responsible for the day-to-day administrative tasks that support the daily operations of the school, the Leadership Team, and once onboard the Operations Director. These administrative tasks may include but are not limited to documenting daily attendance, handling sensitive student documents, communicating with students, families and external stakeholders. The Office Administrator will engage in a variety of data reporting activities as required by state and federal programs through our student information systems and will support student recruitment and enrollment efforts, as well as family and community engagement activities. This individual will also be responsible in managing the school front office and provide excellent customer service to all SMCS families and visitors. The Office Administrator will work closely with the Operations Director and will report to the Head of School.

Teaching Faculty

Kindergarten Faculty

The SMCS Kindergarten Teacher will need to be an extraordinary individual capable of holding a class of very young children with the magic of a Waldorf-based kindergarten pedagogy while simultaneously preparing them for the academic rigor awaiting them in the elementary grades. They will have an intimate knowledge of CCSS and be able to deliver the great majority of them to students through the Waldorf methodology. This individual will need to work closely with the 1st Grade Teacher in order to ensure that all kindergarten students achieve 1st grade readiness. They will also need to work with the Student Support Team to identify and support students with special needs and recommend timely interventions. The Lead Kindergarten Teacher will be supported by an Educational Assistant who has expertise and experience with this particular age group of students. The Kindergarten Teacher and Assistant shall be hired by the Head of School in conjunction with the Pedagogical Director. Beginning in Year 3 of operations, the Kindergarten Teacher will report to and be evaluated by the Pedagogical Director. Until that point, they will report to and be evaluated by the Head of School. Kindergarten Lead Teacher will need to have or commit to obtain within a stipulated period of time: Waldorf Teacher Training for grades or Waldorf Early Childhood Teacher Training; and a NMPED General Education License for their grades band.

Please refer to Section II-D(2) for comprehensive job descriptions, including qualifications and experience, for the Kindergarten Faculty.

Elementary Grades Faculty

Class Teachers, also known as general education teachers, will teach grades 1 through 5, except in Y2 of operations when SMCS will employ Class Teachers for grades 1 through 6. In Year 3 of operations SMCS will add grades 7 and 8, at which point we will switch to the Middle School model for grades 6,7 and 8. As is typical in Waldorf schools, SMCS class teachers will follow a multi-year looping structure. The exception to this looping structure will be the 1st Grade teacher, who will be an expert in forming their class and building them up to transition into the higher educational rigor of grade school. Class teachers will take their class cohort starting in Grade 2 through Grade 5, and then loop back to Grade 2 to pick up a new class cohort for a new looping journey. Class teachers will be responsible for

accompanying their class on all field trips and camping trips, organize festival activities and support for their class, host quarterly parent evenings, and organize and hold parent teacher conferences. Elementary Grades Faculty will work closely with Student Support Services staff to ensure the best educational outcomes for all students, including students with special needs. Elementary Grades Faculty will report to and be evaluated by the Pedagogical Director in all years of operation, except for Y1 of operations when they will report to and be evaluated by the Head Of School. The Elementary Grades Faculty will need to have or commit to obtain within a stipulated period of time: their Waldorf Teacher Training for their grade band; and a NMPED General Education License for their grades band. Please refer to Section II-D(2) for comprehensive job descriptions, including qualifications and experience, for the Elementary Grades Faculty.

Middle School Faculty

Starting in Year 3 of operations, Grades 6, 7 and 8 will be taught by a team of 4 teachers. Middle School teachers will also follow a multi-year looping structure as a Homeroom Teacher with their class cohort, except they will teach all middle school grades solely in their content area. Eg: starting with Year 3 of operations, the Middle School Math Teacher will be the Homeroom teacher for the rising 6th grade, while teaching Math to Grades 6,7 and 8. This teacher will continue on as Homeroom Teacher for their class cohort through 8th grade. Once their class cohort moves on from 8th grade and on to high school, they will get a year off from being a Homeroom Teacher and loop back to pick up a new class of rising 6th graders as Homeroom Teacher in the following year. Homeroom Teachers will be responsible for accompanying their class on all field trips and camping trips, organize festival activities and support for their class, host monthly parent evenings, and organize and hold parent teacher conferences. Middle School Teachers will be hired by the Head Of School in conjunction with the Pedagogical Director. Middle School Faculty will report to and be evaluated by the Pedagogical Director. Middle School Faculty will need to have or commit to obtain within a stipulated period of time: Waldorf Teacher Training for their grade band; and NMPED Licensure for their specific content area and grade band.

Please refer to Section II-D(2) for comprehensive job descriptions, including qualifications and experience, for the Middle School Faculty.

Subject Teachers

Spanish, the practical arts - handwork and woodwork, movement (PE), and music are an integral part of the Waldorf curriculum. The inclusion of these “subjects” allow every student to have a potential area to shine in, enriching their daily experience at school. SMCS subject teachers will start as part-time faculty in Years 1 and 2 of operations, and will transition to full time beginning in Year 3 of operations, when SMCS will offer enrollment in grades K-8. SMCS subject teachers will teach grades 1-8 in their area of content with the following exceptions: music will begin in 4th grade; and woodwork will begin in 5th grade. SMCS subject teachers will have or commit to obtain within a stipulated period of time: Waldorf Teacher Training for their grade band; and NMPED Specialty Licensure for their specific content area and grade band. Music and Woodwork Subject Teachers may be contracted services.

Please refer to Section II-D(2) for comprehensive job descriptions, including qualifications and experience, for the Middle School Faculty.

Student Support Services

Special Education Teacher/Interventionist

This individual plays a key role in supporting the needs of SMCS’s diverse student body with expertise and experience in evidence-based instructional methodologies to teach students with a disability

defined under the federal guidelines. This individual will be responsible for administering, managing and reporting results from State mandated dyslexia screeners, and in providing support services to special needs students, gifted students, and English language learners. This individual will be hired by, report to and be evaluated by the Special Education Director. Ideally, this individual should have a CALT or a CALP certification from the Academic Language Therapy Association. Knowledge of Waldorf pedagogy is preferred. An ideal candidate will also have a Waldorf Learning Support Certificate (a three year training in Waldorf Pedagogy approach to Special Education).

Educational Assistants

SMCS will include multiple positions as Educational Assistants to provide student support within the classroom or as pull-out services. Educational Assistants will support class, subject and middle school teachers within their classrooms as needed, or work with students in one-on-one or small group settings. These individuals will also support the work of the Interventionist. These positions will be contracted services in Years 1 and 2 of operations. Starting in year 3 of operations, SMCS will endeavor to bring on 1-2 Educational Assistants as full time positions within the Student Support Services teams based on the needs of our student body. The Educational Assistants will be hired, report to and be evaluated by the Special Education Director. Educational Assistants must hold a valid Educational Assistant licensure from NMPED and meet the requirements set forth in NMAC 6.63.9

School Counselor

SMCS is committed to be a diverse, safe and welcoming community for students from all backgrounds. The School Counselor will play a key role on the Student Support Services Team in creating the community our students need and deserve. The School Counselor will be a qualified individual, certified to provide a school-level guidance program based on the American School Counseling Association National Standards and focused on the physical, social, intellectual, emotional, and vocational growth of each student. This individual must meet the licensing requirements set forth in NMAC 6.63.6, demonstrate some knowledge of Waldorf pedagogy and/or be interested and committed to learning more about Waldorf education best practices. The School Counselor will be hired by the Head of School in conjunction with the Special Education Director. They will report to and be evaluated by the Special Education Director. This position may be a contract position.

D. (2) Job Descriptions of Certified and Licensed Staff

Provide **clear, comprehensive, and cohesive** job descriptions for all certified and licensed staff and any other key staff (if your charter requires non-traditional roles or positions, identify and describe here).

See **Appendix C** for Job Description of all SMCS Staff Members.

CERTIFIED STAFF & FACULTY

Head of School

The SMCS Head of School (HOS) is responsible for executing the organizational, financial, academic and cultural vision for the school. In order to do this, the HOS must be an individual that closely aligns with the mission and vision of SMCS as described in its charter. Apart from the implementation year, the HOS will also be, in conjunction with the other members of the Leadership Team, responsible for the hiring, evaluation and implementation of corrective actions of all other members of the SMCS staff and faculty.

Minimum Qualifications

- Bachelor's Degree (Masters preferred)
- NM Educational Administration License (PreK-12)
- Background check and state required fingerprints

Essential Qualities

- Commitment to, belief in, and alignment with the mission of the school, its goals, and public Waldorf education.
- Ability to build a strong, cohesive school team environment built on trust with a willingness to lead by example

See **Appendix B** for Head Of School Job Description.

Pedagogical Director

Pedagogical Director is responsible for ensuring mission consistency in relation to program and curriculum. Their role is to lead SMCS in all pedagogical matters as delegated by the Board and in collaboration with other School entities. As the head of the Teachers Council, the Pedagogical Director ultimately provides leadership in the pedagogical realm of the school. He/She oversees the work of sections, departments and pedagogical committees, aids communication and cooperation among faculty, and responds to parental conversations related to pedagogy, and the hiring and dismissal of faculty. This position requires a commitment to Waldorf education and Anthroposophy, the mission and vision of the school, enthusiasm for collaborative working, and strong computer and organizational skills.

Minimum Qualifications

- Bachelor's Degree (Masters preferred)
- Waldorf Teacher Training Certificate
- Expertise in federal and state assessments
- Background check and state required fingerprints

Preferred Qualifications

- Master's Degree
- Waldorf Leadership Training Certificate or commitment to complete within 5 years of hire
- NMPED Teaching License
- Spanish proficiency preferred

Special Education Director

The Special Education Director will be the head of the Student Support Team and also serve as part of the Leadership Team to be able to be a strong advocate for our students with special needs. The Special Education Director is hired by the Head Of School and reports directly to the Head of School. This individual will at a minimum hold a Level III NMPED Teaching license and/or an NMPED Special Education License. They will have a comprehensive understanding of special education best practice, compliance, reporting, parent and family engagement, and evidence-based practices for teaching and social, emotional, and behavioral support. They will oversee the work of all special education staff and will support their staff in the management, administration and reporting requirements of IEPs and accommodations for all special needs students. Where appropriate, this individual may also provide direct services to special needs students.

Minimum Qualifications

- Bachelor's Degree

- NMPED Special Education License
- Expertise in administering and managing IEPs
- Background check and state required fingerprints

Preferred Qualifications

- Master’s Degree
- Spanish proficiency preferred

Operations Director

The Operations Director will be responsible for the planning, coordinating and managing of the day-to-day business operations of the school under the direct supervision of the Head of School. Effectively, this position includes the duties and responsibilities of the “Business Manager” of an organization. This individual will also be responsible for overseeing all aspects of school food services, transportation and procurement. In addition, they will also assist the Head Of School in pursuing grant opportunities and developing the annual and three year look ahead budgets. This individual will also attend board meetings at the invitation of the School Board as well as work directly with the Finance Committee and Treasurer of the School Board alongside the Head of School. Once this is a full time position with SMCS, this individual will also be responsible for enrollment, outreach, recruitment and communications as well as student information systems and transcripts.

Minimum Qualifications

- Bachelor’s Degree
- School Business Official certificate
- Experienced in using bookkeeping software such as Quickbooks, student information systems, website building

Operations Coordinator (contracted)

The Operations Coordinator is a contracted position until the Operations Director can be brought onboard as an employee of SMCS. Job duties of the Operations Coordinator will include the business and financial operations that are assigned to the Operations Director position, as determined by the Head Of School in consultation with the Finance and Audit committees of the School Board. Effectively, this position is a contracted “Business Manager”. The remaining job duties of the Operations Director will be absorbed by the Head Of School and supported by the Office Administrator until the Operations Director is brought onboard as an employee in Year 3 of operations.

Kindergarten Faculty

The SMCS Kindergarten Teacher will need to be an extraordinary individual capable of holding a class of very young children with the magic of a Waldorf-based kindergarten pedagogy while simultaneously preparing them for the academic rigor awaiting them in the elementary grades. This individual will need to work closely with the 1st Grade Teacher in order to ensure that all kindergarten students achieve 1st grade readiness. They will also need to work with the Student Support Team to identify and support students with special needs and recommend timely interventions. The Lead Kindergarten Teacher will be supported by an Educational Assistant who has expertise and experience with this particular age group of students.

NOTE: For the Kindergarten Assistant position, Please see Educational Assistant Job description

Minimum Qualifications

- Bachelor’s Degree

- NMPED Elementary License (K-8)
- Commitment to complete Waldorf Teacher Training Certificate or Waldorf Early Childhood Teacher Training Certificate within 5 years of hire
- Passion for Early Childhood Education
- Background check and state required fingerprints

Preferred Qualifications

- Waldorf Teacher Training certificate or Waldorf Early Childhood Teacher Training Certificate
- Experience as a lead classroom teacher, preferably in a Waldorf school
- CPR/First Aid certification
- TESOL and/or Gifted Certification

Elementary Grades Faculty

SMCS class teachers will follow a multi-year looping structure. The exception to this looping structure will be the 1st Grade teacher, who will be an expert in forming their class and building them up to transition into the higher educational rigor of grade school. Class teachers will take their class cohort starting in Grade 2 through Grade 5, and then loop back to Grade 2 to pick up a new class cohort for a new looping journey. Class teachers will be responsible for accompanying their class on all field trips and camping trips, organize festival activities and support for their class, host monthly parent evenings, and organize and hold parent teacher conferences. Elementary Grades Faculty will work closely with Student Support Services staff to ensure the best educational outcomes for all students, including students with special needs.

Minimum Qualifications

- Bachelor’s Degree
- NMPED Elementary License (K-8)
- Commitment to complete Waldorf Teacher Training Certificate within 5 years of hire
- Demonstrated ability to teach to a variety of grade and skill levels
- Background check and state required fingerprints

Preferred Qualifications

- Waldorf Teacher Training certificate
- Experience as a lead classroom teacher, preferably in a Waldorf school
- Master’s Degree or equivalent professional experience
- CPR/First Aid certification
- TESOL and/or Gifted Certification

Middle School Faculty

Middle School teachers will also follow a multi-year looping structure as a Homeroom Teacher with their class cohort, except they will teach all middle school grades solely in their content area. Eg: starting with Year 3 of operations, the Middle School Math Teacher will be the Homeroom teacher for the rising 6th grade, while teaching Math to Grades 6,7 and 8. This teacher will continue on as Homeroom Teacher for their class cohort through 8th grade. Once their class cohort moves on from 8th grade and on to high school, they will get a year off from being a Homeroom Teacher and loop back to pick up a new class of rising 6th graders as Homeroom Teacher in the following year. Homeroom

Teachers will be responsible for accompanying their class on all field trips and camping trips, organize festival activities and support for their class, host monthly parent evenings, and organize and hold parent teacher conferences.

Minimum Qualifications

- Bachelor's Degree
- NMPED Elementary License (K-8) or NMPED Middle Level License (5-9) with endorsement
- Commitment to complete Waldorf Teacher Training Certificate within 5 years of hire
- Demonstrated ability to teach to a variety of grade and skill levels
- Background check and state required fingerprints

Preferred Qualifications

- Waldorf Teacher Training certificate
- NMPED Secondary License (6-12) with endorsement
- Experience as a lead classroom teacher, preferably in a Waldorf school
- Master's Degree or equivalent professional experience
- CPR/First Aid certification
- TESOL and/or Gifted Certification

Subject Teachers

Spanish, the practical arts - handwork and woodwork, movement (PE), and music are an integral part of the Waldorf curriculum. The inclusion of these "subjects" allow every student to have a potential area to shine in, enriching their daily experience at school. SMCS subject teachers will start as part-time faculty in Years 1 and 2 of operations, and will transition to full time beginning in Year 3 of operations, when SMCS will offer enrollment in grades K-8. SMCS subject teachers will teach grades 1-8 in their area of content with the following exceptions: music will begin in 4th grade; and woodwork will begin in 5th grade.

Minimum Qualifications

- Bachelor's Degree
- NMPED Specialty License (PreK-8) with endorsement
- Commitment to complete Waldorf Teacher Training Certificate within 5 years of hire
- Demonstrated ability to teach to a variety of grade and skill levels
- Background check and state required fingerprints

Preferred Qualifications

- Waldorf Teacher Training certificate
- Experience as a lead classroom teacher or subject teacher, preferably in a Waldorf school
- CPR/First Aid certification

Special Education Teacher(s)/Interventionist(s)

This individual plays a key role in supporting the needs of SMCS's diverse student body with expertise and experience in evidence-based instructional methodologies to teach students with a disability defined under the federal guidelines. This individual will be responsible for administering, managing and reporting results from State mandated dyslexia screeners, and in providing support services to special needs students, gifted students, and English Language Learners.

Minimum Qualifications

- Bachelor's Degree
- NMPED Special Education License (PreK-12)
- Background check and state required fingerprints

Preferred Qualifications

- 3-5 years experience in a similar position
- Spanish proficiency preferred
- CALT or CALP certification
- Waldorf Learning Support Certificate (a three year training in Waldorf Pedagogy approach to Special Education)

Educational Assistants

SMCS will include multiple positions as Educational Assistants to provide student support within the classroom or as pull-out services. Educational Assistants will support class, subject and middle school teachers within their classrooms as needed, and/or work with students in one-on-one or small group settings. These individuals will also support the work of the Special Education Teacher/Interventionist. In addition to these duties, Kindergarten Assistants will also support the Kindergarten Teacher in classroom management, classroom activities, student pick-up and drop-off, festival life and community events, and other duties as assigned by the Kindergarten Teacher.

Minimum Qualifications

- NM PED Educational Assistant License (PreK-12)
- For Kindergarten Assistant: Experience in an early childhood or kindergarten program
- Background check and state required fingerprints

Preferred Qualifications

- 3 years experience in a similar position
- Spanish proficiency preferred

School Counselor

The School Counselor will play a key role on the Student Support Services Team in creating the community our students need and deserve. The School Counselor will be a qualified individual, certified to provide a school-level guidance program based on the American School Counseling Association National Standards and focused on the physical, social, intellectual, emotional, and vocational growth of each student. This individual must meet the licensing requirements set forth in NMAC 6.63.6, demonstrate some knowledge of Waldorf pedagogy and/or be interested and committed to learning more about Waldorf education best practices.

Minimum Qualifications

- Master's Degree in School Counseling, or equivalent
- NM PED School Counselor License (PreK-12)
- Background check and state required fingerprints
- Fulfill continuing education requirement

- Uphold ASCA ethical and professional standards

Preferred Qualifications

- Spanish proficiency preferred
- Knowledge of Waldorf pedagogy
- Committed to learning more about Waldorf education best practices

UNLICENSED STAFF

Office Administrator

The Office Administrator is a key supporting role within the school administration. This individual is responsible for the day-to-day administrative tasks that support the daily operations of the school, the Leadership Team, and once onboard the Operations Director. These administrative tasks may include but are not limited to documenting daily attendance, handling sensitive student documents, communicating with students, families and external stakeholders. The Office Administrator will engage in a variety of data reporting activities as required by state and federal programs through our student information systems and will support student recruitment and enrollment efforts, as well as family and community engagement activities. This individual will also be responsible in managing the school front office and provide excellent customer service to all SMCS families and visitors.

Minimum Qualifications

- A minimum of two years’ experience working in an office environment, preferably in an academic setting.
- Detail oriented, with the ability to organize information, prioritize between multiple tasks, work independently and maintain strict confidentiality
- Experienced in using Microsoft Office Suite, Google Suite, Facebook, student information systems, website building software.
- Strong communication skills and the capacity to work effectively with staff, faculty, students and parents.
- First Aid/CPR certification

D. (3) Understanding Staffing Needs

Provide a **clear, comprehensive, and cohesive** staffing plan that demonstrates an understanding of the proposed school’s staffing needs.

STAFF HIRING PLAN AND PROCESS

Sun Mountain Community School is committed to providing the students of New Mexico with a public Waldorf education that aligns with New Mexico state standards. A cornerstone of achieving our mission and realizing our vision is to ensure that all teaching faculty have Waldorf Teacher Training as well as NMPED licensure in their content area and/or grade band. To that end, SMCS has created a mission and budget aligned staffing plan to ensure stability in growth and student achievement.

Staffing Plan

* Numbers in parentheses correspond to enrollment capacity. Our staffing plan has been budgeted at 75% of enrollment capacity for Year 1, 85% of enrollment capacity for Year 2, 95% enrollment capacity for Year 3, and 100% of enrollment capacity thereafter.

Figure 42 - FTE chart of faculty and staff

Position	Year 1 FTE (108)*	Year 2 FTE (156)*	Year 3 FTE (208)*	Year 4 FTE (208)*	Year 5 FTE (208)*
School Leadership Team					
Head of School	1.0	1.0	1.0	1.0	1.0
Pedagogical Director	0.0	0.5	1.0	1.0	1.0
Special Education Director	0.5	0.5	1.0	1.0	1.0
School Operations Team					
Operations Manager	contracted	contracted	Contracted +0.5	1.0	1.0
Office Administrator	0.75	1.0	1.0	1.0	1.0
Student Support Team					
Special Education Teacher/Interventionist	contracted	1.0	1.0	1.0	1.0
Educational Assistants	contracted 1.0	contracted 2.0	2.0	2.0	2.0
School Counselor	contracted 0.75	contracted 0.75	contracted 0.75	contracted 0.75	contracted 0.75
Teaching Faculty					
Kindergarten Teacher	1.0	1.0	1.0	1.0	1.0
Kindergarten Assistant	0.75	1.0	1.0	1.0	1.0
1st Grade Teacher	1.0	1.0	1.0	1.0	1.0
2nd-5th Grade Class Teacher	3.0	5.0	4.0	4.0	4.0
Middle School Math Teacher	0.0	0.0	4.0	4.0	4.0
Middle School History	0.0	0.0	4.0	4.0	4.0

Teacher					
Middle School Science Teacher	0.0	0.0	4.0	4.0	4.0
Middle School ELA Teacher	0.0	0.0	4.0	4.0	4.0
Grades 1-8 Spanish Teacher	0.5	0.75	1.0	1.0	1.0
Grades 1-8 Handwork Teacher	0.5	0.75	1.0	1.0	1.0
Grades 1-8 Movement Teacher	0.5	0.75	1.0	1.0	1.0
Grades 1-4 Nature Studies Teacher	0.5	0.5	0.5	0.5	0.5
Grades 5-8 Woodwork Teacher	0.0	0.25	0.5	0.5	0.5
Grades 4-8 Music Teacher	contracted 0.15	contracted 0.4	contracted 0.5	contracted 0.5	contracted 0.5

Since the Implementation Year is unique from all other years of operations, SMCS has developed a two-fold Staffing Plan, both of which are outlined in this section. The first path describes the staffing plan for the Implementation Year, the second describes the staffing plan for all subsequent years.

Post Authorization/Implementation Year

Recruitment for candidates will begin early in our planning year, and will be conducted on an ongoing basis, until all roles are filled. Our robust recruitment strategy will ensure that we find mission-aligned candidates with the tenacity to be a member of a founding staff. We will evaluate the effectiveness of our recruitment campaign as it progresses and retool our recruitment strategy as necessary.

Hiring of Head of School

Post Authorization, once the SMCS School Board has been formed, the Head Of School will be one of the first hires of the School Board. The School Board plans to have a Head of School selected by the end of November of 2024. The process and timeline for hiring of the Head Of School is laid out below:

- Upon formation, at the first Board Meeting, the SMCS School Board will set up a hiring committee of 3 members.
- The Hiring Committee will be responsible for handling the job postings, collection of applications, short listing candidates, and conducting phone interviews.
- The Hiring Committee will make a recommendation to the School Board by mid-October.
- The SMCS School Board will then have a second interview with the recommended candidate(s) in the second half of October.

- The School Board will select a candidate and make a job offer to them by the end of October.

Timeline

- Job posting and Recruitment: September 1, 2024 – September 27, 2024
- Submission of Interest Letters and Resumes: September 30, 2024
- Phone interviews: October 1 – 11, 2024
- Recommendation made to School Board: Week of October 14
- School Board interview(s) of recommended candidate(s): October 14 – October 31
- Offer made to selected candidate: November 1
- Acceptance and on-boarding: November 1 – November 30

Hiring of Leadership Team, Faculty and Staff

During the Implementation Year only, the School Board Hiring Committee alongside the Head Of School, will proceed with the hiring of other faculty and staff.

SMCS plans to leverage the 40 year legacy of the former Santa Fe Waldorf School (SFWS). The former pre-K through 12th grade private school has gathered a cohort of trained Waldorf teachers in and around the Santa Fe area. Many of these teachers also have NMPED licenses in their content area and/or grade band. SMCS reached out to former SFWS teachers through a survey to gauge their interest in employment at a public Waldorf charter school. Almost 90% of the respondents who took the survey were “interested” or “very interested” in teaching at SMCS. Based on this information, there is an existing pool of trained Waldorf teachers in the Santa Fe area, which SMCS plans to draw from. In addition, SMCS has been notified that a number of out-of-state interested Waldorf teachers have made inquiries of the former SFWS Board this past school year, of the possibility of future job opportunities. SMCS has received a list of these inquiries. The process and timeline of hiring other faculty and staff is outlined below:

- The Hiring Committee will advertise job postings for Year 1 leadership, faculty and staff positions in November, 2024.
- The Hiring Committee will collect applications, letters of interest, resumes and references, and compile them to present to the Head Of School.
- One of the first tasks of the Head Of School, post onboarding, will be to work with the Hiring Committee to hire all other Year 1 positions. This will begin in December by reading and sorting through all the applications received thus far to create a shortlist and schedule phone interviews.
- The Head Of School and the Hiring Committee will conduct phone interviews together.
- The Head Of School and the Hiring Committee will create a list of recommended candidates for final interviews.
- Job offers, pending background checks, will be made to selected candidates for each of the roles.
- Throughout the process, the Head of School will present regular updates to the School Board regarding the status and effectiveness of the staffing plan, positions that are filled and positions that remain.

Timeline

- Job posting and Recruitment: November 1, 2024 – until positions are filled

- Submission of applications, resumes and references: November, 2024 – until positions are filled
- Phone interviews: Scheduled to begin in January 2025 – until positions are filled
- Selection of candidates for final interviews: Starting mid-January – until positions are filled
- Final Interviews: Late January – until positions are filled
- Offers made to selected candidates (pending background checks): February 2025 – until positions are filled
- Acceptance and on-boarding: March 2025 – until positions are filled

Advertising and Recruitment

Head of School, faculty and staff positions for our first year of operation will be posted and advertised on various career, education, and teacher preparation websites including Santa Fe Community College, the University of New Mexico, New Mexico Highlands University, Northern New Mexico University, as well as other traditional and alternative licensure programs throughout the state. In addition, positions will also be advertised with national Waldorf organizations, including the Alliance For Public Waldorf Education, the Association of Waldorf Schools of North America (AWSNA), Waldorf Early Childhood Association of North America (WECAN), and Waldorf Today. SMCS will also advertise positions in local print resources, including the Santa Fe New Mexican, the Santa Fe Reporter, and the Albuquerque Journal; online job search engines like Indeed, schoolspring.com and Monster.com; and through social media platforms, like Facebook, LinkedIn, and Instagram. Our staff openings will also be posted on our school website, in our monthly newsletter, and our social network pages. As our recruitment campaign progresses, we will evaluate the effectiveness of each of these sources and retool our recruitment campaign as necessary.

Midyear Openings

If an opening occurs during the school year, the Head of School will expedite a plan for filling the vacancy. While filling a vacancy on our team will be a priority, we believe that the process for filling that position cannot be compromised. Therefore, the process for hiring midyear will follow the same progression: application packet, phone interview, followed by the final interview. In addition, mid-year for candidates in key teaching, leadership and student support positions may involve a school visit and tour as well as a demonstration lesson if necessary. SMCS plans to continuously solicit the application packets throughout the school year, which should expedite the process of re-hiring in case of mid-year vacancies/departures.

Subsequent Year Hiring

After Year 1 of operation, hiring candidates for all positions except for the Head Of School will be the responsibility of the Head Of School, supported by the Leadership Team. The Head Of School will work closely with the Operations Director to determine appropriate pay scales before advertising positions. Positions will be advertised as described in ‘Advertising and Recruitment’ paragraph above.

The process and timeline of subsequent year hiring will be as follows:

- It is the goal of SMCS to create a strong and supportive culture at our school to have a high percentage of teacher and staff retention.
- Following mid-year evaluations of faculty and student support staff, the Head Of School, supported by the Leadership Team, will meet with each member of faculty/staff to discuss their evaluations, growth plan, and whether they will be offered a contract for the next school year.

- Staff members will have one week after the meeting to accept or decline the contract extension, for the Head of School to determine the number of teaching positions that need to be filled for the following school year.
- The Head Of School will determine the positions that need to be filled based on the meeting with faculty and staff. The Head of School will endeavor to have this process complete by the end of January of the current school year
- Interviews will begin in February of the current school year with the goal of offers being extended by the end of April.
- Site visits, school tours and demonstration lessons will be scheduled in February or March.
- SMCS's goal will be to complete the hiring process for the subsequent school year by May 1st of the current school year.
- Families will be notified of hiring decisions as needed before the close of the school year.

Staffing Plan Alignment to the Budget

Payroll costs in the form of salaries, benefits and retirement forms the largest expenditure SMCS will incur. The staffing plan for SMCS is aligned to our budget and reflected in specific sections in our budget. The staffing structure of the school is in direct alignment to our mission, while still enabling us to keep a fiscally responsible budget.

Within our budget (see Appendix G: 5 Year Budget Plan) are line items for:

- Teacher recruitment (\$500 per new staff member for the subsequent school year, Function: 2500, Object: 55400)
- Personnel Costs
 - Function 1000 - Instruction Personnel Services Compensation and Employee Benefits
 - Function 2100 - Support Services Students - Personnel Services Compensation and Employee Benefits
 - Function 2300 - General Administration - Personnel Services Compensation and Employee benefits
 - Function 2400 - School Administration - Personnel Services Compensation and Employee benefits

Our staffing plan as outlined allows SMCS to maintain a 1:14 teacher to student ratio during all five years of the first term of our charter, as well as hire necessary student support staff in order to provide our students with a quality public Waldorf education aligned with our mission. SMCS will adjust our growth and staffing structure based on fluctuations in funding with approval of the School Board. The SMCS School Board will approve our staffing structure and budget annually.

Unforeseen Budget Challenges

The SMCS Founding Team recognized the importance of being prepared for unforeseen budgetary challenges. Under-enrollment is a common risk for new charter schools. In order to mitigate this risk, SMCS has prepared its budget based on meeting 75% of our enrollment capacity for Year 1 of operations, 85% of our enrollment capacity for Year 2 of operations, 95% of our enrollment capacity for Year 3 of operations, and only accounting with 100% enrollment starting in Year 4 of operations. SMCS will endeavor to exceed these percentages in every year of operations. However, this conservative approach to our budget provides SMCS with the tools to manage our risk efficiently. If SMCS fails to meet its enrollment target, we shall double our recruitment efforts in subsequent years while also implementing strategic cost-cutting measures. In such a scenario, SMCS will strive to retain budget items most specifically aligned with our mission to preserve the quality and integrity of the

education we offer. The first set of adjustments will be made to costs associated with instructional materials and/or other line items that are dependent on the number of students. SMCS may consider delaying key staffing hires until enrollment demonstrates the need for these staff members to come onboard. SMCS will also endeavor to partner with a robust Supporting Foundation to supplement its revenues.

D. (4) Professional Development Plan

Provide a **clear, comprehensive, and compelling** plan for Professional Development.

ANNUAL PROFESSIONAL DEVELOPMENT (PD) PLAN

Professional Development Overview

Sun Mountain Community School understands that great education begins with great teachers. The most efficient way to promote transformative change and increased opportunities for students is by increasing teacher effectiveness. Teacher effectiveness has consistently been identified as the most important school-based factor that influences student academic growth and proficiency (Harvard University Center for Education Policy Research, 2016).

The staff member and community that can deliver this experience to our students, must understand both public school expectations and the Waldorf pedagogy. While there will be places for specialists in our charter school, the goal is for all staff and faculty to cultivate a continual, growing understanding and expertise of both fields. This way, each faculty and staff member will facilitate bringing common core curriculum through the Waldorf method in their own part of the school. The Founding Team commits to acquiring and training certified Waldorf and NMPED accredited teachers as we see trained teachers as the foundation of a healthy Waldorf school. This will require training requirements that exceed state requirements, in accordance with requirements of NMAC 6.65.2.8 and the evaluation and funding requirements of NMAC 6.65.2.9, and NMAC 6.65.2.10. It will also support the fulfillment of our mission, the delivery of our proposed model, and the achievement of various performance goals.

With this in mind, SMCS teachers will participate in 25 days or three weeks of PD outside the school year and two weeks of PD built in throughout the school year. Across these cumulative five weeks, all sessions are connected to at least one of the following four categories:

- 1. Proficiency in Waldorf teacher training methods.**
- 2. NMPED core curriculum and best practices.**
- 3. Culturally and linguistically inclusive education.**
- 4. Special education identification and best practices.**

Some of the five weeks of professional development will be selected for faculty, for example, during much of in-service training and Friday PD days. In these cases, great effort will be made to rotate through each of the four areas of value. Other training will be at the discretion of the teacher. Once a teacher has been accredited with a NMPED teacher's license and with a Waldorf teaching certificate, teachers will be able to choose how they deepen their professional development. Teachers will be guided to choose to diversify their training with professional development focuses from two of the four valued categories each year.

Teacher to Teacher Training

Time will be given in In-service training to share highlights of summer PD with the group of teachers. This will allow teachers to share their growing knowledge in that moment, but to also give colleagues a point of contact for future concerns or issues in different teachers' fields of study.

Proficiency in Waldorf teacher training methods. Teachers will be required to complete a **Waldorf teacher's certificate** within 5 years of their start date with SMCS. The faculty must begin their certification training before the beginning of their second year of employment. Certified Waldorf teacher trainings provide a teacher with the full picture of the Waldorf curriculum, the foundational understanding of the developing consciousness, and a personal experience and training in the many subjects a teacher of an integrated curriculum needs to teach (the academics as well as recorder, singing, speech, painting, and drawing). These tools allow a Waldorf teacher to have insight into the developing human being, as well as the right tools for that undertaking. A certified Waldorf teacher is equipped with approaches for clearing away the students' hindrances to learning, open the pathway for student success.

If the teacher cannot begin their certification training in the first year of employment, they will be required to take a "**Summer Renewal Course**". This term refers to intensive summer Waldorf training for a particular grade of instruction. As Waldorf teachers move with their students year to year, these renewal courses are very common to refresh for the teacher the coming year's content and standards and are taught in many schools across the country as well as on-line. These courses will also be offered for any lead teacher about to teach a grade that they had not taught before.

Furthermore, there are additional **topic specific trainings** through the Association of the Waldorf Schools of North America (AWSNA) certified training institutions that address other subjects from the four PD valued categories. For example, some of the courses offered by AWSNA in the summer of 2024, which the Sun Mountain Community School would include as one of our value categories, are "Decolonizing curriculum", "Uncovering and dismantling racism", "Emergency Pedagogy Course for Traumatized Children and Adolescence", "Teaching for Black Lives in Waldorf Schools", "Developing Literacy in Early Education", "An Introduction to the Extra Lesson (Waldorf approach to assisting special education learners in the classroom)".

NMPED core curriculum and best practices. At Sun Mountain Community School, we recognize that our work is to bring NM Common Core State Standards through the Waldorf method and so PD in both of these fields is essential to the success of our mission. Our new faculty hires first priority will be to obtain a NMPED licensure. Once this has been accomplished, SMCS will encourage teachers to continually expand their understanding of changes in core curriculum standards, best practices in administering and analyzing tests, as well as all other best practices taught by the NMPED. SMCS teachers and staff will attend any training that is required by the NMPED. As a community school, we are highly interested in training that include teachers from other LEAs, in order to share new ideas and educational best practices. Some possible acceptable trainings would include:

- NM STEM Symposium,
- CANVAS Courses (selected according to needs of the district, the school, and the class. Some of the suggestions for all teachers will be Assessments)
- LETRS (Language Essentials for Teachers of Reading and Spelling) K-5 required
- iMSSA trainings

Culturally and linguistically inclusive education. Trainings for culturally and linguistically inclusive education would include but are not limited to:

- Indian Pueblo Cultural Center - <https://indianpueblo.org/indigenous-wisdom-curriculum-professional-development-sessions/>
- Native Knowledge 360 (Smithsonian) - <https://americanindian.si.edu/nk360/>
- NM VISTAS training in diversity, equity, and inclusion.
- Cultures of Thinking in Action monthly meeting with area schools.
- Section 9, Anti-Racism and Racial Sensitivity Training and Professional Development.
- We will require attendance at one of three optional meetings:
 - Regional Gatherings Locations and Dates
 - Wednesday, May 1, 2024 - Taos, NM
 - Tuesday, May 7, 2024 - Albuquerque, NM
 - Thursday, May 30, 2024 - Ruidoso, NM
- SIOP (Sheltered Instruction Observation Protocol) Trainings
- TESOL (Teaching English to Speakers of Other Languages)

Special Education identification and best practices.

- New Mexico Special Education conferences offered through NMPED and Office for Special Education
- The Director's Academy

Administrative Trainings

Administration will be required to attend all required NMPED training. In addition, a future to-be-formed Supporting Foundation will also support their continued training as well.

Waldorf Administrative Courses. The development of the human being does not stop at the end of high school. We continue to develop and create more complex relationships with the world in which skills are needed. The administration also needs renewal and ideas to bring the healing Waldorf methodology into the adult relationships of a school. This is why there are summer Renewal courses for administrators to attend these courses as budgets allow.

Alliance for Public Waldorf Education. The Head of School and/or the Pedagogical Director will attend the Alliance for Public Waldorf Education annual conference to learn from other schools that have walked this path already. In 2023, this conference was virtual over the MLK weekend, from January 3rd to the 5th.

As SMCS student and teacher population increases, other Leadership Team members will take on instructional coaching responsibilities that align with their area of instructional expertise. The vision setting process for professional development will be led by the Head of School in the spring of each year with the support of other Leadership Team members based on feedback from staff members.

Whole School Professional Development

Whole school staff and faculty professional development (PD) supports the development of all staff members and will take on several different forms. A weekly Friday PD will occur as part of the school's regular calendar. Summer professional development days are built in the beginning and end of the school year.

The first and most important role that the whole school professional development plays is to support the onboarding, orientation, and team/community build process. During the first three days of Fall PD, the majority of professional development will be whole school focused. These sessions will focus on engaging with our school's mission, vision, values, and guiding principles. We will also collaboratively explore the support systems we will use throughout the year to assure that all teachers feel productive and supported in their work. We explore our individual belief systems and mindsets,

and explore how to work with them to ensure the most productive collegial experience and the most equitable and supportive experience for our students. We will engage in pedagogical study, team building, and review PED statutes and best practices. Finally, we will dedicate a full day for development related to race, equity, and identity. These three days of development introduce topics that will be explored further during weekly professional development times throughout the school year and we will assess how well we achieved our goals in the culminating two days of PD.

Response to data. One of SMCS’S guiding principles is that data, research, and evidence-based practices drive decisions. This guiding principle lives within a specific segment of our professional development structures and helps us ensure that our teaching is responsive to student performance and needs. In that light, during regular weekly Friday professional developments, staff members engage in guided data analysis, which can include reflecting on summarized data that is provided to them or sifting through raw data to make sense of performance trends related to academic and cultural targets. The second phase of this professional development structure consists of staff members engaging in some form of planning and/or practice that reflects a deliberate adjustment to instructional or behavioral support techniques connected to the data analysis.

These data analysis days will focus on a timely response to data that includes any fall, winter, or spring universal screening/benchmarking assessments used to inform our Multi-Layered Systems of Support (MLSS) for academic, social, emotional or behavior purposes. Main lesson and specialty teachers, interventionist and the school counselor will assess the need for interventions or placement changes of layers two and three of MLSS depending on students’ progress and challenges.

Timeline

We will require the Head of School attends three (3) Equity Council meetings a year. These are free. The Head of school will collaborate with the Equity Council to refine and develop continuing professional development for teachers around diversity, equity and inclusion.

Figure 43 - Yearly schedule of meetings between Head of School and Equity Council

September	October	November	December	January	February	March	April	May
Orientation and launches (Regional sessions)	Orientation and launches (Regional sessions)	CLR (Culturally and Ling Inventory and Framework (Virtual))	Advisements and strategic equity plans (Virtual)	NMPED Equity Team share out (Virtual)	Advisements and budget (Virtual)	Site visits (In-person)	Statewide highlights with NMPED Equity Team (Virtual)	Celebrate the year and plan for the summer (Regional sessions)

As stated in our calendars, an equivalent of two-weeks of professional development will happen during the school year during Friday professional development days. During implementation year, the Head of School will make a rough calendar of events to address throughout the school year. This calendar will only be a guide as the Head of School and the pedagogical director will choose issues alive in the school and the community to speak to through professional development when needed. The Head of School, the pedagogical director and the director of operations will remind teachers in January of their PD obligations, the required licensure and four values for PD options, and the amount they are able to spend toward any given course work. Teachers will be required to submit their summer training by February for approval.

Responsible Parties

The Head of School, the operational director, and the pedagogical director will assess available funds in January. They will then see that all teachers are enrolling in the appropriate and sufficient training

each year. They will then inform teachers that training enrollments have opened in February, guiding individual teachers through the required licensure and four values for PD options. Classes and coursework will be secured by the second week in March.

Associated Costs

The yearly budget includes a line item equivalent to \$500 per teacher per summer to dedicate to teachers' summer training. Any secured Title II and Title III funding may also be delineated to further teacher's PD. SMCS hopes the proposed Supporting Foundation fundraising effort will cover an additional portion of the cost of the average teacher's training program. Common summer courses and topic specific training run from \$300-\$680. A teachers' training certificate is, on average, about \$17,000 over 3-4 years, depending on the program. A teacher can contribute that money to cover her training cost and then will be required to pay any costs over \$500.

MENTORSHIP PLAN

Novice Teacher Mentoring

Sun Mountain Community School will provide a formalized mentorship for novice teachers that is structured in accordance with NMAC 6.60.10.8. Our novice teacher mentorship will focus on developing level one teacher competencies identified in the NMAC 6.69.4.12.(B). SMCS leaders will ensure that teachers receive a high level of support in their first and second year of teaching, whether that be as a first year public school teacher, or as a Waldorf teacher. Even seasoned Waldorf school teachers who have been in the public sector will receive one year of teacher mentorship. While we are starting, we may not have the number of Level 2 and Level 3 teachers needed to cover the needs to mentor novice teachers. In this case or by design, the Pedagogical Chair will act as the mentor for the novice teachers. This means, of course, that the Pedagogical Director would need to meet qualifications as laid out in 6.69.8 NMAC.

Teachers who feel supported and a part of quality professional relationships stay in the profession longer. Our novice teacher mentorship program will provide individualized support for teachers who are new or newer to the profession from more experienced teachers or the Pedagogical Director, who have demonstrated proficiency in various teaching competencies as evidenced through Elevate NM Teacher Evaluation System. Support provided to novice teachers will include, but is not limited to the following:

- instructional material development
- culturally and linguistically responsive teaching practices for all diverse learners
- structuring conferences with parents and families
- understanding, developing and responding to formative and summative assessments
- structuring individualized conferences with students
- additional observation and feedback from a mentor teacher
- collaboratively lesson planning/internalization

All mentors will receive a \$750 stipend annually for their work. (See Appendix G Five Year Budget, Function 1000, 51300). Mentors will be supported and monitored by the Pedagogical Director and SMCS's Head of School.

Evaluation Policies and Process

The pedagogical director directs the faculty evaluation process, and, with the support of the Teacher Council, administers faculty mentoring. Their findings are reviewed by the Head of School. The pedagogical director may bring common concerns and trends to the Teacher Council following the faculty evaluation process without naming or revealing concerns of any one teacher directly or covertly. The Teacher Council's work is to adapt and adjust curriculum, to suggest certain training or professional development topics that would aid the faculty as a whole to improve performance.

The Pedagogical Director reviews faculty evaluation protocol and procedures. Faculty evaluation methodologies may include, but are not limited to:

- self-evaluation through individual annual professional improvement plans,
- school-appointed mentor reports,
- classroom observations by the pedagogical director,
- community surveys and
- Faculty performance evaluations by the pedagogical director.

Staff members engage in a regular performance review process that includes a component of self-evaluation. Staff performance evaluations are administered by the staff member's direct supervisor and reviewed by the Head of School. Performance evaluations are kept on file in each employee's personnel file in the Business Office.

Figure 44 - Mentoring and evaluations' timeline

Time	Procedure	Responsible Party
August	New teachers are assigned a mentor	The pedagogical director with input from the teacher council
September	Initial classroom observations for all teachers	Pedagogical director
October	Reporting due for concerns of any particular classroom teacher. This can be done at any point in the year but the question is specifically asked here.	Pedagogical director reports to the Head of School. If need be, a performance improvement plan is made and shared with the teacher in question and that teacher's mentor if applicable.
November	Faculty performance evaluations due.	Pedagogical director reports to the Head of School who will report to the School Board
January	K-5 Faculty Begins LETRS training	Pedagogical director
January	Faculty self-evaluations due	Pedagogical director implements evaluations to each teacher. Teacher is given 2 weeks to complete
February	Pedagogical director conducts a peer interview based on years of classroom observations and self-evaluations. Teacher and	Pedagogical director, each faculty. Pedagogical director reports back to the Head of School.

	pedagogical director discuss the most beneficial summer training.	
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DISCIPLINARY ACTION & PERFORMANCE IMPROVEMENT PLANS

Disciplinary action and/or a *Performance Improvement Plan* is intended to identify and address unacceptable employee performance or behavior. They are the responsibility of the collective partnership of the pedagogical director and the Head of School. As an at-will employer, the school reserves the right to proceed directly to termination of employment in its sole discretion. But if the school chooses to undertake disciplinary action or to implement a *Performance Improvement Plan*, the school may utilize some or all of the following, none of which alter the at-will employment status of any employee:

- Issuance of verbal counseling or warning for the first occurrence of a violation of the school’s expectations for performance and behavior, or policies and practices.
- Issuance of written disciplinary reprimand and/or the implementation of a *Performance Improvement Plan*, that outlines performance and behavior expectations and consequences.
- Termination of employment.

Any one of the following actions on the part of an employee shall constitute performance or behavior resulting in disciplinary action and/or a *Performance Improvement Plan*, or termination of employment.

- Violation of the drug and alcohol-free workplace, or workplace violence, or harassment and discrimination, or conflict of interest policies.
- Refusing or failing to perform the duties assigned, or inability to cooperate with or get along with others.
- Excessive absences or tardiness.
- Misuse or abuse of office technology including computers and telephone.
- Theft or misappropriation or misuse of school property.
- Failure to comply with school policies and procedures.

These examples are not intended to state every reason for disciplinary action or a *Performance Improvement Plan*, or termination.

References for this section:
 Harvard University Center for Education Policy Research, 2016. *Teacher Effectiveness*, <https://cepr.harvard.edu/teacher-effectiveness>.

E. Employees

E. Employee Relationships and Classes of Employees
 Clearly describe the employer/employee relationship and provide **clear terms** and conditions of employment for all classes of employees (administration, professional staff, and administrative staff).

The Sun Mountain Community School (SMCS) is a community of families and educators dedicated to cultivating the intellectual, social, emotional, physical and consciousness capacities of the developing human being. Our mission is to educate the whole child, using an age-appropriate approach to content and skills based on principles of Waldorf Education and the work of Rudolf Steiner. Our students engage in rigorous academics, develop connections to the natural world and moral discernment, and achieve an appreciation of themselves and others.

To deliver on the promises of our mission, Sun Mountain Community School's leaders will build a staff that shares a passion for this commitment to our community, and in many cases, is trained in Waldorf pedagogical principles. SMCS's employees, along with our students and families, will be the heart and soul of our organization. Our school will strive to be a place where the following objectives are met for all employees:

- All employees experience a sense of belonging and purpose
- All employees are compensated well and satisfied with their work
- Employees feel genuinely invited to openly bring up concerns with appropriate leadership
- Employees feel the school is living up to its vision and mission
- Leadership and Staff deliberately make an effort to value each employee's unique identity and perspectives

SMCS's Founding Team has developed employment terms to ensure that we fulfill our mission by maximizing student achievement, sustain the growth of our organization, support the objectives listed above, and contribute to the sustainable fiscal health of our organization. At the beginning of our implementation year, SMCS's School Board will approve a personnel handbook (see Attachment 25 for a draft of our personnel handbook), which will include information related to hiring, employment classification, work schedules and calendars, leave guidelines, vacation days, personal days, sick days, payroll, salary schedules, benefits overview, workplace safety, discipline and grievance processes, and staff evaluation policies. All personnel policies and terms of employment will comply with New Mexico public and charter statutes, and the Administrative Code. By referencing the former Santa Fe Waldorf School Employee Handbook and institutional knowledge of the former school, the School Board is able to audit 40 years of experience, take what has worked well and leave what has not worked, and use the public school standards and statutes to improve practices. This is an exciting endeavor that the founders feel passionate about!

Employment Classification

All employees at Sun Mountain Community School will be classified as part-time or full-time, certified or non-certified, and exempt or non-exempt. Other individuals, including contracted and temporary employees or consultants may also be employed by Sun Mountain, as needed.

- **Full-Time Employees:** Employees that work the entirety of the school year, at least 32 hours per week. All Full-Time Employees qualify for the Sun Mountain Community School full benefits program.
- **Part-Time Employees:** Employees that work less than 32 hours per week. Part-Time Employees do not qualify for the SMCS's full benefits program, but some may qualify for retirement benefits as set forth more fully in the 'Retirement' subsection below.
- **Certified Employees:** These employees must hold the requisite educator's license in the specific grade level and/or content area, as defined by the New Mexico Public Education Department Professional Licensure Bureau.
- **Non-Certified Employees:** These employees are those who do not need to hold a license to complete the requirements of their job.

- **Exempt Employees:** These employees do not qualify for overtime pay, per the Fair Labor Standards Act (FLSA). FLSA will be used to determine whether an employee is exempt or non-exempt.
- **Non-Exempt Employees:** These employees qualify for overtime pay, per the Fair Labor Standards Act (FLSA). FLSA will be used to determine whether an employee is exempt or non-exempt.
- **Consultant or Contract Employees:** Independent contractors who work under the terms of an agreement made between them and Sun Mountain Community School. Consultants are not considered employees and do not qualify for the Sun Mountain Community School program.
- **Temporary Employees:** These employees work at Sun Mountain Community School for a short period of time, typically not spanning more than two trimesters in an academic year. Temporary Employees do not qualify for the full Sun Mountain Community School benefits program, , but some may qualify for retirement benefits as set forth more fully in the 'Retirement' subsection below.

Benefits and Pay Terms

Pay Schedule: SMCS's employees will be paid semi-monthly, meaning checks will be distributed twice per month. Payday will fall on the 16th and final day of each month, for a total of 24 pay periods throughout the year.

Salary Schedule: SMCS has developed a salary schedule in accordance with the School Personnel Act (NM Stat § 22-10A-4 (2021)) and using the Santa Fe Public Schools schedules as benchmarks. Our proposed salary schedule for licensed teachers, office staff and educational assistants can be viewed in our budget and in salary schedules.

See Attachment 24 - Salary Schedules.

Salary Schedules for the Head of School, Operations Director, Pedagogical Director, and Special Education Director are outlined below.

Salary Schedule (for full time role):

- Head of School: Y1: \$88,000; Y2: \$90,000; Y3 and subsequent years: \$102,000
- Pedagogical Director: \$80,000
- Special Ed Director: \$80,000
- Operations Director: \$90,000 (position comes on board in Year 3, until then the role is handled by a contractor Operations Coordinator)
- Office Administrator: SMCS will use the Community School Coordinators Salary Schedule for the Office Administrator, also included in Attachment 24.

Benefits: All Full-Time Employees are eligible for the SMCS full benefits program. SMCS's full benefits program includes health and life insurance, disability coverage, unemployment compensation, and worker's compensation. The New Mexico Public Schools Insurance Authority (NMPSIA) will provide all health insurance plans for Sun Mountain's full time employees. In addition to the full benefits program, all employees who work at least 20 hours per week are entitled to participate in the New Mexico Educational Retirement Board (NMERB) retirement plan, where the charter school must match employee contributions for retirement benefits. Our proposed five-year budget assumes that SMCS will pay 18.15% toward educational retirement, 2% toward ERA, 1.45% toward Medicare, 6.20% toward Social Security, Workers Compensation, Unemployment and the NMPSIA determined percentages of medical, dental, vision, and life insurance. SMCS will regularly review our benefits

package to ensure we remain a sought after option for educators in our community. (See Appendix G: Five Year Budget).

Work Schedules: The required work hours for all staff members, unless otherwise designated in their contract, is 7:45am - 4:00pm. All staff members will have rotational duties to support arrival for dropoff, breakfast and dismissal. As indicated by the salary schedule posted above, staff members will work the following number of days:

- 182 Work Days: Educational Assistants (beginning in Year 3)
- 205 Work Days: Teachers, Interventionists
- 220 Work Days: Office Administrator, Special Education Director, Pedagogical Director
- 12 Month: Head of School, Operations Director (beginning in Year 3)

The following positions will be contracted workers: School Counselor, Educational Assistants (Years 1 and 2), Operations Coordinator (Years 1 and 2)

Leave: The Sun Mountain Community School Founding Team will hold high expectations for staff attendance. However, we recognize that there will be times throughout the year when employees must miss work.

Sick Days: In alignment with the current Elevate NM educator evaluation, each full-time staff member will be entitled to 64 paid sick hours per school year.

Personal Days: Each full-time staff member will be entitled to two paid personal days per school year. Written notice requesting a personal day must be given to the Head of School for approval at least one week prior.

Family Medical Leave Act (FMLA): Full-time employees who have completed at least 90 days of continuous employment at SMCS will be entitled to an unpaid leave of absence for family care, maternity, or FMLA adoption guidelines. An employee may apply for a family care leave of absence to care for certain members of one's immediate family, which includes parents, children, spouse, domestic partner, siblings, and grandparents due to a serious health condition. FMLA may also be used to care for a newborn or newly adopted child as maternity leave, paternity leave, and adoption leave for up to twelve weeks.

Bereavement: Full-time employees at SMCS are entitled to take up to three (3) consecutive days off, with pay, to attend the death of an immediate family member. Additional time without pay or unused personal leave days can also be used for additional bereavement leave. For these purposes, family is defined per FMLA guidance and includes a spouse, domestic partner, child, parent, sibling, grandparent, or grandchild.

Military Leave: SMCS staff members who are members of the military are eligible for up to five years of cumulative leave through the Unified Services Employment and Re-employment Act (USERRA) These employees must be honorably discharged at the conclusion of their service. This leave is permitted whether the service is voluntary or involuntary.

Jury Duty: All SMCS employees who are summoned for jury duty will be granted leave. In this event, employees should inform the Head of School immediately so that alternative accommodations can be made. Employees will be paid regular wages for the first ten work days of actual time served on jury

duty. Jury duty extending beyond that time will be unpaid. Employees are expected to return to work on any day or part of a day when released early.

Major Conditions of Employment

All SMCS employees will be required to complete fingerprinting, background checks, meet licensing requirements for position(s) held, and will also be required to sign employment contracts. The following New Mexico Administrative Codes have been used to develop these conditions:

- NMSA 22-10A-5 “Background checks; known convictions; reporting required; limited immunity; penalty for failure to report”
- NMSA 22-10A-21 “Licensed school employees; employment contracts; duration”
- NMAC 6.66.2.8 “Licensed School Instructor Contract”
- NMSA 28-2-3 “Employment eligibility determination”
- NMSA 28-2-4 “Power to refuse, renew, suspend or revoke public employment or license”

Grievance Policy

Sun Mountain Community School’s employee official grievance policy and procedure will be represented in both the Personnel Handbook and the School Board Policies. Sun Mountain Community School will treat all employees in a fair and impartial manner. We value each of our team members and the skills, talents, and commitment to public Waldorf education and our mission. We will work to create a professional environment where problems or concerns are intentionally discussed to ensure our work environment is positive and productive.

A grievance is defined as a significant concern that arises regarding a violation of personnel policies or practices. This definition extends to concerns between co-workers, or concerns between an employer or supervisor and an employee. Employees who seek support to address concerns may request mediation support from a supervisor. Employees availing themselves of the mediation process shall not be subjected to discrimination, exclusion or retaliation or be penalized for exercising this proactive method of resolution. SMCS staff members will also be encouraged to go directly to a person of concern to reach a resolution independently. If supervisory mediation is needed, the outcome will be considered final and the process will be confidential. If a conflict or concern arises, SMCS will take the following steps with the goal of reaching an amicable resolution.

1. If an employee feels they have been treated unfairly, the employee should reach out to their direct supervisor to discuss the concern.
2. If the discussion does not render the desired results, the employee should present the concern in written form to the Head of School within two business days of receiving their supervisor’s response. The employee must notify their supervisor of this report.
3. The Head of School will respond to both individuals within two business days of receiving the complaint, in person and in writing.
4. If the Head of School cannot resolve the complaint, or if the complaint involves the Head of School, the employee may present the complaint to SMCS’s School Board.
5. The School Board will review any complaint brought before it and will respond in writing to the parties concerned within fifteen days of initially receiving the complaint. The decisions of the School Board are considered final.
6. Retaliation of any kind against an employee for bringing up complaints under this procedure is unacceptable.
7. At their own expense, employees may seek outside support in order to articulate a complaint as effectively as possible.

Employee Discipline, Re-Contracting, and Discharge

Employment contracts at SMCS will be based on and signed prior to the beginning of each fiscal year. In accordance with NMSA 22-10A-23, employees will be informed of their termination or reemployment prior to the final day of the contracted school year. Any employee who is offered reemployment must accept the offer within 15 days of when the offer is extended or within 15 days of the final day of the school year. Further detailed in Section II. D. (3) of this application, SMCS Community School's staff recruitment timelines ensure we meet the reemployment and offer acceptance requirements.

The Sun Mountain Community School's School Board and Head of School will follow all applicable law related to termination of an employee, which includes giving notice on or before the last day of the school year or current employment contract. Non-renewal of a contract is considered "termination." Sun Mountain Community School employees who have been employed for less than three years, can be terminated for any reason. The employee must be provided with a written reason within 10 days of request. For individuals who have been employed by Sun Mountain Community School for more than three consecutive years, just cause reasoning must be provided with the termination. Just cause means a reason that is rationally related to the employee's competence, turpitude or the proper performance of the employee's duties and that it is not in violation of the employee's civil or constitutional rights. The employee may dispute the just cause termination with the SMCS'S School Board. Both parties must follow the outlined timeline in NMSA 22-10A-24 and 22-10A-25.

If necessary, SMCS may also discharge an employee, which is defined as ending the employment relationship with a certified employee prior to the expiration of the current employment contract. In this case, just cause and reasoning must also be provided, including insufficient performance or dereliction of assigned duties. The discharged employee may request a hearing with SMCS's School Board, which is required to occur 20-40 days after the request, with at least 10 days given notice. Following the hearing, the School Board must provide a final decision within 20 days.

Employee Unions

Sun Mountain Community School does not anticipate having an employee bargaining agreement in year one, nor does it anticipate having a bargaining unit after year one. However, in the event that one is certified, the School Board will negotiate a collective bargaining agreement as provided in the Public Employees Labor Relations Act. Sun Mountain Community School and the Sun Mountain Community School School Board will comply with all applicable statutes, including:

- NMSA 10-7E-5 "Rights of Public Employees"
 - NMSA 10-7E-6 "Rights of Public Employers"
 - NMSA 10-7E-7 "Appropriate Governing Body; Public Employer"
 - NMSA 10-7E-19 "Public Employers; Prohibited Practices"
 - NMSA 10-7E-10 "Local board; created"
 - NMSA 10-7E-11 "Local board; powers and duties"
 - NMSA 10-7E-12 "Hearing procedures"
 - NMSA 10-7E-13 "Appropriate bargaining units"
 - NMSA 10-7E-14 "Elections"
 - NMSA 10-7E-15 "Exclusive representation"
 - NMSA 10-7E-17 "Scope of bargaining"
- The Sun Mountain Community School (SMCS) is a community of families and educators dedicated to cultivating the intellectual, social, emotional, physical and consciousness capacities of the developing human being. Our mission is to educate the whole child, using an age-appropriate approach to content and skills based on principles of Waldorf Education and the work of Rudolf Steiner. Our students engage in

rigorous academics, develop connections to the natural world and moral discernment, and achieve an appreciation of themselves and others.

- NMSA 10-7E-19 “Public Employers; Prohibited Practices”
- NMSA 10-7E-20 “Public employees; labor organizations;

We will rely on the draft example in our Personnel Handbook. **See Attachment 25 - Personnel Handbook.**

F. Community/Parent/Employee Involvement in Governance

F. (1) Community Involvement in School Governance and Operation

Provide a **clear, comprehensive, and cohesive** plan that describes school structures that will provide meaningful parental, professional educator, and community involvement in the governance and operation of the proposed school.

COMMUNITY AND PARENT INVOLVEMENT IN SCHOOL GOVERNANCE

SMCS will provide equitable, accessible opportunities for the community and the parent body to be involved in school governance and concomitantly in its successful operation. Waldorf Core Principle #6 states that, “School leadership is conducted through shared responsibilities within established legal structures.”

“State of the School” Annual Meeting

At the start of each school year, the school will host a forum at which the school leadership will provide a review of the past year and a look ahead to the current year. Important topics will include: academic successes; challenges and opportunities; the financial position of the school; the plans for growth and development of existing/future resources toward improving the “whole-child” educational experience for SMCS students. While this event will create the opportunity for constructive dialogue between SMCS and its constituencies, it will be in the spirit of everyone adding their abilities to furthering the excellence of the school for all its participants. There will be a clear path for attendees to offer their written questions/suggestions for school administration to read and respond to as well as opportunities to volunteer for the any number of roles including interest in joining the Board, Advisory Council or Equity Council; joining the Parents’ Association; as well as many as yet undefined opportunities to share expertise and resources for the benefit of the school.

SMCS Parent Association (PA)

The Parent Association will form as soon as possible after the initial enrollment lottery is complete in February 2025. All parents of enrolling students will be invited to join and begin work on structuring the association, and, with SMCS administrative collaboration, defining what service and support the PA can provide once school begins. It is essential that equity and access be front of mind in the formation and operation of the PA, with meetings that are scheduled as hybrid meetings (both in person and online) and not during the day, so as to allow for all parents to attend. In addition, it is essential to provide opportunities for involvement that don’t require financial commitments or school-day only service. SMCS’s community festival life often occurs on a weekend day, and thus this will provide a consistent way for working parents to volunteer their talents.

New Student/Parent Orientation

This event will provide an open-handed welcome and invitation to new families. While it will cover the logistics of being a SMCS student and parent as its primary goal, it will also offer opportunities for new parents/guardians/caregivers to gain a firm grasp of how they can be involved in the school community and how their voices can be heard and responded to when they have issues, questions, or ideas to offer. A series of brief information sessions will cover SMCS's unique pedagogical approach as well as the governance structure of the school and encourage new families to involve themselves in parent education and the various governance and advisory structures. Importantly, current students and parents/guardians/caregivers will staff this event, ensuring connection and community building occur from the very start of the new student/family journey.

Inclusive and Welcoming

While continually working to create opportunities for all types of parents to become involved at the school, SMCS will also explicitly instruct teachers, staff, and administrators that parents and families are not required to attend school events or participate in offerings. A parent's lack of involvement will never be held against a student or family; who of us can know what another is facing? SMCS's approach is for our community support to reach and lift up every student, at a minimum, and their families and extended families when possible.

School Board Meetings

All community members are encouraged to attend the monthly School Board meetings, which are a direct opportunity to learn about the governance structure and to have timely information on the business and issues before the Board. All School Board meetings will comply with the New Mexico Open Meetings Act. These meetings will also be scheduled with equitable access as paramount.

Equity Council

SMCS will establish an Equity Council with the purpose of advising the school on actions, solutions, and implementation of a culturally and linguistically responsive school framework that holds students' identity, culture, and language central to every design aspect of SMCS and in the work that we do as an LEA every day. If there is already a current charter school consortium established in Santa Fe, SMCS will join the consortium to better leverage resources, share best practices, and meet the needs of students. If a consortium is joined, SMCS will finalize its membership through Memoranda of Understanding. SMCS has used the guidance and framework outlined in these two documents to outline our Equity Council plan:

1. https://webnew.ped.state.nm.us/wp-content/uploads/2021/02/NMPED_EquityCouncils_Memo_11.22.19.pdf
2. https://webnew.ped.state.nm.us/wp-content/uploads/2020/06/CLR_SbD-Tool-2020.pdf

Standards for Equity Council recruitment and appointment:

- The process for recruiting and appointing council members will be fair and transparent, posted on SMCS's website, and aimed at creating a diverse group of passionate people.
- Membership will directly reflect the school population by ethnicity, SMCS will aim to have each ethnicity represented in proportion to the school population. At this time, we will use the current enrollment data from Santa Fe Public School District to estimate our percentages of total enrollment at .8% Black or African American, 80% Hispanic, 2% Asian/Native Hawaiian/ Pacific Islander, 16% White.

- Duration of meetings and number of meetings will be determined by the Equity Council and will be based upon the the need to meet Equity Council and CLR/SbD requirements

Equity Council work includes:

- Completion of the required Martinez/Yazzie Readiness Assessment and CLR/ SbD Inventory
- Creation of the School Equity Plan to support school alignment with the NMPED culturally and linguistically responsive goals for improving outcomes for at-risk students, Native American students, Students with Special Needs, students who are English learners, and economically disadvantaged students; this plan will be uploaded to NM DASH dashboard, a tool of NMPED aimed at providing parents, community and stakeholders with meaningful information on school improvement plans.
- Creation and implementation of a culturally and linguistically responsive (CLR) framework that improves academic outcomes for at-risk students, Native American students, Students with Special Needs, students who are English learners, and economically disadvantaged students.
- Creating a report to describe SMCS system for, and tracking of, funding and uses of funding to improve outcomes for at-risk students, Native American students, Students with Special Needs, students who are English learners, and economically disadvantaged students.
- Reporting out all findings and completion of required tasks to the school Leadership Team and School Board; monitor SMCS's progress and implementation of recommendations from the Equity Council.
- Empower teachers to implement CLR practices using the framework.
- Follow the advice and meeting schedules set forth by the NMPED Culturally and Linguistically Responsive Schooling by Design Tool (CLR/SbD).

Teachers' Council

The focus of the Teachers' Council is curriculum policy as it relates to pedagogy. Working with a model of shared discernment and consensus, the Teacher's Council makes pedagogical decisions out of its shared study of the growing child. The Teacher's Council is made up of the kindergarten teacher, one member of the elementary school faculty, one middle school faculty member, one subject teacher, and one member of the special education department. The Pedagogical Director is the chair of the Teachers' Council. Through these representatives, teachers are given a voice to direct the pedagogy of the school as they see it best relates to the current needs of the students.

The Teachers' Council's first and foremost responsibility is the unseen wellbeing of the school, expressed through an oversight of curriculum development, pedagogical policy, equitable approachability of the pedagogy, input on faculty qualifications, and suggesting professional development needs. The Teacher's Council will consult with the School Board for input on decisions that impact the budget, such as adding, eliminating, or changing programs. Representatives of the teacher's council will be able to observe applying teachers while they demonstrate their teaching skills, and give their input to the HOS.

Teacher's Council meetings are the philosophical center for the school, and they allow teachers to study the important questions that arise in the interest of the evolving needs of the children and families in our school, such as pedagogy, programs, teaching, child development, educational leadership, parent education, and best practices.

The Teachers Council follows the consensus model of decision making. It makes decisions collaboratively, seeking to find unity among members. This model requires initiative of the members,

as well as the courage to trust the wisdom of the group. The Teachers Council makes broad pedagogical recommendations to the Head of School:

- Ensuring the school holds the best interests of the students as paramount and models values and mission-based decision making.
- Providing counsel on changes in pedagogy or major programming changes
- Analysis of school effectiveness
- Recommendations on the budget in the pedagogical area

Advisory Council

The SMCS Advisory Council (AC) will consist of employees, parents, and community members, and will be chaired by the Head of School. The Advisory Council will meet the statutory requirements per NMSA 22-5-16, and work to support teachers and school leaders in ensuring decisions are aligned with the school's mission and charter contract. In addition, the Advisory Council will provide a mechanism to assure parents and community members have an avenue to impact the education provided by SMCS to its students. The Advisory Council will meet monthly, provide updates when requested and at regularly scheduled intervals, endeavor to continually review the experience of SMCS students and hold the School Board and other leaders responsible for improvement and successes. In addition, the Advisory Council will lead the charge in collecting community input as well as working with the Head of School to advise her or him on state law, regulations and school policies related to pedagogy and curriculum. Lastly, the AC will work to develop relationships with community groups to partner with and benefit the school's mission.

F. (2) Community Concerns and Complaints Process

Provide a **clear, comprehensive, and cohesive** plan to receive and process concerns and complaints from the community and parents.

CONCERNS AND COMPLAINTS PROCESS

Informed

It is the intention of the Founding Team that students and their parents/guardians be informed of the regulations regarding disciplinary and appeal procedures affecting students within the school through the parent handbook and parent-teacher conferences. Teachers will be coached by the Pedagogical Director to cultivate a warm and trusting avenue to welcome and handle parental/guardian concerns in a way that fosters connection and compassion. The Advisory Council will also be a place where community members are reminded of the proper procedures to express grievances and may become a place to study principles of nonviolent communication.

It will be a standard policy outlined in the Parent Handbook that parents or others who show up at school without an appointment will not be able to share their concerns at that moment.

Initiation

Parents/guardians, and students shall attempt resolution of problems affecting students and the education process by informal means by reaching out directly to the specific staff member and expressing their concerns. Most grievances should be able to be resolved at this level.

Formal Complaint

If the grievance is not resolved by reaching out to the staff member directly, then the community member may wish to file a formal complaint. Formal complaints regarding discrimination or harassment based on race, ethnicity, national origin, sex, sexual orientation, mental or physical disability, health, or age at SMCS by a staff member should file a written complaint to the Operations Director. Complaints against faculty members, or curriculum/grades/discipline will be given to the pedagogical director. If the operations director or the pedagogical director is the person who the complaint is being filed against, the complaint may be filed with the Head of School. The written complaint should include the following elements:

- The name of the person filing the complaint. If the person who files the complaint is doing so for a student, both the person filing the complaint and the student's name should be included.
- Contact information for the person filing the complaint, including address, phone number, and email address.
- The name of the person with whom the grievance is being filed.
- A detailed description of the discrimination and/or harassment.
- The date(s) of the discrimination and/or harassment.
- Names of any witnesses or individuals who may have additional information about the incident.
- Description of how the person filing the complaint wants the issue to be resolved.

Timeline for Formal Complaint

Any complaints filed using this procedure must be filed within 30 days of the original incident.

Review of the Complaint

Upon receiving the formal complaint, the operations director will conduct a formal review of the complaint, investigate the complaint, and attempt to resolve the complaint themselves if the complainant is a member of the administrative staff or policy. If the complainant is a teacher or curriculum/grades/discipline, the operations director will assign the pedagogical director the process of reviewing, investigating, and attempting to resolve the complaint. During this time, information gathering, including interviews and the collection of evidence, will be conducted. This step shall be completed within 10 school days. After a review of the complaint and collected evidence, the operations director or pedagogical director will meet with the complainant to present a resolution to the complainant. This may include actions for correcting a situation, as well as action to prevent the situation from occurring in the future. This meeting will happen within 15 school days of the complaint being submitted. The complainant will be provided with a written summary of the filed complaint and the resolution within 20 days of the original complaint. SMCS anticipates that the timeline outlined above will be followed in most grievances, but acknowledges that some grievances may require additional time to be researched and resolved.

Final Step & Appeal to the School Board

If the complainant is not satisfied with the decision made by the operations director, then the family may appeal to the Sun Mountain School Board. The School Board will review the appeal and provide the family with a written response within 30 days of receiving the grievance appeal.

Transparency and Accessibility of Grievance Process

SMCS will maintain the confidentiality of the person filing the grievance, as well as those who participated as witnesses or providers of information, to the greatest extent possible. Retaliation against a family member or staff member posing a complaint is strictly prohibited and can result in disciplinary action.

McKinney Vento and Special Education Grievance Process

Sun Mountain Community School is dedicated to ensuring that special circumstances, including homelessness or special needs do not result in disputes between the school and our families. The McKinney Vento act requires that schools develop policies that ensure that students experiencing homelessness are able to access enrollment and attendance of schools without barriers. Per the Act, schools shall regularly review and update their policies to support students experiencing homelessness. SMCS intends to avoid McKinney Vento grievances through reflective review of our policies and practices through the lens of youth homelessness. However, if there is a grievance, we will first attempt to resolve the grievance through our standard process outlined above. If the grievance is not resolved by that means, Sun Mountain will follow the protocol outlined in NMAC 6.10.3, as outlined by the NMPED. This process entails completion of the NMPED dispute resolution paperwork and a write-up of the school’s response submitted to the NMPED Homeless Liaison within five days of the school’s formal decision.

SMCS will ensure that we maintain regular, two-way contact with the families of our students with special needs. We believe the regular contact with families of students with special needs will prevent most grievances. In the case of a grievance that cannot be resolved through our standard grievance process, our special education grievance process will be based on the NMPED Parent and Child Rights in Special Education: Procedural Safeguards Notice.15F 116. Families should first follow the school’s standard grievance procedure, or the school and the family may elect to seek out mediation from a trained mediator via the NMPED Special Education Bureau. If the conflict is not resolved with either of these means, the family may seek out local support organizations or advocacy groups, including a Parent Liaison from the NMPED. Finally, families may elect to file a formal complaint or request a due process hearing with the state. This process will follow the deadlines and requirements outlined in NMAC 6.31.2.13.

G. Student Recruitment and Enrollment

G. (1) Outreach and Recruitment Plan

Provide a **clear, comprehensive, and cohesive** outreach and recruitment plan

OUTREACH AND RECRUITMENT PLAN

SMCS will continue to build on our outreach and engagement success post-authorization. We will capitalize on the multiple relationships and supportive conversations we have had with numerous community members and organizations to maximize our enrollment outreach and recruitment efforts throughout Santa Fe County, with a particular focus on the 87505, 87507 and 87508 zip codes. All enrollment and outreach materials will be made available in both English and Spanish. The SMCS Recruitment Team will also include members fluent in both English and Spanish at all our outreach

events. Our outreach materials will spell out what a charter school is, what a Waldorf school is, as well as emphasize to all members of our community that SMCS is an open enrollment, non-selective, public charter school accessible to any child in New Mexico.

Action Steps

The SMCS Recruitment Action Plan consists of the following outreach action items:

Outreach Booths

Post authorization, starting in the fall of 2024, SMCS will continue to host, at a minimum, monthly outreach booths at local community centers, libraries, markets and community events. SMCS Outreach booths at the Southside Library, Genoveva Chavez Community Center and the Santa Fe Farmers Market have been very successful. We will continue hosting booths in these locations as well as expand booths in additional locations. SMCS will target events and locations visited by a large and diverse number of families of school age children. These locations may include the Santa Fe Children's Museum, the Santa Fe Botanical Garden, the Southside Farmers Market, MRC Soccer Fields, etc. Our outreach booths will include examples of student work in the form of main lesson books, watercolor paintings, handwork and woodwork projects, as well as bilingual informational materials and details regarding the SMCS lottery. The student work samples have proved to be extremely popular with families, particularly children, helping to draw them in and engage with SMCS volunteers. SMCS will also collect the contact information of interested families to add to our email list at these booths.

Community Festival Events

Cultural and seasonal Festivals are a unique aspect of Waldorf education. Post authorization, SMCS will host a minimum of two seasonal Festivals in the latter part of 2024. These festivals are a way of bringing the community onto the future campus of SMCS while getting a glimpse into Waldorf festival life. At these events the SMCS Recruitment Team will be available to provide enrollment and outreach materials and answer questions. SMCS will also collect contact information of families who attend the festival events to add to our email list.

Enrollment Event

Shortly after the SMCS lottery opens, SMCS will host a campus outreach event for all interested families. Depending on how the recruitment process is going, this event may align with one of the festival events or be a separate event. SMCS shall provide a peek into a typical Waldorf classroom. If we have staffing commitments at that point, teachers may be available to meet-and-greet potential families and answer questions.

Canvassing

Members of the SMCS recruitment team will go door-to-door in targeted community neighborhoods to share information about the mission and vision of SMCS, Public Waldorf Education, SMCS outreach events and our enrollment lottery. Canvassing will be done in pairs and include Spanish speaking members so that we are able to effectively communicate with interested families.

Email Outreach

SMCS has built a list of over 900 email addresses through our outreach efforts thus far. We will continue to build our contact list and will communicate all of our outreach activities and festival events to all interested families on our list. In addition, SMCS will send out monthly updates on our Implementation Year progress as well as enrollment and outreach, including intent to enroll forms, in order to build knowledge and anticipation of the SMCS lottery.

Community Partnerships

SMCS is committed to strengthening the relationships we have developed with our community partners during the application process in the post-authorization phase. Many of our community partners have helped in our application outreach efforts through word-of-mouth support, flyers and/or disseminating information about our application to their email lists. SMCS will endeavor to expand our enrollment outreach efforts through these and other community partners. We will also reach out to local businesses that support targeted demographic areas.

Website/Social Media

SMCS will use our active social media accounts (Facebook and Instagram) to reach out to families and community members. The SMCS Recruitment Team will post regular weekly Implementation Year updates, including outreach booths, festivals, campus visits, community events, curriculum development, enrollment information and lottery guidance. Social media posts will also be bilingual.

Advertisements

SMCS will use targeted advertising methods, including advertisements and press releases in Santa Fe area newspapers, as well as advertisements near public transportation and high trafficked locations community-wide. We will focus on print advertisements during the active enrollment period (December 1 through March 31). Advertisements will provide information about Public Waldorf Education and lottery guidance.

Timeline

Upon authorization, SMCS shall proceed with our recruitment and enrollment outreach based on the timeline (dates are approximate) set out below.

Figure 45 - Recruitment and enrollment outreach timeline.

Date(s)	Process
Sept 1 - Dec 1 2024	Focused effort on recruitment and enrollment outreach (see enrollment outreach action items)
Dec 1, 2024	Enrollment Lottery opens, recruitment and enrollment outreach continues
Dec 1 - Feb 28	Lottery period. Enrollment lottery remains live and open during this period. Recruitment and enrollment outreach continues throughout this period
Dec 1 - Jan 15	Enrollment Event will be scheduled on a date within this timeframe
Jan 13 - Jan 24 2025	Recruitment results are analyzed. Any need for any corrective action(s) is identified. Corrective action plan is created and communicated to all members of SMCS recruitment team
Jan 25, 2025	Corrective action plan (if needed) is implemented, recruitment and enrollment outreach continues
Feb 10 - Feb 14 2025	Corrective action plan results are reviewed. Decision to extend the lottery period, and to what date to extend the lottery period, is made at this point if needed.

Feb 28, 2025	Lottery closes (if it is decided <u>not</u> to extend the lottery period).
Early March 2025	Lottery results are posted; waitlists are created; parents/guardians are notified of results; parents/guardians are given 7 days to accept or decline their child's seat.

Responsible Parties

The SMCS Founding Team, including our proposed Head of School and proposed School Board, will take responsibility for the outreach and recruitment during the Implementation Year. After our inaugural year, the Leadership Team will take responsibility for the outreach and recruitment efforts, supported by the office administrator. Starting in Year 3 of Operations, when the operations director position is established within the school, outreach, recruitment and enrollment will be the responsibility of the operations director supported by the office administrator. Oversight for student recruitment efforts is the responsibility of the Head Of School.

Associated Costs

Informed by other start-up, high performing charter schools, SMCS has budgeted a lump sum of \$5000 for recruitment costs in the Implementation Year, and \$20 per new student each year for recruitment costs in subsequent years. A majority of the associated cost for Implementation Year recruitment will be for preparation and printing of promotional materials and print advertising. The Implementation Year costs will be budgeted out of the Charter Schools Program (CSP) grant (federal funding grant dedicated to support the creation, expansion and replication of public charter schools).

Plan If Recruitment Projections Are Not Met

If, despite our best outreach efforts, SMCS observes a weak response to our enrollment lottery, SMCS will take a critical look at our outreach plan and take corrective action. There are two anticipated reasons for this situation:

1) Quantitative Reasons: SMCS is not doing enough outreach or SMCS is missing specific targeted demographics in our outreach efforts. The SMCS recruitment team will take a comprehensive look at our outreach plan, identify the specific items that need correcting and follow through with a corrective action plan. This may include identifying additional dates and/or locations for outreach tables, more frequent mailings, additional canvassing, etc.

2) Qualitative Reasons: If despite stepping up our efforts, SMCS does not observe an improvement in enrollment numbers, SMCS will proceed to a qualitative analysis of our outreach plan to identify roadblocks in our communication and/or programming. This will be accomplished through one-on-one conversations with key community members and small group meetings. SMCS will also identify and hire a professional consultant with expertise in surveying community populations to identify roadblocks. Corrective action will promptly be taken once these roadblocks are identified.

Recruitment and enrollment outreach efforts will need to start immediately after authorization in order to have enough time in the schedule to identify and take corrective actions.

Assurance for Equitable Access and a Demographically Representative Student Body

As a state authorized public charter school SMCS will neither charge tuition, nor will it have any admission requirements per NMSA 22-8B-4K, and will welcome all students living in New Mexico. SMCS will not discriminate against students or families based on a person's sex, race, religion, national origin, ancestry, pregnancy, marital or parental status, sexual orientation, or physical, mental, emotional or learning disability, and will comply with all state and federal non-discrimination laws. All of our outreach and recruitment materials as well as the enrollment lottery will be provided in English and Spanish and be available online as well as in hard copy. SMCS will make every effort to include

transient and migrant families, as well as families experiencing homelessness, in compliance with the McKinney-Vento Act. SMCS will do this by seeking out and partnering with community organizations that work specifically with such families.

Annual Evaluation of Enrollment Demographics and Recruitment Plan

After each enrollment period, the SMCS Leadership Team will disaggregate data on students who enrolled or expressed interest in enrolling at SMCS. We will review the demographics of our current whole-school and incoming student populations, ensuring that they are reflective of the student demographics in Santa Fe. If our student demographics are significantly different than that of our larger community, including a significantly lower population of economically disadvantaged students, students with special needs, or English Language Learners, we will use that data to inform our recruitment strategies for the following school year. Specific actions may include reaching out to families of current students who fall into one of the subgroups and identifying elements of our recruitment efforts and school programming that either drew them to SMCS or caused potential roadblocks, to inform future recruitment strategies.

The SMCS Leadership Team will also annually review student disenrollment data to identify any patterns in student disenrollment. Additional feedback may be sought from disenrolling families in the form of an exit interview or form. If particular student subgroups demonstrate disenrollment at a higher rate than our general population, the Leadership Team will examine our classroom specific and whole school practices, to ensure we are adequately supporting our students with the highest needs.

The SMCS Leadership team will review enrollment and disenrollment data with the School Board annually. In addition, the Leadership Team will seek out guidance from the Equity Council and the Advisory Council for more effective enrollment strategies, as well as to identify any limitations our enrollment process may present for families in our target demographic.

G. (2) Lottery Admission Process

Provide a **complete, comprehensive, and cohesive** plan to implement a lottery admission process.

Since SMCS is applying for a state authorization, our school will accept any student living in New Mexico. However, we anticipate that our recruitment efforts will focus on Santa Fe County. The SMCS enrollment lottery process will be designed based on NMSA 22-8B-4.1 and the Lottery Guidance Document posted here:

<https://webnew.ped.state.nm.us/wp-content/uploads/2024/01/Lottery-Guidance.pdf>

Based on these two sources, our understanding is that SMCS may apply the following preferences in our enrollment lottery:

- (1) Students already enrolled in SMCS (not applicable in the first year)
- (2) Children of employees employed by SMCS
- (3) Sibling preference (not applicable in the first year)
- (4) Children of military families. The SMCS Founding Team has been notified of this additional preference during the Charter Application Trainings, however neither the Lottery Guidance on the PED website nor the statute includes this. SMCS will comply with all conditions of this preference in our lottery enrollment and waitlisting process.

LOTTERY PROCESS FOR THE FIRST YEAR

For the first year of operation our lottery enrollment process will be as follows:

- The SMCS lottery will be hosted online and will be open to all residents of New Mexico.
- SMCS will post an invitation to enroll in the lottery on its website with a clear start date. We anticipate the start date to be in early December 2024.
- SMCS will engage in an outreach campaign to notify the Santa Fe community of the commencement of the enrollment lottery approximately 60 days before the actual commencement date. Please refer to G.(I) for our Recruitment and Enrollment Outreach Plan.
- On the commencement date, the enrollment lottery would go live. It will run for a minimum of 60 days (lottery period).
- At the end of the lottery period, names will be picked at random for each grade based on the number of spots being offered that year.
- Parents will be notified if their child has been picked for a spot. Parents will have 7 days to accept the spot and complete their registration
- If the number of entries for each grade are equal to or fewer than the spots being offered for that grade, all children who are entered into the lottery for that grade will be offered a spot.
- If the number of entries for each grade are more than the spots being offered for that grade, children who have not been picked for a spot will be placed on a waitlist (also randomly generated).
- If a parent whose child is offered a spot, declines their child's spot, that spot will go back into the lottery bucket and be assigned to the 1st child on the waitlist.
- And so on and so forth, until all spots for all grades are filled.
- For the first year, we anticipate holding 10% of the spots offered, for faculty and staff children. If these spots are not filled by staff/faculty children, they will be put back into the lottery or be assigned in order to students on the waitlist.
- If a student does not attend the first five days of school, SMCS will make three attempts to reach out to the family to determine if the student intends on attending SMCS. If there is no response after three attempts or the student declines to attend the school, the seat will be offered to the next student on the waitlist. If a student leaves at any time during the school year, their seat will be offered to the student at the top of the waitlist.
- SMCS will continue its enrollment process throughout the school year. Students who are interested in attending SMCS may submit an enrollment form, and their name will be added to the waitlist. If there is not a waitlist, the student will be invited to complete the registration immediately.

LOTTERY PROCESS FOR THE SUBSEQUENT YEARS

For all following years of operation our lottery enrollment process will be as follows:

- Returning/continuing students will be provided with enrollment forms to complete their registration for the following school year, if they intend to return. The registration period for returning students will typically be during the month of January of that school year. At the end of this process, SMCS will have a count of the number of seats available for the next school year's lottery.
- The SMCS lottery will be hosted online and will be open to all residents of New Mexico.
- SMCS will post an invitation to enroll in the lottery on its website with a clear start date, typically in early February.
- SMCS will engage in an outreach campaign to notify the Santa Fe community of the commencement of the enrollment lottery approximately 60 days before the actual commencement date.

- On the commencement date, the enrollment lottery would go live. It would run for 28 days (lottery period).
- Lottery will close at the end of February/early March.
- At the end of the lottery period, names will be picked at random for each grade based on the number of spots being offered that year.
- In all subsequent years, siblings of already enrolled students, children of SMCS employees and military families (as per applicable lottery guidance) will be given a preference.
- Parents will be notified if their child has been picked for a spot. Parents will have 7 days to accept the spot and complete their registration.
- If the number of entries for each grade are equal to or fewer than the spots being offered for that grade, all children who are entered into the lottery for that grade will be offered a spot.
- If the number of entries for each grade are more than the spots being offered for that grade, children who have not been picked for a spot will be placed on a waitlist (also randomly generated).
- If a parent whose child is offered a spot, declines their child's spot, that spot will go back into the lottery bucket and be assigned to the 1st child on the waitlist.
- And so on and so forth, until all spots for all grades are filled.
- If a student does not attend the first five days of school, SMCS will make three attempts to reach out to the family to determine if the student intends on attending SMCS. If there is no response after three attempts or the student declines to attend the school, the seat will be offered to the next student on the waitlist. If a student leaves at any time during the school year, their seat will be offered to the student at the top of the waitlist.
- SMCS will continue its enrollment process throughout the school year. Students who are interested in attending SMCS may submit an enrollment form, and their name will be added to the waitlist. If there is not a waitlist, the student will be invited to complete the registration immediately.

H. Legal Compliance

H. (1) Conflict of Interest Policy

Provide a **current, clear, comprehensive, and cohesive** Conflict of Interest Policy.

SMCS has created a Conflict of Interest Policy that complies with NMSA 11-8B-5.2. The policy addresses conflicts of interest, nepotism, prophylactic measures, as well as steps to address identified conflicts that can be waived as well as violations of the Policy. The School Board shall vote to adopt the Policy once it is formed.

See Attachment 26 - Conflict of Interest Policy

CONFLICT OF INTEREST POLICY

Action Steps

The School Board shall use the Conflict of Interest Policy to identify and analyze any potential conflicts of interest and determine actions in accordance with the policy.

Timelines

The School Board shall vote to adopt the Conflicts of Interest policy at its first meeting.

Responsible Parties

Each member of the School Board, the Head of School, and all staff, are responsible for complying with the relevant sections of the Policy. The Head of School is responsible for educating staff and assuring their compliance. The Finance Committee is responsible for advising on the application of the Policy to financial transactions.

Meeting the Requirements of New Mexico Law

The Policy incorporates NMSA 11-8B-5.2 and provides additional requirements. Through this ‘belt and suspenders’ approach, the School will ensure it complies with legal requirements at a minimum.

Submission Pursuant to the Policy

The policy provides a procedure for proceedings on Conflicts of Interest.

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

I. (1) Third Party Relationships & (2) Third Party MOUs

If there is /are third party relationship(s) (partner organization, a contractor, foundation) that are essential to the existence of your charter school, governance, key instructional staff, or management functions, identify them (entity, person, contact information etc.).

Not Applicable.

J. Transportation and Food

J. (1) Transportation

If applicable, state how the proposed school plans to offer transportation to its students.

For further information, please see the following link:

<https://webnew.ped.state.nm.us/bureaus/transportation/>.

PLAN FOR ESTABLISHING TRANSPORTATION SERVICES

Sun Mountain Community School’s second mission goal is to educate the whole community. This requires that we give all students across Santa Fe the chance to attend our school. We also know that transportation impedes many families, especially economically disadvantaged families, from sending their students to a charter school. Work schedules can limit a family’s ability to drop off and pick up students. So the Foundation Team intends to provide transportation services to the families who could not otherwise manage to transport their children across town twice a day.

Figure 46 - Santa Fe demographics according to zip codes

Zip Codes	87508	87501	87505	87507
Median household income annually	\$87.7K	\$77.4K	\$77.3K	\$60.6K
Percentage living below poverty line	8.7%	8.1%	10.5%	16.6%

Percentage of Hispanics	41%	30%	40%	70%
Percentage of Caucasians	54%	64%	52%	29.3%
Have a Bachelor's Degree or higher	47.5%	61%	52.5%	23%

Because the NMPED requires that charter schools cover their own transportation costs the first year, SCMS will start our transportation process slowly. We will begin with a single route. We will take that first route through the 87507 zip code, as that zip code holds the most “in-need” populations. We estimate needing one bus route for our first 5 years of enrollment. At the end of our third year, once we are at full capacity, we will assess family needs to determine if this is an accurate assessment or if it would be equitable for all families to bring in a second route.

Sun Mountain Community School will ensure transportation is provided to any student requiring transportation per their Individualized Education Plan (IEP).

SMCS has been planning with Martin Herrera, President of Herrera School Buses North, Inc and Skip Hemperley, a coordinator for Herrera’s charter school routes in Santa Fe. Given his experience with charter school ridership in Santa Fe, Mr. Herrera estimates that 20-30% of students will choose to ride the bus. For SMCS’s enrollment, this means that in year one, anywhere from 22-33 students will ride the bus. Herrera’s small buses hold 47 students while their bigger buses hold 55 students (these numbers reflect students K-8; 8-12 more students could fit on the same buses if they were only K-5 students). Because we estimate that these numbers do not fill up the capacity of the buses, the Founding Team will work during implementation year to possibly partner with THRIVE Community School to share bus services, either by staggering our bell schedule or pooling a single route.

SMCS will continue to work with the Santa Fe Public School District in an effort to see if we are able to negotiate transportation. We have already been working with Aliza Marquez of SFPS. If Sun Mountain Community School is unable to secure transportation services from Santa Fe Public School District, we will contract with a private transportation service, likely Herrera School Buses North. SMCS will follow all rules and regulations regarding school bus service contracts, per NMSA-22-16-3.

After discussing the specific needs and population of Sun Mountain Community School, Mr. Herrera agreed to provide SMCS with an estimated to-and-from school cost per bus at \$60,000 per year based on our 180-day school year. This estimated cost includes: 60-90 hours route travel time for routes, 1st pick up to school and in the afternoon dismissal time to last drop off, with 60-90 minute route pick up and drop off. This total is reflected in Appendix G Five Year Budget, Function 2700, Object 55112.

The Founding Team will organize our route in the fall of our implementation year. This way we can clearly inform families of our pick up and drop off hubs as we advertise for our registration process and lottery. Following Sun Mountain Community School’s lottery, families that receive a student seat in our school will be asked about their interest in transportation in the packet that they complete for final enrollment. The Head of School, or determined administrative designee, will work with our contracted service provider to create a bus route that targets ridership in the 87507 zip codes first and then expands through 87505 second, as needed.

During our implementation year we will develop a school safety plan that may include volunteer adults (family members of students that already walk their child to or from the bus stop). Additionally, volunteers would have training and the contact numbers of the SMCS Leadership Team if there is an emergency at a stop that needs support. Additionally, the Head of School or administrative designee

will work with the contractor to manage transportation service and schedules and communicate all other matters necessary to families regarding ridership. See Figure 47 for our transportation timeline.

All policies and procedures for school transportation will be outlined in the Student Handbook and given to parents with the route schedule. The Head of School or administrative designee will work with Herrera School Buses North, Inc. to craft a collaborative document that ensures both students and drivers feel safe and comfortable during daily routes. Once the Handbook has been completed, it will be presented to the SMCS School Board for approval.

Sun Mountain Community School will apply for CSP funding for daily to-and-from school ridership transportation funding in the first year, before NMPED begins transportation allocations in year two. In year two, we will budget \$600 per student riding the bus to pay for the \$60,000 contract.

Actions, Timelines, and Responsible Parties

Figure 47 - Transportation timeline

Timeline	Action	Responsible Parties	Cost
Sept-Nov - Contract transportation Services,	Contract transport services	Head of School	\$60,000
Sept-Nov.	Arrange potential partnerships with other charters school	Head of School	N/A
Sept-Nov.	Plan potential hubs and routes	Head of School	N/A
Sept-Mar	Student recruitment/ ridership interest	Head of School and Founding Team	\$25 per student (see student recruitment line item in budget)
April	Gather transportation needs based upon enrollment paperwork	Head of School or Administrative Designee	N/A
May-June,	Finalize ridership list and plan bus route	Head of School or Administrative Designee, Transportation Contractor	N/A
July	Communicate bus route stops and schedule with families that signed up for transportation	Head of School or Administrative Designee	N/A
August First day of school, first and third weeks of school	staff and students review bus protocols, procedures, and emergency exit use	Head of School or Administrative Designee	N/A

Field Trip Buses

Our school has the good fortune of having the use of three small buses as a part of our relationship with the former Santa Fe Waldorf School. Each of these buses hold 14 students and do not require a CDL to drive. These buses will be used for field trips throughout the year. SMCS will ensure all required licensing, background checks, and proper endorsements are in place for the safe transportation of students. Sun Mountain Community school will provide driver training on school policies, procedures and rules, as well as a general introduction to our discipline policies and procedures and social/emotional programming (as appropriate). This time will also allow for drivers (typically teachers but at times, faculty or parents) to come to the school for a “meet and greet” with their riders.

All policies and procedures for school transportation will be outlined in the Student Handbook and given to parents with the route schedule. The Head of School or administrative designee will work with Herrera School Buses North, Inc. to craft a collaborative document that ensures both students and drivers feel safe and comfortable during daily routes. Once the Handbook has been completed, it will be presented to the School Board for approval.

During implementation year, the following organization of school owned buses will occur:

- Yearly camping trips and concerts will be set in the calendar for each grade, scheduling bus needs.
- The estimate of the fuel needed for these trips has been assessed based on SFWS’s camping and field trip fuel costs. We will apply to the Outdoor Equity Fund (with the Western Resources Advocates) to support this expenditure in the budget.
- Open availability for buses will be determined and made into an on-line signup calendar for teachers to organize field trips far in advance.

Conclusion

As a school committed to teaching the whole child and the whole community, we have included a line item for transportation funds sufficient to ensure that we have accounted for the costs associated with transportation to/from school specific activities and events that are a necessary part of our school mission. These mission-specific transportation needs are included as part of our transportation costs, included in Appendix G Five Year Budget Plan, Function 1000, Object 55817. The specific transportation line item in our 5-Year Budget Plan will cover transportation costs for field and camping trips, across grade levels so that our students are able to attend community events, engage in community-based experiential learning opportunities, and participate in our outdoor education program.

J. (2) Food Services

If applicable, provide a plan to offer food services to students (e.g., contracting with approved/appropriate food service vendors, providing free and reduced lunch).

PLAN FOR FOOD SERVICES

A healthy and nourishing diet is pivotal in ensuring the physical, mental, behavioral and emotional health of our students. At the same time, food insecurity is a real issue for many New Mexican families. Research supports that school food programs such as the USDA National School Lunch Program (NSLP) and the School Breakfast Program (SBP) are linked to an increase in education outcomes for students, lower absentee rates and lower drop-out rates. SMCS enthusiastically supports the State of New Mexico’s ambitious plan to end childhood hunger in New Mexico. The Healthy Universal School Meals program that came into effect in the 2023-24 school year is a game-changer in terms of ensuring access to at least two meals a day for all New Mexican students attending a public school.

Contracting Process, Application and Reporting

SMCS understands that charter schools in New Mexico function as their School Food Authority (SFA). The SMCS School food program will align with the USDA **National School Lunch Program (NSLP)** and the **School Breakfast Program (SBP)**, as well as the **NM Healthy Universal School Meals Program (HUSM)**. SMCS will meet all program guidelines and requirements, including NMAC 6.12.16. The SMCS Founding Team has reviewed the Cost Reimbursable RFP document <https://webnew.ped.state.nm.us/wp-content/uploads/2023/08/Food-Service-Management-Company-FSMC-RFP-Contract-Template-Cost-Reimbursable.docx>, and the Fixed Price RFP document <https://webnew.ped.state.nm.us/wp-content/uploads/2023/08/Food-Service-Management-Company-FSMC-RFP-Contract-Template-Fixed-Price.docx>, the Guidance to School Food Authorities (SFAs) <https://webnew.ped.state.nm.us/wp-content/uploads/2024/02/Contracting-with-FSMC-Guidance-for-SFA.pdf>, as well as USDA Guidance Eligibility Manual for School Meals <https://webnew.ped.state.nm.us/wp-content/uploads/2022/03/E100-Procedures-for-SFAs-USDA-Eligibility-Manual-for-School-Meals-Determining-and-Verifying-Eligibility.pdf>

Responsibilities

Once hired by the School Board, the Head of School will work with the School Board to create the Request for Proposals (RFP). Proposals shall include all costs and specifications for delivery (to and from SMCS), packaging, utensils, storage and serving of all food items. SMCS will work with the selected vendor to review menus, sample items, and set up food storage and serving space on our selected site.

Timeline

Per PED guidance, SMCS will follow the timeline below:

Figure 48 - Food services RFP timeline

Action	Timeframe
Notification of SFA for RFP and Provide TA	November
State Agency RFP Approval	December-January
RFP Release/Solicitation	January
Proposal Meeting and Site Visit Tour (Optional for SFA)	Early February
Proposals Due	End of February

Proposals Scored	Early March
SFA Submits Score Sheet, Proposers Final Contract to State Agency for Approval	March
Notification of Apparent Successful Proposer	End of March
SFA and FSMC Completes Contract	April
Board Approval of Selected Proposer:	April-May
State Agency Approval	May-June
Contract Signed and Executed by SFA and FSMC	June
Submit Signed Contract to the PED	End Of June

SMCS will ensure that our students with specific dietary restrictions, including religious and allergy-based dietary restrictions, receive meals equivalent in quality to our general breakfast and lunch options. We will begin collecting this data as part of our registration paperwork, after our lottery enrollment process. The Office Administrator will keep a detailed list of running dietary restrictions, of both religious and allergy type, and communicate the needs of these students to all teachers and staff. Dietary restrictions, as well as medical needs, will be input into the Student Information System. In addition, a best practices plan will be put into place to ensure that foods are not cross-contaminated with any restricted foods.

Equipment

SMCS also understands that we will need to plan for any needed food service equipment depending on the vendor and menu we select. Our Facilities Master Plan includes a small warming kitchen. Kitchen and food storage equipment that SMCS might need for our warming kitchen may include a food warmer, double-door refrigerator and milk cooler, a steam well, and a salad bar. Post authorization, during our implementation year SMCS will apply for the USDA's National School Lunch Program Equipment Assistance Grants for School Food Authorities to cover the cost of required equipment that does not currently exist in our school facility. SMCS will also apply for the Charter Schools Program (CSP) Grant to help fund the purchase of kitchen equipment.

Training and Inspection Needs

SMCS will satisfy all training requirements and guidelines for food preparation, handling, and cleaning. Any individuals who take on the responsibility of meal support, meal preparation and/or meal service will be required to complete Hazard Analysis and Critical Control Points (HACCP) and annual Civil Rights training, as outlined by the New Mexico Student Success and Wellness Bureau. Pertinent staff and/or volunteers will attend additional training provided or required by the Public Education Department, as necessary. All documentation related to training for those serving food will be organized and filed into personnel files. The SMCS Head of School supported by the Operations Team will facilitate two health inspections each year, to be coordinated with the Environmental Health Department. The New Mexico Public Education Department's School Success and Wellness Bureau must be informed of these two scheduled food safety inspections no later than June 30th. The first inspection must take place before the first day of school.

Vendors Identified

SMCS has begun the process of identifying food vendors for our breakfast and lunch program. We have begun initial conversations with the vendors listed below in which we have gathered information on menu options and services offered. Post authorization and the release of the RFP, SMCS will continue to contact and seek out other food vendor options, prioritizing those that are Santa Fe based and/or New Mexico-local.

Local Foods LLC
21 Cattle Drive
Lamy, 87540

Sunday At Grams
(505) 395-6133
sundayatgrams@gmail.com

Start-up costs for Food Service Reimbursement

New Mexico Public Education Department’s Student Success and Wellness Bureau webpage states that reimbursements typically take four to six weeks after submission of the required paperwork to be received. Based on this information it is our understanding that SMCS will be responsible for covering the cost of the school breakfast and lunch program for the first 48 days of school. We anticipate that the meal reimbursements will be received by SMCS at some point in October. Additionally, per NMSA 22-13-13 gifts or grants may be used to cover the costs of food service, prior to federal reimbursement. If needed, SMCS will look to use contributions and donations from private sources (Code 41920) to cover the initial food service costs for our breakfast and lunch program.

SMCS assumes a cost of \$6.53 per student per day based on 2023-24 reimbursement rates. For the purpose of budgeting, SMCS is estimating a total student population of 75% of enrollment cap for Year 1, 85% of enrollment cap for Year 2, 95% of enrollment cap for Year 3, and 100% of enrollment cap for subsequent years. The table below outlines the costs SMCS anticipates incurring for the first 48 days of school.

Figure 49 - Food Services costs

School Year	Student Enrollment	Total Costs
Year 1 - 2025-26	48 days X 82 students X \$6.53	\$25,702.08
Year 2 - 2026-27	48 days X 132 students X \$6.53	\$41,374.08
Year 3 - 2027-28	48 days X 198 students X \$6.53	\$62,061.12
Year 4 - 2028-29	48 days X 208 students X \$6.53	\$65,195.52
Year 5 - 2029-30	48 days X 208 students X \$6.53	\$65,195.52

References for this section:

- https://www.cdc.gov/healthyschools/health_and_academics/pdf/2014_8_29_health-academics_508tagged.pdf
- https://frac.org/wp-content/uploads/School-Meals-are-Essential-Health-and-Learning_FNL.pdf

K. Facilities/School Environment

Applicants must complete the required Facilities Master Plan Ed. Spec. Checklist form, referenced below as III M. (1), and submit it to the Public Schools Facilities Authority no later than **the published deadline in the month of April**. The Facilities Master Plan/Ed. Spec. Checklist form can be accessed on the PSFA

website at:

nmpsfa.org/legacy/pdf/planning/Charter_School_FMPEd_Specs_Renewal_Program_August_2019.pdf

K. (1) Facilities Plan Checklist

Complete, submit, and attach as Appendix E, the Public Schools Facilities Authority (PSFA) approval of the proposed school's Facilities Master Plan Ed / Spec Checklist.

Please refer to the attached Appendix E, which includes the following:

- PSFA's approval letter for the SMCS Facilities Master Plan and Education Specifications checklist.
- SMCS Facilities Master Plan

K. (2) A Viable Facility

Provide evidence that you have researched facilities/properties and **identified at least one appropriate, viable facility/property in the targeted geographic location.**

Sun Mountain Community School (SMCS) has identified the 8 acre parcel of the lower campus of the former Santa Fe Waldorf School (SFWS), located at 26 Puesta Del Sol, Santa fe, NM 87508 as our preferred facilities for our proposed charter school. SMCS will be offering an educational program based on Waldorf pedagogy. This portion of the campus of the former SFWS is specifically designed and built for a Waldorf educational program. Therefore it meets the specific needs of the educational program and pedagogy of the Sun Mountain Community School (SMCS). We do not anticipate the need for extensive capital improvements within the first term of the charter. Our preliminary discussions with the SFWS Board of Trustees have been positive indicating that their Board is open to leasing the campus to the Sun Mountain Community School.

Please refer to the attached **Appendix E** for additional plans and details about our proposed facility.

III. Financial Framework

A. School Size

A.	1. Projected Enrollment
Rating	Expectations

State the requested enrollment, grade levels to be served, and student/teacher ratio. Please note that this is a projected enrollment. If approved, actual funding will be determined by NMPED School Budget Bureau based on data regarding enrollment membership including, but not limited to, lottery applications submitted, and registrations completed in spring of the implementation year.

Figure 50 - Projected enrollment

Academic Year	Number of Students	Grade Levels	Teacher/Student Ratio
Year 1	108	K-4	1:13
Year 2	156	K-6	1:14
Year 3	208	K-8	1:14
Year 4	208	K-8	1:14
Year 5	208	K-8	1:14
At Capacity (Enrollment Cap)	208	K-8	1:14

B. Budgets

Please note that the PEC will ask the applicants to respond to questions on the budget during the Community Input Hearing. The applicants may have the personnel with the technical expertise with them at the table (and *should* have these people with them if these people were primarily responsible for drafting a section). However, the applicants themselves should demonstrate knowledge and understanding of all areas of the budget.

B. (1) SEG Computation Revenue Estimate Worksheet

Provide, and attach as **Appendix F**, a completed 910B5 State Equalization Guarantee (SEG) Computation Revenue Estimate Worksheet, using appropriate values and computations for each year of the five-year budget plan (use projected unit value and for special education, please budget the local district’s percentage of special education unless the school has a sufficient justification for why it will have a larger population). State and federal funds, including but not limited to student funding, shall not be used to pay, compensate or reimburse contract management organization or education management organization, regardless of their organizational or tax-exempt status. Ensure that your worksheet **clearly demonstrates your understanding of, and your capacity to implement, New Mexico public school funding.**

Sun Mountain Community School has completed the 910B5 State Equalization Guarantee (SEG) Computation Revenue Estimate Worksheet for the five-year budget plan beginning with the SY 2025-2026. These worksheets are attached as **Appendix F**. They were created using the projected enrollment numbers outlined above in **Section III. A. (1)**.

Additional assumptions were made on the Year One (Y1) 910B5 worksheet. As advised, no Special Education MEMs were factored into the SEG computation since the funds for these students may not be allocated during the first fiscal year. The Teacher Cost Index (TCI) of 1.0 was used in the Y1 worksheet. All 82 of the prospective K-4 students would participate in programs that earn the Elementary Fine Arts Program MEM units. The Santa Fe Public Schools (SFPS) AT RISK index of 0.175 was utilized.

The assumptions were updated for Year Two (2026-2027 or Y2) 910B5. After completing one full school year, SMCS will have 80-120 day records used to incorporate accurate Special Education Program MEMs. Special Education MEMs were projected at the New Mexico state average of 18%. A regionally appropriate TCI of 0.994 was used in the Y2 worksheet. Finally, the ancillary FTE for Special Education was updated to match our programming and budgetary line items with 1.5 FTE.

Sun Mountain Community School continued with conservative assumptions in the Year 3 (2027-2028) worksheet. Student enrollment was calculated at 95% of maximum, the TCI index raised to 1.023 to align with the SFPS and an additional 0.5 Ancillary FTE was added in Special Education.

The 910B5 worksheets for Y4 (2028-2029) and Y5 (2029-2030) utilized identical metrics, reflecting the K-8 enrollment at maximum capacity.

B. (2) Five-Year Budget Plan

Provide, and attach as **Appendix G**, a proposed five-year budget plan, fully aligned with the 910B5 SEG Revenue Worksheet that clearly supports the proposed school's mission and aligns with the proposed school's five-year growth plan, including staffing, facilities, educational program, and services. State and federal funds, including but not limited to student funding, shall not be used to pay, compensate or reimburse contract management organization or education management organization, regardless of their organizational or tax-exempt status. Ensure that your draft budget clearly demonstrates the financial capacity and long-term sustainability of the proposed school (consider your growth plan, including staffing, facilities, educational program, mission etc.).

Sun Mountain Community School has prepared a five-year budget plan based on the 910B5 SEG Revenue Worksheets. It includes the proposed enrollment and special education estimates for years 2-5. The five-year budget is attached as **Appendix G**.

B. (3) Budget Narrative

Provide a clear, comprehensive, cohesive, and reasonable budget narrative.

The Sun Mountain Community School (SMCS) developed annual operating budgets that are aligned with the school's mission and strategic goals and are based upon an enrollment picture as stated above with the following assumed parameters.

- Year 1 - enrollment in grades K-4 of 108 students maximum, 82 at 75% capacity.
- Year 2 - expansion to K-6 with enrollment at 156 maximum, 132 at 85% capacity.

- Year 3 - expansion to K-8 with enrollment at 208 maximum, 198 at 95% capacity.
- Year 4 - maintains K-8 with enrollment at 208 maximum, 208 at 100% capacity.
- Year 5 - maintains K-8 with enrollment at 208 maximum, 208 at 100% capacity.

Using the various percentage capacity numbers (rather than the maximum numbers initially) for a more cautious posture gives the General Fund balance the following approximate SEG amounts per year:

- Year 1 - \$ 910,796.97
- Year 2 - \$ 1,475,527.79
- Year 3 - \$ 2,221,518.83
- Year 4 - \$ 2,315,063.61
- Year 5 - \$ 2,315,063.61

Assumptions to the 910B5 SEG numbers in Year 1 include: no Special Education MEM enrollment was factored into the numbers. This results in a very tight budget in year 1. SMCS assumes the additional special education funding to be allocated before the end of the fiscal year, requiring less reliance on federal grant funding.

Year 1

The Sun Mountain Community School will begin by offering K-4 classes with five (5) full-time faculty members plus four (4) part-time faculty members. A full-time administrator (Head of School) will be supported by a part-time Director of Special Education, plus a part-time administrative assistant and contracted members of a Special Education department including: a school counselor, an interventionist, and an educational assistant. The functions of the business office, which includes budgeting, financials, registrar, and auditing will be contracted out. Other pedagogical contractors will include music faculty. An important reason for contracting out the business office functions is to build in a layer of professionalism as well as a check-and-balance, which will help the community have trust in the financial and business office operations.

The full-time faculty members are the lead teacher in kindergarten, kindergarten assistant and the teachers in grades 1-4. Part-time faculty members include a handwork teacher at 40% FTE, a movement/PE teacher at 40%, and a 40% Spanish teacher. Music teachers will be hired as contractors. Faculty base salary in year 1 is \$58,000.00.

In the administration, SMCS will hire a full-time Head of School. The Director of Special Education will begin in a half-time role, which could be augmented if the hire could also serve as the certified school counselor. Subsequently, IF SMCS can solidify CSP grant funding, the Special Education Director could be hired in implementation in a FT capacity. To help with their work, a part-time Administrative Assistant/Office Assistant will be hired at 75% FTE. Base administrative salary in year 1 is \$88,000.00. Support staff base salary is \$40,000.00.

With these employees in place, the General Fund budget comes to \$987,612.15 from \$910,796.75, leaving a General Fund balance of \$(76,815.40). This deficit is the result of not having any funding coming in for Special Education enrollment and the necessity to have a Special Education department up and functioning. In the next four years this discrepancy does not exist. To cover this deficit, SMCS plans on pursuing multiple funding streams including CSP grant funds and establishing an extensive grant-writing program.

Year 2

In the school's second year it will offer K-6 classes with eight (8) full-time faculty members plus four (4) part-time faculty members and contracted faculty for music and woodwork classes. A full-time administrator (Head of School) will continue to be supported by a part-time Director of Special Education, plus a part-time Interventionist and an administrative assistant. Contracted members of a Special Education department include: a school counselor and two (2) educational assistants. Base salary will increase to 90K for the Head of School and \$58,500 for faculty, with incrementally appropriate increases for support staff. Part-time employee percentages will increase to accommodate the addition of two new classes (grades 5 and 6). The functions of the business office, which includes budgeting, financials, registrar, and auditing will continue to be contracted out for another year.

The full-time faculty members are the lead teacher in kindergarten, the kindergarten assistant, and the teachers in grades 1-6. Part-time faculty members include a handwork teacher, a movement/PE teacher at 75%, a Spanish teacher at 75%, and a Nature-studies teacher at 25%. Part-time roles may be combined to create a full-time position. Music teachers will be hired as contractors, with their hours increasing significantly with more grades. The Woodworking teacher will have their contracted hours increased to accommodate the increased number of classes as well.

In the administration, SMCS will continue to have a full-time Head of School. The Director of Special Education will continue in a half-time role, which could be augmented if the hire could also serve as the certified school counselor. Additionally, a Pedagogical Director will be hired in a part-time (50%) capacity. The part-time Administrative Assistant/Office Assistant percentage will increase to 75%. The SPED Interventionist percentage will increase to 75%.

Year 3

The school's third year marks its expansion into middle school, offering K-8 classes with fourteen (14) full-time faculty members and contracted faculty for music and woodwork classes. A full-time administrator (Head of School) will continue to be supported by a Special Education Director, a Pedagogical Director, a SPED Interventionist, and an administrative assistant all of whom are now full-time employees. In addition, a full-time Director of Operations will be responsible for the business office and its functions. Base salaries will increase incrementally with School Board approval.

The full-time faculty members are: the lead teacher in kindergarten, the kindergarten assistant, the teachers in grades 1-8, plus the handwork, movement/PE teacher and the Spanish teacher. Music teachers and the Woodworking teacher will continue on a contractual basis.

In the administration, SMCS will have six (6) full-time members to span K-8 administrative needs. The Head of School, the Director of Special Education, and Pedagogical Director/Dean of Faculty will form a leadership team with the Operations Director and Administrative Assistant supporting them. Part-time members of the Special Education department include two (2) educational assistants, while the school counselor will be on a contractual basis. The business office will contract out financial reporting and auditing functions to ensure financial health.

Years 4 & 5

In the school's fourth and fifth years, the budget picture remains similar to year 3. The faculty and administrative staff levels remain constant, with incremental increases for experience adjusted into all salaries.

Under these personnel and expense line numbers, SMCS generates a positive rollover in the general fund by the end of year 2. The five-year budget model, under these conservative assumptions, is efficient and easily sustainable.

Revenue Assumptions

SMCS used the recommended lower enrollment numbers for more restrained assumptions throughout the budgeting process. The focus is to prioritize mission goals and support a robust educational program, while guarding against overly optimistic projections and to hedge against enrollment declines.

Operational Funding Assumptions

State Equalization Guarantee projected revenue was based on the 910B5 State Equalization Guarantee (SEG) Revenue Workbook provided, while keeping in mind the strong admonition to not include Special Education MEM funding in year 1. The school also used a Teacher Cost Index value of 1.0 for year 1 assuming that this will shift to 0.994 in year 2 and then 1.023 in years 3-5, which is the local average. The At-Risk Index is set at .175, and a constant unit value of \$6,241.67 per member, counted in all five years.

Grants

Charter School Program (CSP) Grant funding is one possibility that SMCS is currently pursuing. These funds could cover any funding shortfall in year 1 or that result of unforeseen changes in enrollment. Various other grant opportunities, federal, state and local, will also be pursued.

Transportation Funding Assumptions

Providing transportation services in year 1 is contingent on CSP funding. During the 2nd year of funding, we will budget \$600 per student for riding the bus. By year two, we are expecting 132 students. Given Martin Herrera's, President of Herrera School Buses North, experience with charter school ridership in Santa Fe, Mr. Herrera estimates that 20-30% of students will choose to ride the bus. For SMCS's enrollment, this means that in year one, anywhere from 22-40 students will ride the bus, equating to \$10,800-\$24,000 in NMPED rebates. So, in the second year, SMCS will either continue to use CSP funding or partner with another charter school and share a bus route. By year 3 and beyond, our estimated bus riders will not cover the contract requirements of a bus route with Herrera's Bus services so a partnership will need to be assured.

Facilities Assumptions

SMCS is fortunate to have an established campus with fully equipped classrooms, common space, beautiful gardens, pinon and juniper trees. The buildings and site are in tune with the educational goals of the program. Currently, this campus is available and has been established as a viable option. Utilities, maintenance, repairs and custodial services are currently included in the lease agreements. After year 5, planning will be needed for finding space and a building for the high school program (grades 9-12).

Supply Assumptions

Again, SCMS is fortunate to be working with a campus that already provides many classroom supplies. Basic annual materials and texts have been factored into the budget. Additional supplies like instructional materials will be budgeted for in the Federal flow-through funds.

B. (4) Budget Adjustments

Provide a **clear and meaningful** description of what budget adjustments will be made to meet financial budget and cash-flow challenges, or to address the failure to receive any anticipated funding sources.

Budget Control Strategies to Meet Financial Budget and Cash Flow Challenges

Sun Mountain Community School will operate with professional fiscal oversight and with people skilled and certified in the budgeting process. Our community and the School Board will have processes and people in place to ensure the smooth functioning of financial operations at the school.

Budget control strategies include having experienced people able to respond flexibly to unforeseen events and financial challenges that may impact budget assumptions. Adequate and proactive planning is paramount with multiple backup plans already thought through. This speaks to having enough business office staff or support so these important positions are not overwhelmed and overworked.

Specific budget control strategies include:

- Regular meetings between the Head of School and Operations Director (or contracted partner) to address any changes and to remain flexible to budgeting issues as they arise
- Establishment of a reasonable timeline for the budgeting process
- Development and implementation of a strategic annual budget
- Vital information sharing between school offices
- Using financial expertise of contractual hires as well as community members in board oversight roles
- Adjusting financial policies or procedures to improve financial operations
- Sharing bad news responsibly and clearly to key school members including faculty so that creative solutions may come from all areas of the school
- Delivering accurate and timely reports of financial operations and condition

Specific cash flow control strategies include:

- Tight overview and control of school credit card use and teacher spending each month
- The establishment of a small cash reserve when possible to help smooth over any gaps
- Providing a cash-flow report to the School Board along with other statements of financial condition

Within the budgeting review process, SMCS will exercise the proper diligence in regards to spending compliance requirements for federal and state revenues. SMCS will develop the school budget with a strong commitment to using public funds prudently, while keeping in alignment with the school's mission and vision. The budgeting process will also be set in an appropriate time frame so that the budget will meet guidelines set by NMPED.

Budget Control Strategies to Address Failure to Receive Anticipated Funding

Sun Mountain Community School understands that should anticipated funding not materialize, the first choice would be to make up the difference by raising additional funds through grants. Barring any outside funds, faculty and staff positions would need to be consolidated and stream-lined as salaries constitute a majority of the school's operating budget. In the initial years this may mean more cuts or delays in hiring administrative staff and skills teachers, as well as contracted positions.

How Special Education Students will receive Services before Funding is Provided

Sun Mountain Community School is committed to providing necessary support for students with special needs. We assume our student body will consist of at least 18% special needs students (the state average) from day one of operations, although Special Education funding will not be identified until after the 40-80-120 day counts. Therefore, in Year 1 the budget accounts for a Special Education Director, a certified SPED Interventionist and an educational assistant, comprising the Special Education staff. This team will serve to meet the needs of all students by completing necessary evaluations, assessing and updating current Independent Education Programs and providing individualized services and support. These positions are funded through instructional and support services from the General Fund.

Addressing Gaps between Budgeted Students and Actual Enrollment

Reporting will be important as any gaps between budgeted student counts and actual enrollment on the 40-80-120 day counts will affect budgets. Close collaboration between the business office and the Head of School will help monitor this situation.

Budget Modifications for Students with Special Needs

Sun Mountain Community School understands that enrollment may include students who require special education services per an IEP completed at a prior school that will need to be continued at SMCS, and will not receive the funding until the following school year. The proposed budget anticipates this delay and has included in year 1 a Special Ed Director to manage student IEP caseload and a budget for various services as needed. The school plans to contract specialists initially and will also identify the required services per individual IEP and consider next steps with the providers while considering costs.

C. Financial Policies, Oversight, Compliance, and Sustainability

C. (1) Internal Control Procedures

Provide a description of the internal control procedures.

See **Appendix H**, Internal Control Procedures.

SMCS 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). We will follow all applicable laws and regulations that govern Charter Schools within the State of New Mexico. As a Board of Finance, the School Board is entrusted with funds issued by government agencies, private foundations, and individual contributors, and it will adhere to the highest of standards of fiduciary responsibility. Clear financial policies and procedures will enable the school to meet its financial needs and obligations, will ensure long-term financial stability and viability, and will protect its tangible assets and reputation.

The responsibility for good internal control lies within the administration of the school. The Head of School, with the support of the School Board, will set the objectives, put the control mechanisms and activities in place, monitor and evaluate the controls and set the general tone of the organization. However, all personnel in the organization play important roles in an effective and efficient operation.

C. (2) Staff to Perform Financial Tasks

Identify the appropriate staff to perform financial tasks.

In the first two years of operation, Sun Mountain Community School (SMCS) will contract with a licensed financial management firm. We have made contact with the Vigil Group and the former Santa Fe Waldorf school has a historical working relationship with Axiom Accounting and Professional Business Advisory that can be leveraged. The School Board will elect one of the aforementioned firms to be contracted as our business management group before the implementation year begins.

Our proposed growth plan allows for us to hire an Operations Director by year 3, and bring a majority of the financial management in-house.

Operations Director

The Operations Director will be responsible for the planning, coordinating and managing of the day-to-day business operations of the school under the direct supervision of the Head of School. This individual will also be responsible for overseeing all aspects of school food services, transportation and procurement. In addition, they will also assist the Head Of School in pursuing grant opportunities and developing the annual and three year look ahead budgets. This individual will also attend board meetings at the invitation of the School Board as well as work directly with the Finance Committee and Treasurer of the School Board alongside the Head of School. Once this is a full time position with SMCS, this individual will also be responsible for enrollment, outreach, recruitment and communications as well as student information systems and transcripts.

Reports To: Head Of School

Supervises: N/A

Minimum Qualifications

- Bachelor's Degree
- School Business Official certificate
- Experienced in using bookkeeping software such as Quickbooks, student information systems, website building

Essential Job Duties

- Planning, coordinating, and managing the day-to-day business operations of the school
- Managing financial transactions, billing, reporting
- Leading the preparations for fiscal audits
- Leading the development of the annual school budget
- Collaborate with the Head of School to research and apply to grants, manage and distribute received grants, and report activities related to grants
- Work with contracted vendors, supervise the daily accounting of the school, including accounts payable and receivable, cash receipts, payroll and benefits, general ledger, taxes, and allocation of non-financial resources in collaboration with the Head of School
- Management of food service bids and contracts for school nutrition, including meals and snack in collaboration of the Head of School
- Managing the admission and enrollment process, including the school lottery
- Send out Student Transcripts
- Manage student information system

Leadership Qualities

- Commitment to, belief in, and alignment with the mission of the school, its goals, and public Waldorf education
- Extensive data management and reporting skills
- Proven ability to multitask effectively and prioritize strategically
- Experience working with budgets, accounting, and allocation of school resources
- Excellent verbal and written communication skills
- Strong growth mindset

C. (3) Proper Legal and Fiscal Oversight by School Board

Provide a **clear, comprehensive, and cohesive plan** for how the Governing Body will provide proper legal and fiscal oversight.

If SMCS is granted a charter, the governing body, the School Board, will be formed soon after notice that the charter has been awarded. The Founding Team has a list of well qualified candidates and the goal will be to form the School Board as quickly as possible in the Fall 2024, including the School Board complying with the requirements to become and becoming an approved Board of Finance. Soon after the formation of the School Board, the Audit and Finance Committees will be formed in accordance with the Bylaws (Appendix A), beginning first with the Finance Committee.

The Finance Committee shall include School Board Members with significant experience in finance with backgrounds in entrepreneurship and business finance, public sector finance, school finance, and other relevant areas of financial expertise. In addition to School Board Members, the Finance Committee shall also include the Head of School and the Operations Coordinator (and beginning in Year 3, Operations Director), and may include other employees of SMCS whose roles intersect with finance. The Treasurer of the School Board shall also be a member of the Finance Committee.

The Finance Committee shall meet regularly at intervals appropriate in each phase of each year and shall review and monitor the financial picture of the school. The Finance Committee will work with the Operations Director/Coordinator to ensure SMCS remains in compliance with all finance-related rules, statutes, regulations, and policies.

The annual school budget shall be prepared by the Head of School and the Operations Coordinator/Director, with input and support from the Finance Committee. Once prepared, it will be presented to the full School Board for approval. Once final, the School Board is responsible for approving the annual budget at an open meeting held in accordance with the Open Meetings Act.

The Finance Committee shall also be tasked with making recommendations to the full School Board on financial planning, revenue and expenditure items, procurement of contracts greater than \$10,000, and any work towards future capital improvement projects. The full School Board shall vote and approve any annual contracts greater than \$10,000; the Head of School shall have procurement authority on contracts less than \$10,000 annually.

The Head of School and Operations Coordinator/Director, in conjunction with an outside education back-office support vendor if the school hires such a vendor, shall provide the School Board and Finance and Audit Committees with regular financial reporting as well as any additional financial reporting or information as needed.

The Finance Committee shall also provide oversight and advice related to application of the school's Conflict of Interest Policy (see Attachment 26) as relates to financial transactions.

The School Board's Audit Committee shall also provide fiscal and legal oversight for the school. The Audit Committee's primary role is to assure the school's annual audit process occurs in compliance with all laws, regulations, and internal policies, and serves the mission of the school. The Audit Committee will consist of a majority of members who are not also members of the Finance Committee, and will include people with professional experience related to audits. The Audit Committee may include members with audit expertise that are not members of the School Board when needed for the committee to gain the relevant expertise.

The School has budgeted \$15,000 annually for an audit with a state-approved auditing firm. The Audit Committee will meet with the auditing firm and guide the audit process for both special and annual audits at the beginning of the audit process, regularly during the course of the audit work, and at the conclusion of the audit. The Head of School and Operations Director/Coordinator, in conjunction with any future outside financial services vendor, will assure that the school maintains all reports and information needed to complete a compliant audit, and that the auditing firm has access to such necessary information during its work.

The Audit Committee shall review the audit report from the outside auditor and meet with the outside auditor to receive the audit report. The Audit Committee is responsible for presenting the findings to the full School Board annually and to be available to regularly coordinate communications between the auditor and the School Board. If the audit reveals findings that require the school to address problems or create new policies and practices, the Audit Committee will develop a strategic plan to address such issues and present the plan to the School Board. With input from the School Board, the strategic plan will then be presented to the Leadership Team for implementation. If changes to existing school financial policies or practices are necessitated, the Finance Committee shall create and recommend such changes to the full School Board, which shall vote to accept and implement them.

The Audit Committee shall be composed of at least two School Board Members, one member who is a parent of a current SMCS student, and one member with experience in accounting or finance. The Head of School and Operations Director shall serve as ex-officio members of the Audit Committee as well. The Audit Committee shall assure compliance with the Audit Act [12-6-1 through 12-6-14 NMSA 1978] and rules of the state auditor.

Both the Audit Committee and the Finance Committee shall interact with the School Board to assure the committees are meeting their statutory mandate, while preserving the School Board's role as the governing body of SMCS. This means that the committees will each recommend and work on issues and solutions pertinent to financial and audit matters, often in conjunction with Head of School and Operations Director/Coordinator, but the full School Board shall always vote to take action or make any decisions on matters that require Board-level approval at SMCS. The committees are not decision-making bodies, rather they provide oversight and expertise.

IV. Evidence of Support

A. Outreach Activities

Provide **clear, comprehensive, and cohesive** evidence that you have developed an effective and thoughtful outreach program.

The Sun Mountain Community School (SMCS) is a community of families and educators dedicated to cultivating the intellectual, social, emotional, physical and consciousness capacities of the developing human being. Our mission is to educate the whole child, using an age-appropriate approach to content and skills based on principles of Waldorf Education and the work of Rudolf Steiner. Our students engage in rigorous academics, develop connections to the natural world and moral discernment, and achieve an appreciation of themselves and others.

OUTREACH PROGRAM

Sun Mountain Community School centered its outreach to garner input regarding needs and support desired by our community, to elicit support for our proposed Charter and to establish relationships with area businesses and nonprofits for future collaborations. Our outreach program was well thought out, as we devised a plan to reach out to a wide variety of community members through phone calls, emails, Town Hall meetings, outreach tables and one-on-one meetings. Our outreach activities are broken down into seven categories:

- Listening Campaign
- One-on-one meetings and/or phone calls with area businesses and nonprofits
- One-on-one meetings and/or phone calls with area educators
- One-on-one meetings and/or phone calls with alumni parents and students
- Town Hall Meetings
- Outreach table at community events
- Web Based Presence

Outreach Activities Implemented

Through our efforts, the Sun Mountain Community School has assimilated an outreach team consisting of three members: Rachel Machovec, Adriana Hershey, Zoe Wilcox and Daniel Wendland. All three members are former staff, Waldorf teachers and/or motivated parents. These members helped promote the Waldorf Charter initiative through emails, phone calls and one-on-one meetings, staff informational booths, Town Hall presentations and sharing, and helped us with Spanish translations and outreach. Outreach materials have been translated into Spanish to help us connect with that part of our Santa Fe community. Figures below provide information regarding the various one-on-one meetings, Town Halls and informational booths that have been held as part of the outreach. This serves as documentation of our outreach efforts, and in no way is meant to serve as evidence as an endorsement for Sun Mountain Community School.

During our outreach meetings, depending on the category of stakeholder, the following questions were asked:

- What do you know about Waldorf Education and would you like to know more?
- Knowing what Waldorf Education can be, how do you think a Waldorf Charter School could benefit children that they may not receive now in a current public school setting?

- Do you see a need for Santa Fe to have a Waldorf Charter School option?
- Would you consider sending your children to a Waldorf Charter School?
- Considering how your organization serves children, do you think our proposed charter school could contact you to discuss a possible future collaboration if our charter is approved?

OUTREACH ACTIVITIES DURING APPLICATION PROCESS

Listening Campaign

Even before we began writing our charter application, the former Santa Fe Waldorf School Board initiated a “Listening Campaign” in the months of December 2023-January 2024. Each board member was tasked to interview 5-8 members of our school community. We had a set list of questions that gave the listeners feedback on whether or not they wanted Waldorf education to continue in the community, whether they would prefer a public effort or a private effort, what would they need to see in the effort to get behind it, and would they volunteer for it? A total of 42 one-on-one conversations were had and 42 members of the community expressed their opinions about the future of the Waldorf education in Santa Fe. Here are the outcomes from those conversations:

- Overwhelming support for a Waldorf Education option in Santa Fe
- Overwhelming support for a Charter Waldorf School in Santa Fe
- There is a market for Charter School options in Santa Fe, especially a middle school option
- The concern if a Waldorf-inspired Charter school would be able to adhere to the Waldorf Curriculum, methods and principles
- Acknowledgement that clear rules, policies, laws, and regulations would greatly improve the private model
- Waldorf education model would greatly benefit/ serve a more diverse student body

Emails & One-on-One Meetings

The founding members of the SMCS have reached out to the sub groups below through phone calls, emails and one-on-one meetings to inform and garner support for our Charter Initiative. An example of our email template can be found here:

See Attachment 27 - Outreach Email Template.

The goals of these outreach activities included:

- To inform our community of our initiative, and of the timeline
- To educate our community about what makes Waldorf education unique, as well as what the charter model entails, and how we plan to integrate the two
- To gather community feedback about their satisfaction with available education options via this bilingual survey.
See Attachment 28 - Educational Options K-12 Bilingual Survey.
- To receive community input for a proposed charter school name via this bilingual survey.
See Attachment 29 - School Name Bilingual Survey.
- To invite a broad community to attend Town Hall meetings, and receive answers to questions they have regarding the Charter Initiative

- To solicit support from individual community members through volunteering their talents and skills in order to support the Charter Initiative
- To request written support of the Waldorf Education option from constituencies familiar with the former Santa Fe Waldorf School (alumni parents and/or students, local businesses, community organizations, educators and educational institutions)
- To broaden the support of the Charter Initiative by former private school families, using our presentation tool as a town hall, “Top 6 Reasons to Support a Charter Initiative.

See Attachment 30 - Top 6 Reasons to Support a Charter Initiative.

We also gave regular “Charter Committee Updates” to our 900+ count email list.

Figure 51 - One-on-one meetings with community organizations, educators, and businesses

Date	Organization	Person	Title
1-15-24	Gradalis Waldorf Teacher Education, Colorado	Jennie Baudhuin	Teachers’ Instructor
2-15-24	North Fork School of Integrated Studies, Colorado	Christi Gubser	School Director
2-22-24 3-27-24	Waldorf Parents and Tots, Santa Fe NM	Jill McCormick	Coordinator and Teacher
2-24-24	Gradalis Waldorf Teacher Education, Colorado	Stephanie Skinner, M.A.	Early Childhood Field Mentor
2-26-24	Alliance for Public Waldorf Education (National)	Liz Beaven	President
3-3-24	Monte del Sol Charter School, Santa Fe NM	Elliot Ryan	Special Education Coordinator
3-4-24	Alliance for Public Waldorf Education (National)	Liz Beaven	President
3-14-24	Public Charter Schools of NM	Valery Ratliff-Parker, Chris Narkun	Deputy Director, CSP Grant Manager
3-17-24	THRIVE Community School, Santa Fe NM	Sean Duncan	Director
3-19-24	Praising Earth (non-profit organization), Santa Fe NM	Tim McLaughlin & Madi Sato	Owners and Founders
4-1-24	Wise Fool NM, Santa Fe NM	Kristen Woods	Co-Executive Director, Youth/Teen Programs Coordinator

4-3-24	Independent Waldorf Movement Leader	Karleen Whitcomb	Volunteer Organizer
4-3-24	Cognia (Global Network for Educators)	Gregory Howell	Client Services Director
4-3-24	Public Charter Schools of New Mexico	Vallery Ratliff-Parker	Deputy Director
4-10-24	Mountain Song Community School, Colorado	Karl Johnson	Pedagogical Director
4-12-24	Mountain Song Community School, Colorado	Sarah Kreger	Director of School Performance
4-15-24	Montessori of the Rio Grande, Albuquerque NM	Deborah Henwood	Head of School
4-16-24	Montessori of the Rio Grande, Albuquerque NM	Chris Parrino	Business and Finance Director
4-15-24	Santa Fe School for Art & Sciences, Santa Fe NM	Todd Stiewing	Principal
4-22-24	Meadow Speech Therapy, Santa Fe NM	Mia McMullen	Owner
4-22-24	Santa Fe Preparatory School, Santa Fe NM	Aaron Schubach	Head of School
4-22-24	Climate Advocates Voces Unidas, Santa Fe NM	Kurt Gutjahr & Phil Lucero	Executive Director & Education Director
4-29-24	Dragonfly Art Studio, Santa Fe NM	Oceanna Holton	Owner & Creator
4-29-24	Reading Quest, Santa Fe NM	Rayna Dineen	Executive Director
5-3-24	Capital High School, Santa Fe NM	Lisa Vigil	Associate Principal
5-6-24	Santa Fe Girls School, Santa Fe NM	Rosie Williams	Co-Director
5-10-24	Santa Fe Waldorf School , Santa Fe NM	Nicole Gent	Teacher, Early Childhood
5-13-24	Santa Fe Public Schools	Raquel Castilla	Spanish teacher
5-16-24	SFPS Dept. of	Alisa Marquez	Business Operations

	Transportation, Santa Fe NM		Specialist
5-16-24	Herrera School Buses and Coach, Santa Fe NM	Martin Herrera	President
5-16-24	Herrera School Buses and Coach	Skip Hemperley	Santa Fe Route Coordinator
5-19-24	Thrive Community School, Santa Fe NM	Sean Duncan	Co-Founder & Director
5-20-24	Children's Adventure Company, Santa Fe NM	Sarah Daniels	Owner/Director
5-20-24	Randall Davey Audubon Center & Sanctuary, Santa Fe NM	Katie Weeks	Director of Community Education
5-24-24	Many Mothers, Santa Fe NM	Kai Forsley	Executive Director

Figure 52 - One-on-one meetings with stakeholders, alumni parents & graduates, and future interested families (Not an official representative of organization)

Date	Stakeholder Category	Person
12-15-23	Community Member	LoAnn Olin
12-15-23	Community Member	Kate Ater-Vasquez
12-15-23	Community Member	Sascha Andersen
12-15-23	Community Member	Hilario Chavez
12-15-23	Community Member	Julia Brogge
12-15-23	Community Member	Aske Range
12-15-23	Community Member	Micayla Duran
12-17-23	Community Member	Sally Strong
12-18-23	Community Member	Daisy Barnard
12-18-23	Community Member	Elliot Ryan
12-18-23	Community Member	Scott Deily
12-18-23	Community Member	Diane Perlman

12-19-23	Community Member	Erin O'Neill
12-19-23	Community Member	Jen Hollander
12-19-23	Community Member	Sunny Rose-Healey
12-20-23	Community Member	Sarah Jane Moody
12-20-23	Community Member	Rachel Machovec
12-22-23	Community Member	Eduardo Yi
12-22-23	Community Member	Elaine Germano
1-2-24	Community Member	Michelle Torrez
1-3-24	Community Member	Abigail Wolaver
1-5-24	Community Member	Nina Ross
1-5-24	Community Member	Liza Stanton-Hitt
1-5-24	Community Member	Mark Jensen
1-6-24	Community Member	Ben Hoffacker
1-6-24	Community Member	Nina Ross
1-7-24	Community Member	Cheryl Linett
1-7-24	Community Member	Shannon Gilmore
1-8-24	Community Member	Erly Carzyhorse
1-8-24	Community Member	Christian Yi Sandino
1-8-24	Community Member	Julia Broggi
1-8-24	Community Member	Wendy Hitt
1-10-24	Community Member	Joan Kennedy
1-11-24	Community Member	Adriana Hirshey
1-11-24	Community Member	Todd Stiewing
1-11-24	Community Member	Barb Booth
1-12-24	Community Member	Grietje Laga
1-12-24	Community Member	Adrienne Harper
1-13-24	Community Member	Leland Guthrie

1-14-24	Community Member	Emily Leonard
1-14-24	Community Member	Miguel Licona
2-23-24	Santa Fe Waldorf Alumni Parent	Melissa Coleman
3-18-24	Waldorf Community Town Hall	73 non-organizer attendees
3-19-24	Community Member	Chloe Copeland
3-23-24	Community Member	Dave Caldwell
3-23-24	Community Member	Lis Desmond
3-26-24	Community Member	Aske Range
3-30-24	Community Member	Faith Yoman
4-6-24	Alumni Employee	Barb Booth
4-6-24	Alumni Parent	Valerie Richard
4-6-24	Alumni Employee	Judy Nix
4-8-24	Santa Fe Waldorf Graduate Class of 2011	Michael Freitas
4-11-24	Community Member	Michelle Torrez
4-11-24	Community Member	Lindsey Alexander
4-14-24	Santa Fe Waldorf Graduate Class of 2013	Sophia Richard
4-15-24	Santa Fe Waldorf Graduate Class of 2020	Nicoya Dant
4-16-24	Santa Fe Waldorf Graduate Class of 2021	Deedee Jansen
4-16-24	Santa Fe Waldorf Graduate Class of 2022	Andres Gonzales
4-17-24	Santa Fe Waldorf Graduate Class of 2019	Rose Moon
4-17-24	Santa Fe Waldorf Graduate Class of 2019	Maya Crosby
4-17-24	Santa Fe Waldorf Graduate Class of 2019	Rosa Contreras
4-17-24	Santa Fe Waldorf Graduate Class of 2019	Hannah Laga Abram
4-17-24	Santa Fe Waldorf Class of 2024	Daisy Russell
4-18-24	Santa Fe Waldorf Graduate Class of 2021	Lily Clark
4-18-24	Community Member	Rachel Sowards
4-20-24	Santa Fe Waldorf Graduate Class of 2020	Koray Gates

4-20-24	Santa Fe Waldorf Graduate Class of 2020	Story Coleman
4-23-24	Alumni Employee	Chris Sciarretta
4-23-24	Santa Fe Waldorf Graduate Class of 2010	Brad Linch
4-25-24	Alumni Employee	Everett Cole
4-25-24	Alumni Employee	Susanna Green
4-25-24	Alumni Employee	Raquel Castilla
4-27-24	Bilingual Books & Babies at Southside Library	Various Santa Fe Community members
4-30-24	Santa Fe Waldorf Graduate Class of 2020	Colibri Yellowhorse
4-30-24	Alumni Parent	Leslie Barnard
4-30-24	Alumni Parent	Dana Barnard
4-30-24	Alumni Parent	Lise Knouse
5-1-24	Santa Fe Waldorf Graduate Class of 2013	Josh Hagen
5-2-24	Genoveva Chavez Community Center	Various Santa Fe Community members
5-2-24	Alumni Parent	Dameron Midgette
5-5-24	Santa Fe Waldorf Graduate Class of 2015	Cecelia Barnard
5-5-24	Santa Fe Waldorf Graduate Class of 2015	Abel Knouse
5-6-24	Alumni Parent	Janine Pearson
5-6-24	Alumni Parent	Tom Kaczmarek
5-6-24	Alumni Parent	Brian McPartlon
5-6-24	Alumni Parent	Dina Jansen
5-6-24	Alumni Parent	Jill Gerichter
5-6-24	Alumni Parent	Jack Dant
5-6-24	Community Member	Jan Heffner
5-8-24	Santa Fe Waldorf Graduate Class of 2017	Sophie Linett
5-9-24	Community Member	Nicholas Stinson
5-9-24	Alumni Parent	Mary Freitas

5-9-24	Alumni Parent	Carole Cressman
5-9-24	Community Member	Allyson Leach-Heid
5-9-24	Santa Fe Waldorf Graduate Class of 2017	Aydin Gates
5-9-24	Alumni Parent	Steve Gates
5-9-24	Alumni Parent	David Burling
5-10-24	Santa Fe Waldorf Graduate Class of 2015	Dhyana Severson
5-10-24	Alumni Parent	Carolyn Clark
5-12-24	Santa Fe Waldorf Graduate Class of 2014	Alex Kravitz
5-13-24	Alumni Parent	Keri Goorley
5-15-24	Santa Fe Waldorf Graduate Class of 2016	Sean Ramsey
5-17-24	Santa Fe Waldorf Graduate Class of 2015	Keifer Nace

Town Halls

The Waldorf Charter Initiative committee hosted three Town Halls, all on the campus of the former Santa Fe Waldorf School.

- The first Town Hall was attended by thirty nine (39) people, in person and over zoom. We used our 900+ email list from the Santa Fe Waldorf School. We introduced our Charter Committee team and our intentions as well as our timeline. We took a lot of questions from audience members.
- The second Town Hall was attended by fourteen (14) people, was a gathering with a speaker, Eduardo Yi. Eduardo spoke about what makes Waldorf education unique. Afterwards, we went into details of how the proposed charter school will look different from the private school familiar to many of the community members. We initiated a vote for the name of the charter school and took questions from the community.
- The third Town Hall was targeted for a broader audience than the first two and was attended by thirty three (33) people. We advertised for the town hall in the Santa Fe Reporter, through our partner, Wise Fools' email list, through fliers posted at the Southside and La Farge library, and on our Facebook page.

Figure 53 - First town hall attendees, March 18th, 2024

First Town Hall - Introduction of Intention and Timeline	
Name	Stakeholder Category
Kirsten Hardbrook	Community Member
Jamie Fahey	Community Member

Alfredo Blea	Community Member
Kacie Smith	Community Member
Faith Yoman	Alumni Parent
Arina Pittman	Alumni Employee and Parent
Michelle Torrez	Community Member
Valente Torrez	Community Member
Kathleen Taylor	Alumni Employee
Ruth Lathrop	Community Member
Fletcher Lathrop	Board Member & Alumni Employee
Michael Oellig	Alumni Employee
Amy Pine	Alumni Employee
Acacia Gilmore	Community Member
Rachel Dixon	Community Member
Vanessa Kaczmarek	Community Member
Chloe Copeland	Community Member
Sara Wolcott	Community Member
Nick Wolcott	Community Member
Gillian Mickelson	Community Member
Vara Brahms	Community Member
Jacob Shapiro	Community Member
Taylor Romens	Alumni Employee
Rachel Machovec	Community Member
Adriana Hirshey	Community Member
Brad Hirshey	Community Member
Kate Latimer	Community Member
Dinae Kinzie	Community Member
Thomas Baudhuin	Community Member

Jennie Baudhuin	Community Member
Timothy McLaghlin	Community Member
Madi Sato	Community Member
Breanna Roscoe	Community Member
Britney Brinker	Community Member
Adrienne Harper	Community Member
David Wilcox	Community Member
David Bronstein	Community Member
Aske Range	Community Member
Sarah Jane Helvey	Community Member
Andy Smith	Board Member
Briana Bassler	SMCS Founder
Jessica Wireman	SMCS Founder
Jayita Sahni	SMCS Founder
Zoe Wilcox	SMCS Founder
Daniel Wendland	SMCS Founder

Figure 54 - Second town hall attendees, April 15th, 2024

Second Town Hall - Describing the Differences to Expect in Publicly Funded Waldorf Education	
Name	Stakeholder Category
Kacie Smith	Community Member
Ted Weber	Community Member
Micky Leach	Board Member & Alumni Parent
Kelley Koehler	Community Member
Jessica Wireman	Community Member
Rachel Dixon	Community Member
Adriana Hirshey	Community Member

Brad Hirshey	Community Member
Valente Torrez	Community Member
Michelle Torrez	Community Member
Amy Pine	Community Member
Vanessa Kaczmarek	Community Member
Tom Kaczmarek	Community Member
Acacia Gilmore	Community Member
Andy Smith	Board Member
Briana Bassler	SMCS Founder
Jessica Wireman	SMCS Founder
Jayita Sahni	SMCS Founder
Zoe Wilcox	SMCS Founder
Daniel Wendland	SMCS Founder

Figure 55 - Third town hall attendees, May 8th, 2024

Third Town Hall - Structural Layout of Governance, Academic Programs, and Finances	
Name	Stakeholder Category
Anne Meade	Community Member
Sunny Rose	Community Member
Mo Charnot	Local Paper Reporter
Travis Lathrop	Board Member
Brenna Farrow	Alumni Employee and Parent
Faith Yoman	Alumni Parent
David Burling	Alumni Parent and Board Member
Varda Brahms	Community Member
Adriana Hirshey	Community Member
Brad Hirshey	Community Member

Matthew Naivar	Community Member
Michelle Torrez	Community Member
Valente Torrez	Community Member
Andy Smith	Board Member
Deb Midgette	Community Member
Kacie Smith	Community Member
Marya Morales	Community Member
RT	Community Member
Timothy P McLaughlin	Community Member
Varda B	Community Member
Christina	Community Member
Christa Valdez	Community Member
Taylor Romens	Community Member
Matthew Burritt	Community Member
Andy Smith	Board Member
Briana Bassler	SMCS Founder
Jessica Wireman	SMCS Founder
Jayita Sahni	SMCS Founder
Zoe Wilcox	SMCS Founder
Daniel Wendland	SMCS Founder

Community Survey

In an effort to more thoroughly understand the needs of both our former private school community as well as the broader Santa Fe-wide community, SMCS created a bilingual survey (see Attachment 28), in time for our first Town Hall, March, 2024. The survey inquired how much they knew about Waldorf education, whether families would send their child to a Waldorf charter school, if they were satisfied with their current educational experience, and, if they weren't, what they were looking for. We distributed the survey online, through email lists as well as through direct personal engagement as follows:

- Santa Fe Waldorf School email list
- Facebook
- Wise Fool's community email list

- Jill McCormick’s Parent and Tot class
- La Cienega Community Breakfast
- An SFWS Alumnus’s baby shower
- At three Town Hall Meetings
- Outreach booths: we created a handout with QR Codes that we distributed at our outreach booths at various community events and locations, viz., the Southside Library, Genoveva Chavez Community Center & the Santa Fe Farmers Market
- We also reached out to individual community members in one-on-one conversations to fill out and market the survey.

Here are the results of our community survey:

Figure 56 - (Pie Chart) Are you familiar with Waldorf education?

Figure 2 - Are you familiar with Waldorf education?

115 Responses

● Very knowledgeable ● Knowledgeable ● Some Knowledge ● Unfamiliar

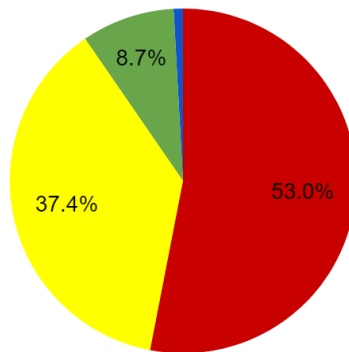


Figure 57 - (Pie Chart) Does your child feel emotionally held at their school?

Figure 5 - Does your child feel emotionally held at their school?

115 Responses

● Yes ● No ● I do not have school age children

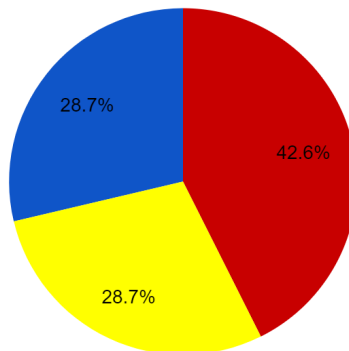
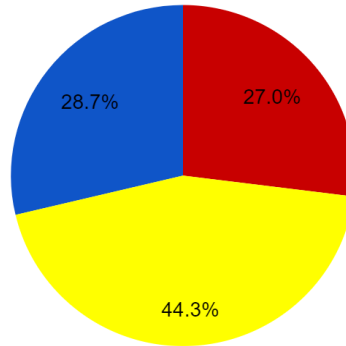


Figure 58 - (Pie Chart) Does your child have enough outdoor time at their school?

Figure 6 - Does your child have enough outdoor time at their school?

115 Responses

● Yes ● No ● I do not have school age children



When asked if you are unsatisfied with your child's current school, what are you looking for, responses included (verbatim):

- No screens in the classroom, supportive creative teacher
- I am about 70% OK with our new school but the 30% grieving the loss of Waldorf and that particular pedagogy.
- Low stress academics, wilderness education, music & poetry emphasis
- We miss the Waldorf school so much
- A more nurturing school with more outdoor time, a connection to nature, art, music, and emotional learning. Less screens. Learning through movement.
- I am ok with the school but miss Waldorf and felt it was a more whole experience.
- A more holistic experience like they had at Waldorf.
- We are unsatisfied. We are looking for a school that is stable, nurturing, and encourages a love of learning over simply academics. We are looking for a school that is interested in the entire human being.
- I'm looking for a Waldorf school.
- More freedom for their learning experience. My daughter calls her school the jail and she misses Waldorf greatly.
- We want to have our younger son enrolled in a Waldorf education
- I am looking for a charter Waldorf community. An environment that is supportive of child development and has a curriculum that supports all aspects of the self. An environment that supports appropriate learning activities for their ages and development. An environment that does not rely on the use of screens for testing and work and has ample outdoor time.
- A holistic education that integrates movement, art, music and academics, with a generous amount of time spent outdoors. A teacher-led classroom without the distractions of media/smartboards. A school day that provides enough time for social engagement with peers and outdoor play time. A learning environment that emphasizes care towards materials, handwriting, books, belongings, learning environment and each other.
- Holistic education of the whole child
- Fingers crossed for a Waldorf Charter!

- We are looking for more opportunities to have our children & ourselves to be included within the school community. We'd also like more exploration of personal preferences in education and a motivating multi-sensory environment.
- We chose to homeschool because we could not afford full tuition at a Montessori school and we're unhappy with how a public school handled a situation with our daughter. The school she began the school year in also relies heavily on technology and keeps children indoors for most of the day.
- If I had a child I would be looking for a school that promotes the arts and trade's like the Waldorf school did. I went to the Waldorf school from grades 6-12 and it has served me well in my career as an electrician.
- Outside time, challenging academics, music, art, STEAM, relationship building tools, care for individuality, diversity

Applicant responses regarding the next two questions have directly influenced the scope of our charter application. Results show that there is overwhelming support for a K-12 Public Waldorf Charter School in Santa Fe. A majority of respondents desire that SMCS start by offering the early grades first and build up from there. However, respondents also expressed that there is a strong need for more middle school options in Santa Fe.

Figure 59 - (Pie Chart) What grades should the charter school serve?

Figure 7 - What grades should the charter school serve?

115 Responses

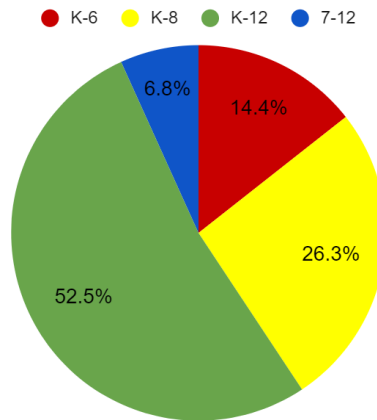
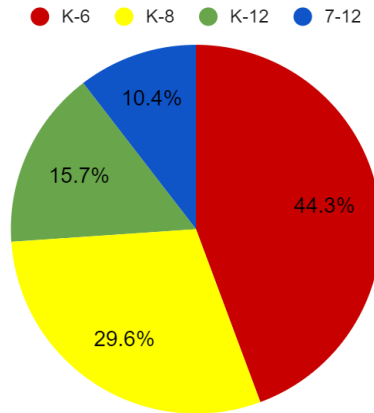


Figure 60 - (Pie Chart) What grade or grades do you think are most important for a new charter school to serve in its first term (first 5 years)?

Figure 8 - What grade or grades do you think are most important for a new charter school to serve in its first term (first 5 years)?

115 Responses



Community Outreach Booths & Meetings

In SMCS's efforts to have our school demographics reflect the demographics of the community it serves, we made specific efforts to reach out to Hispanic communities. Our efforts are outlined below:

- We held an informational booth at the Southside Library, following the Bilingual Books & Babies class on April 27th, 2024
- We held an informational booth at the Genoveva Chavez Community Center on May 4th, 2024
- We widely distributed fliers for an informational meeting about Waldorf education and our charter school application in Spanish along children-focused businesses on Airport Rd.
- We hosted an informational meeting about Waldorf education and our charter school application in Spanish at the Southside Library on May 11th, 2024
- We held an informational booth at the Santa Fe Farmers Market on May 18th, 2024. At this booth, we had a sign in sheet for interested community members and families.

Figure 61 - Outreach table at Santa Fe Farmers Market sign-in sheet, May 18, 2024

Outreach Table at Santa Fe Farmers Market; Sign In Sheet, 5/18/2024	
Name	Stakeholder Category
Elisabeth Rimann	Community Member
Julia Rhodes	Community Member
Sage Graham	Community Member
Pam Crouse	Community Member
Lucie Pastoriza	Community Member

R. Paryol	Community Member
Jesse Lemfielder	Community Member
Jessica Callaway	Community Member
Stefan Lark	Community Member
John McGuire	Community Member
Stefan Vest	Community Member
Hanna Forssenius	Community Member
Shelby Sanchez	Community Member
Leah George	Community Member
Michael O'Neill	Community Member
Haley Burke	Community Member
Randle Charles	Community Member
Meghan Machado	Community Member
Gulce Kardes	Community Member
Sylvia Castaneda	Community Member
Georgina McKee	Community Member

Festival Life & Pedagogical Studies

Community festivals are a part of every Waldorf community so that even after the Santa Fe Waldorf School closed, our festivals and traditions continued. We celebrated our Winter Spiral on December 10th, 2023. This event was attended by 75 people.

Founding members of the charter committee were a part of the Waldorf Community Council that hosted a May Faire celebration on May 5th, 2024. The event was attended by 110 people.

Two teachers also came together to train for and travel with 7 students and their families to the 5th grade Pentathlon Games at the Denver Waldorf School. This is a 5th grade tradition that meets on the grounds of a regional Waldorf school . The hosts rotate and there are currently 8 schools in our region that participate between Colorado, Arizona, and New Mexico, including two other Colorado-based Waldorf inspired charters. In the shared school event, the students participate in the five competitions of the original Olympic games, during the year the 5th graders learn Greek history. Students are teamed with students from other grades as they test their skills in speed and strength, followed by feasting together.

The founding board of the Santa Fe Waldorf School held a weekly study of one of the many foundational books describing the Waldorf pedagogy. Six members of the community met weekly for 14 weeks to study and better understand the philosophy behind the Waldorf methods.

Web-Based Presence

SMCS has established social media accounts, co-founder professional email addresses, and is in the process of adapting the former Santa Fe Waldorf School website for the charter initiative. This online presence has allowed for expanded community access to information about Waldorf's proposed charter model and our community outreach work, including our community festivals. Direct contact information is also provided through each of these platforms, which resulted in several inquiries for meetings to learn more about the charter movement.

These platforms allowed our team to share relevant updates related to our community outreach, charter application status, location, lottery, and enrollment, if authorized. If authorized, these platforms will also allow us to build interest in our model and share news about community partnerships as they become official, particularly with younger families with children who could potentially seek enrollment at SMCS.

Links to each web-based presence are listed below.

- Instagram: <https://www.instagram.com/santafe.waldorfschool.art>
- Website: www.santafewaldorfschool.org

Charter School Name Vote

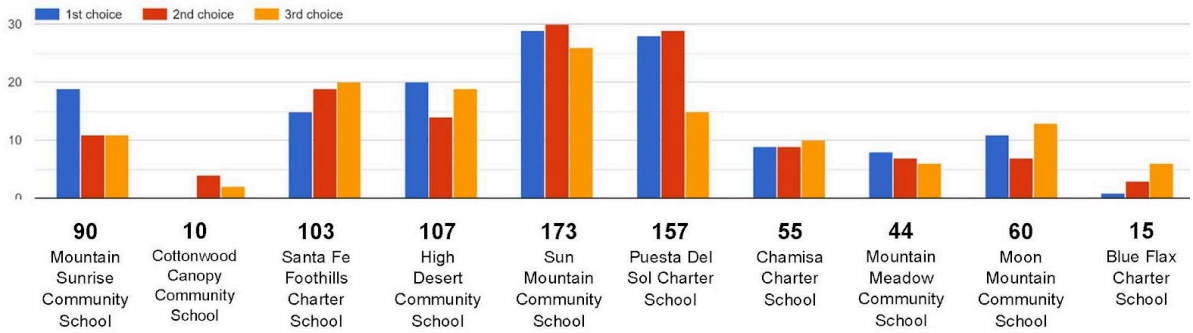
As part of our community outreach process, the founding team reached out to our community to name a proposed Charter School, using place-based names. Our request elicited an enthusiastic community response! Out of the names submitted, the founders narrowed the list down to ten, which were then put to a community vote. We used ranked choice voting to assign a score to each name option. Participants were requested to choose their top 3 choices - 1st choice received 3 points; 2nd choice received 2 points; 3rd choice received 1 point. Sun Mountain Community School emerged as the top choice of the community with the highest total points, the maximum number of first choice votes, and the maximum number of total votes. The results are displayed in the graph below.

Figure 62 - Graph for charter school name selection

CHARTER SCHOOL NAME RESULTS:

Ranked choice points system: 1st choice = 3; 2nd choice = 2; 3rd choice = 1

Please pick your TOP THREE school names in the order of 1st choice, 2nd choice and 3rd choice. Elija los TRES MEJORES nombres de escuelas en el orden de primera opción, segunda opción y tercera opción.



AUDIENCE REACHED

In order to reach a broad audience, the Founding Team of SMCS executed a thoughtful and strategic approach to community outreach. We engaged in a variety of community outreach activities described above, using diverse platforms and forums. All outreach information was available in Spanish and English. These methods ensured that our reach was broad so that we could better understand the needs and goals of different community members.

Our outreach methods allowed us to connect with educators, Santa Fe Waldorf School Alumni, non-profit/community organization leaders, business owners, government officials, and most importantly, parents and families. The chart, Figure 63, below provides a snapshot of the audiences reached across all outreach methods.

Figure 63 - Outreach activities and audience reached

Outreach Activity	Audience Reached
One-on-One Meetings: Community Organizations, Educators, and Businesses	Representatives from 17 local and national organizations
One-on-One Meetings: Alumni parents & graduates, and interested Community Members	60 Alumni parents, graduates and community members
1st Town hall	39 attendees
2nd Town hall	14 attendees
3rd Town hall	33 attendees
Community Survey	113 respondents
Teacher’s Survey	9 respondents

Bilingual Books and Babies, Southside Library	Over 20 one-on-one conversations
Genoveva Chavez Community Center Outreach Table	Over 40 one-on-one conversations
Que es una Escuela de Waldorf?, Southside Library	Estimated 25 community members spoken to.
Santa Fe Farmers Market Outreach Table	21 names placed on sign up sheet for future emails, over 100 one-on-one conversations
Name our school voting survey	140 responses
Email updates from the Charter Committee	Audience of 900+

B. Community Support

B. Provide **sufficient measurable**, quantifiable, and **qualitative** data-based evidence of abundant, broad-based support for the proposed school among residents in the targeted community. **DO NOT provide names or specific letters of interest from families or students.**

SMCS is committed to meeting the needs of its community. Founding members and the school culture values input and feedback from our stakeholders. Our outreach program activities have allowed the Charter Initiative team to interact with hundreds of members of our community. We have sought input from individuals and organizations across our city, with a particular focus on the 87507, 87505, and 87508 zip codes, our target zip codes. When appropriate, we have also sought input from regional, state-wide, and national organizations. Our outreach activities have shown us that there is a strong desire to see Waldorf education, K-8, live on in this community as a public entity. Our community is seeking the whole child approach in education, with an arts and outdoors integrated curriculum that Waldorf pedagogy provides. Our outreach program is explained in detail in Section IV. A. (1), and consisted of a variety of emails, one-on-one meetings, Town Hall meetings, school input survey completion, continuing our long tradition of festival life, Hispanic community outreach booths and meeting, and creating a web-based presence. These activities have allowed us to develop a broad base of support for SMCS. The sections below outline the evidence of support we have collected from each activity, both qualitatively and quantitatively.

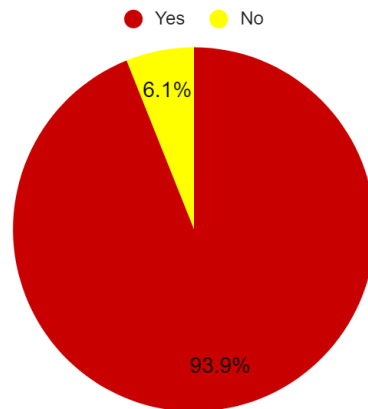
EVIDENCE OF COMMUNITY SUPPORT

Community Survey Results

Figure 64 - (Pie chart) Survey comments regarding tuition-free Waldorf option

Figure 4 - Would you send your child to a tuition-free public Waldorf charter school?

115 Responses



When asked why or why not, some of the 115 responses were as followed (verbatim):

- Absolutely!! I like the diversity this model would facilitate in the community, and the value would be immeasurable to us as a family
- because the tuition free model of public school is very ideal for us, mixed with the Waldorf pedagogy would be our ideal setting
- I do not know a better option for younger students.
- This is a perfect fit for us! It's free, it's Waldorf, and we would absolutely do this.
- I love Waldorf's approach to education and if it were free, I'm all in
- I want Waldorf education for my son
- As long as the quality of education is high and fits within as much of the Waldorf philosophy as possible, I would consider it.
- It would be extremely helpful not to have to worry about tuition due to our family's fluctuating income.
- Any Waldorf based education is what we seek
- I can't afford private school fees but Waldorf really is the best possible educational model
- There are no other choices
- Absolutely, because that's a dream come true. The quality of a Waldorf education should be available to all children.
- Affordable, but just as powerful, better funded, more support services, more diverse . . . I would love a public school!
- Less out-of-pocket money output is better.
- Affordable, accessible, diverse
- I like the philosophy, less invasive tech, more humanistic
- We would prefer a public charter option rather than private school
- Yes, particularly if I felt that the leadership had a really clear plan for how to integrate state educational requirements with the Waldorf curriculum and worldview.
- A free public charter waldorf school would allow our family to live with less stress and more time with our children.
- No question, if it's based on anthroposophical principles.
- Possibly, it makes it more equitable and HOPEFULLY more diverse
- I think it would be great for parents who cannot afford it
- This would greatly assist our family if 6 (with 4 special needs children ages 16-26)

- It gives alternative opportunities to children who learn differently. It has great value in the social emotional learning with a community aspect.
- I would love to have the Waldorf education available to all income levels!

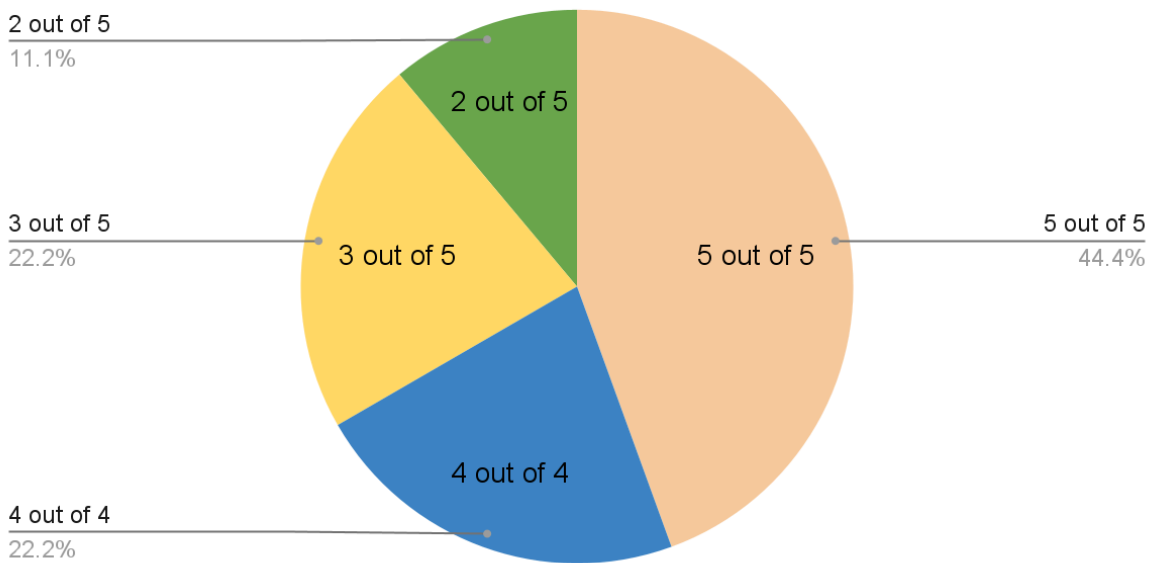
Evidence of Teacher Support

Teacher Survey

To get an understanding of our community’s Waldorf teachers and their perception of a Waldorf-inspired public charter, we specifically surveyed teachers from the former Santa Fe Waldorf School. We asked them what they thought the private school did very well and what they thought we needed improvement in. This was particularly valuable as some teachers had gone on to teach in public schools.

Figure 65 - (Pie charts) Survey results of former Santa Fe Waldorf School teachers.

How willing would you be to teach at a Waldorf-inspired charter school, 1-5 (1 being "not at all" & 5 being "ready immediately")



When asked, “What did the Santa Fe Waldorf School do well?”, teachers’ responses included (verbatim):

- The approach to math and language sprouted first out of story, giving children a context from which concepts emerged. Finding math in nature and creating artistic renderings from mathematical concepts gave it meaning.
- The approach to reading came from a whole to parts model that gave students a rich experience of story and verse before being broken down into mechanics.
- The school carried an outdoor education program throughout, bringing the students out into the wilderness through grade appropriate experiences including overnight camping. Through these experiences as well as through regular recitation of poetry and telling of stories, it was a goal of the teachers to cultivate a feeling of reverence and awe among the students.
- School wide festivals cultivated a feeling of wholeness and community among students.
- Because the teacher would move with the students up through the grades, there was a capacity for deep relationships between student and teacher to develop. Students were emotionally held in their learning community.

- A profoundly deep foundation for future learning was established in the early childhood years, with a rich pre-academic foundation and life-long learning habits!
- We tended to their emotional needs. We kept education alive for them so they loved school and learning.

When asked, “What were the weaknesses of our school, or how did we fail our students?” (verbatim)

- Leadership and collaboration were weak- thus impacting the school’s ability to grow.
- Salaries were significantly low.
- Did not 'right size' expenses when enrollment decreased- needed earlier intervention in the areas of development/ enrollment and retention.
- A weakness was not to create a strong and impartial administrative entity that filters all information without bias and supports all members of the community unconditionally.
- We could not afford student support services.
- We were providing stellar education but lacked a system of school-wide benchmarks to sustain academic rigor

Each of these issues had ultimately caused us to grow, and to create pathways towards improvement - all are addressed in this application process. The reflections following the closure of the Santa Fe Waldorf School, and this Public Charter School application process has given the Founding Team the time and guidance to update our model, shift our outreach, and plan for greater support for the quickly changing student needs. We aim to implement all these improvements while holding onto the arts and outdoors integrated curriculum and the whole child approach that has caused so many students, teachers, and community members to fall in love with and dedicate their lives to this pedagogy.

Additional Evidence of Support

Sustained community support was evident in Town Hall participation from a diverse group of constituents, through letters of support, participation in festival life and in response to our social media announcements. Across our Three Town halls and our one Spanish language informational meeting, some 300 individuals participated in the opportunity to learn more about our charter application efforts. To date, the SMCS Founding Team has received multiple letters of support from community members, parents and families with school aged children, stalwart educators, and non-profit organizations. These letters of support are included in Attachment 31, while a select few have been included later in this application.

See Attachment 31 - Letters of Support

SMCS outreach program has allowed us to build meaningful relationships with a broad audience of families, community members, educators, and organization leaders. Our outreach program as a whole has allowed us to calibrate our efforts to the expressed community needs, attend to details with a growing and greater degree of awareness and responsiveness, hear out concerns and questions, seeks answers and solutions, and build a groundswell momentum of support for SMCS that is evidenced both quantitatively and qualitatively.

The interest in the community, and the support of this Charter School initiative documented above show that our effort to establish and publically funded Waldorf-inspired charter school are timely, valued and much needed. This community, which has supported a Waldorf education movement for 40 years, understands the tremendous benefits of blending with the public school system in a charter model. They look forward to this new model and we look forward to sharing it broadly across the community.

We are eager to continue our community outreach work throughout the summer and during our implementation year if authorized. We know that in order to achieve our mission goals of teaching to the whole child and to the whole community, we will need to grow and evolve our outreach programming to cultivate our relationship, ensure that community needs are understood and met, not only in the charter application and the founding, but also in the evolution of the school once we are established.

Letters of Support

Excerpts from a select number of letters of support the Founding Team has received are reproduced here. Please refer to **Attachment 31 - Letters of Support** for community and alumni letters of support for Sun Mountain Community School.

From Rayna Dineen, Executive Director of Reading Quest:



May 22, 2024

To Whom It May Concern,

I am writing to express my enthusiastic support for a tuition-free Waldorf Charter School in Santa Fe, New Mexico. I have been working in education for the past 40 years with 33 of those years in Santa Fe. I have seen first-hand the need for charter schools in New Mexico. I am an advocate for innovative and holistic educational approaches, and I believe that Waldorf education offers a unique and invaluable contribution to the diversity and quality of our local educational options.

When I founded Santa Fe School for the Arts & Sciences in 2000, we incorporated elements of Waldorf pedagogy into the curriculum because of its focus on fostering creativity, critical thinking and respect for nature. The way Waldorf education integrates academic, artistic and practical disciplines nurtures the intellectual, emotional and physical development of each child. I have also seen first-hand how supportive Waldorf education can be for newly arrived refugees and immigrants. The way Waldorf schools prepare students for academic success, also gives them the tools they need to become thoughtful, engaged and compassionate members of society. I have always been impressed with the quality of classes offered at Waldorf schools and the attention to detail in handwriting, the arts and hands on projects.

I have also appreciated Waldorf School's emphasis on community involvement and environmental stewardship which can instill a strong sense of social and ecological responsibility in students. By engaging with the broader community and participating in activities that promote sustainability and social justice, students learn the importance of contributing to the well-being of society and the environment.

From Dina Jansen, Parent of a SFWS Alumnus:

“We are writing to support a tuition-free Waldorf Charter School for the Santa Fe Community. Our daughter, Deedee Jansen (Class of '21), attended Waldorf only because she received the Renaissance Scholarship, which covered her full tuition. The Waldorf education, which we would have been unable to access without this scholarship, was a game-changer for our daughter.

Our daughter, identified as dyslexic, thrived at Santa Fe Waldorf due to its rigorous academics, beautiful outdoor education program, and many extracurricular activities (she enjoyed working on the literary magazine, participating in the thriving track and field team, being a part of the yearbook staff, and being president of the Student Council.) Ironically, Deedee initially did not want to attend Waldorf but instead wanted to attend a public school. As a "compromise," we stated she would attend SF Waldorf for one year, and after that year, we could revisit the idea of a public school. After one year, she was utterly hooked and saw the benefits of a Waldorf Education.

While at Waldorf, Deedee connected with her instructors and the unique ways they presented the material. She was not a natural artist, but art (visual and performing) was a central part of her education and assisted her in understanding very complex ideas and issues. Last week, our daughter, a junior at Austin College in Sherman, Texas, won a Nelson Award for her artwork. Her education at Waldorf certainly contributed to her desire to take art classes in college.

That said, Deedee is majoring in physics (with minors in math and theater). This year, she has won prestigious university awards in all three fields. Although my daughter has worked hard to achieve excellence in these areas, her Waldorf education played a large role in giving her a solid base on which to build. She had top-notch teachers who taught her to stretch herself, fail forward, advocate for herself, and, most importantly, be interested in the world. It is wonderful that she was given the Renaissance Scholarship as she continues to embody the ideas of being a Renaissance person.”

From Keifer Nace, SFWS Alumnus, Geologist with Forest Service, OR:

“I attended middle school and high school at the Santa Fe Waldorf School, graduating in 2015. My Waldorf education has had an immensely positive impact on my life through to today—graduating from Whitman College with a bachelor’s degree in environmental studies and geology, joining the Peace Corps as an environmental education volunteer, and now working as a geologist for the Forest Service in Eastern Oregon. I truly believe I would not be the same person I am today had I not attended Waldorf. Waldorf taught me how to be curious and it made me unafraid to try new and difficult things. Being challenged to create main lesson books, to carve wooden stools, to sew dolls, to read Faust or Walden, to write poetry, to play the saxophone, to backpack in the desert wilderness, and to complete a senior project, exposed me to so many different ways of thinking and moving in this world, which are invaluable to my life today. Because of the vast amount of subjects I was exposed to during my time at Waldorf as well as the hands-on learning approach, I grew to love learning and have always leaned into interdisciplinary subjects. I still turn to the skills I gained in writing my own textbooks (main lesson books) to write reports for work; I think back to lessons in history and literature that help me understand our current state of the world; I use the wilderness skills I gained on camping trips during my weekends in the Blue Mountains, and I use the sewing

lessons I had to mend my own clothes. The greatest skills Waldorf taught me that I use every day in my job and my life are critical and creative thinking, communication, problem solving, concise and thorough writing, and how to be curious and open minded.

I think every child should have the opportunity to learn and grow through a Waldorf education. I had the great privilege of attending Waldorf because I had parents who worked immensely hard to obtain the resources to send me to the private Waldorf School. I am incredibly supportive of a Waldorf charter school because I believe all demographics should be able to have the same fantastic education as I was able to receive.”

From Rose Moon, SFWS Alumnus, Industrial Designer:

“My education at the Santa Fe Waldorf School prepared me for life by giving me a well-rounded childhood. Santa Fe Waldorf nourished my mind, body, and soul through their unique curriculum, familiarizing me with music, movement, sculpture, design, and nature at a young age. I found my strength through their athletic programs, which paved my way to Pratt Institute. There, I played volleyball as the captain and MVP for four years while the woodworking, hand working, sculpting, and color theory I had been taught helped me graduate from Pratt summa cum laude with a Bachelor of Industrial Design. Reflecting on my elementary and secondary education, it’s hard to pinpoint all the ways it’s formed my brain and path today, but I feel particularly grateful for the variety within the Waldorf education. Due to this, as an adult, I am an accomplished designer, athlete, and cellist.”

C. Community Relationships

C. Clearly demonstrate that you have developed **meaningful and strategic** networking relationships or resource agreements with local community agencies, groups, or individuals. (not including formal partnership agreements that are integral to the proposed school’s operations, as described in Section II. I (1) of this application.)

SMCS is committed to upholding our mission of educating the whole human being and to do this, we made a conscientious effort to connect with area businesses, non-profits, former Santa Fe Waldorf School community of parents and graduates, and all community members to seek those whose goals and values are aligned with SMCS. Our Charter Outreach team has received strong support for a Waldorf-inspired charter school. This positive feedback from a wide variety of community members demonstrates that Waldorf Education is well known in our community through the 40-year long efforts of the former Santa Fe Waldorf School, and is widely supported as a valuable pedagogical approach. The SMCS is excited for the potential of working with key organizations in the Santa Fe community to enrich our programming, expand our outreach, share our excellence where it exists, and cultivate a climate of collaboration in our shared efforts for great educational opportunities for Santa Fe children.

Below is the list of community organizations that have articulated their support towards our Charter School initiative:

Children’s Adventure Company. With their main focus on offering age-appropriate outdoor field trips, Children’s Adventure Company (CAC) has become Santa Fe's most active and enriched summer camp and after-school program for children in Kindergarten through 7th grade. In our One-on-One meeting, CAC was supportive of a Waldorf Charter option and agreed to help support us with our student

recruitment by sharing our lottery and enrollment information with brochures and flyers on their campus.

Climates Advocates Voces Unidas. Climates Advocates Voces Unidas (CAVU) seeks to empower students with confidence as they navigate their educational and career paths in a world facing climate challenges through connecting children and communities to tangible solutions. The Climate Innovation Challenge (CIC) is their free international STEAM program for grades 3-12 that guides students through the creation of climate change solutions while developing storytelling and video production skills. In our One-on-One meeting, CAVU is excited to include a Waldorf Charter School into the CIC program which would engage our students into the STEAM fields and creatively look at tackling climate change.

Dragonfly Art Studio. Dragonfly Art Studio is a unique place designed to teach the fundamentals of art for children and adults to explore a range of materials, mediums, and techniques, learn new skills, and discover their creativity. Dragonfly Art Studio brings imaginative class themes that enrich children and adults' learning experiences and encourages everyone to express themselves artistically and individually. Several former students and assistants have gone through various summer camps and after school programs over the years and SMCS would like to continue that connection. Dragonfly Art Studio is supportive of a Waldorf Charter School option for families of Santa Fe and enrollment information with brochures and flyers on their campus.

Many Mothers. Many Mothers contribute to the health and well-being of communities by providing physical, emotional, and practical support to any family following the birth or adoption of a new baby. Many Mothers met with SMCS through a one-on-one meeting and were supportive of a Waldorf Charter School option for young families of Santa Fe. They are also supportive in sharing our lottery and enrollment information with brochures and flyers and open to the possibility of presenting SMCS through a presentation to their community.

Randall Davey Audubon Center and Sanctuary. On the National Register of Historic Places, the Randall Davey Audubon Center and Sanctuary engages thousands of people and introduces them to a world of history and nature, helping them to better appreciate their role and responsibility within it. Audubon New Mexico's environmental education programs offer hands-on, nature based activities that will bring science curriculum to life. In our One-on-One meeting, there was interest in the Waldorf Charter School collaborating with the education department at the Randall Davey Audubon Center and Sanctuary, deepening SMCS's commitment to a rich and diverse outdoor program. They also have agreed to help support us with our student recruitment by sharing our lottery and enrollment information with brochures and flyers on their campus.

Reading Quest. Reading Quest believes learning how to read well is a human right and that closing the education gap between low and high income students is a powerful tool in combating inequality and poverty. Reading Quest provides free, structured literacy tutoring and social emotional support for hundreds of striving readers. In our One-on-One meeting, Reading Quest executive director Rayna Dineen demonstrated support of a Waldorf Charter School option, and also reached out with supporting our faculty and staff with teaching them the Science of Reading in professional development courses.

Santa Fe Girls School. The Santa Fe Girls' School was founded as a middle school where adolescent girls could develop intellectual, academic and emotional strength in a supportive and cooperative learning environment. The Santa Fe Girls School is supportive of the Charter option in SMCS.

Santa Fe Preparatory School. A stalwart education institution in Santa Fe for 63 years, Santa Fe Prep is an independent college preparatory school serving students from grades 7 to 12. Guided by the core values of courage, curiosity, respect, resilience, and integrity, Santa Fe Prep engages students in active discourse in preparation for lives of uncommon purpose. The SMCS team reached out for a one-on-one meeting with their Head of School, Aaron Schubach. He was curious and insightful about Waldorf education and sees the value of having a Waldorf Charter Education option in the greater Santa Fe community.

Thrive Community School. THRIVE Community School is a diverse and affirming K-8 learning community that embraces social and emotional learning practices and utilizes evidence-based teaching to advance educational equity. They use innovative approaches to drive academic achievement, eliminate disparities in student outcomes, and reinforce a positive self-concept so that all students are positioned to follow paths of their choice. Thrive’s Co-Founder & Director, Sean Duncan, has met with SMCS in a One-on-one meeting and has expressed support of a Waldorf Charter School option. In addition, SMCS and Thrive will explore opportunities to discuss ways in which contracted bus services can be shared across schools to lower costs and increase efficiency.

V. Applicant Remarks

Additional Remarks: The applicant team is invited to provide additional remarks, not to exceed 500 words. This section will not be rated by the Peer Review Team.

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VI. Appendices and Attachments

	Appendix Description	File Naming Convention	Attached (Check if Yes)
A	II-A1 Governing Body Bylaws	A SMCS Bylaws	X
B	II-C3 Head Administrator Job Description	B SMCS Head Admin	X
C	II-D2 Job Descriptions for Certified, Licensed, and Other Key Staff	C SMCS Descriptions	X
D	II-I2 Proposed Agreements Governing Third Party Relationships and Memoranda of Understandings (MOUs) (*Required if applicable*)	D SMCS MOUs	<input type="checkbox"/>
E	II-L1 PSFA-Approved Projected Facility Plan Documentation	E SMCS Facility Plan	X
F	III-B1 Five Years of 910B5 State Equalization Guarantee (SEG) Computation Revenue Estimate Worksheets	F SMCS 910B5	X
G	III-B2 Five-year Budget Plan	G SMCS Budget Plan	X

H	III-C1 Internal Control Procedures	H SMCS Internal Control	X
I	List of Figures	I SMCS List of Figures	X
	Attachment Description	Referenced in Section	
0	Glossary Of Terms	Executive Summary	
1	SFWS Graduates & College Placement Success	I.A.(2)	
2	Yearly Curriculum Themes K-8th Grade	I.C	
3	Waldorf-inspired Kindergarten Educational Program	I.C	
4	Language Arts Academic Standards	I.C	
5	SMCS Math Educational Program - 1st-8th Grade	I.C	
6	SMCS Nature Studies & Science Educational Program	I.C	
7	Organization of Science Blocks	I.C	
8	Specialty Subject Educational Program	I.C	
9	SMCS Outdoor Education Handbook Scope & Sequence 1st-8th Grade	I.C	
10	Common Core Standards Table - Kindergarten	I.C	
11	NM Social Studies Standards Table 1st - 8th Grade	I.C	
12	Public Waldorf/Common Core Comparison Chart	I.C	
13	Science Core Curriculum Placement Charts	I.C	
14	2025-2026 School Yearly Calendar	I.F.(2)	
15	2026-2027 School Calendar	I.F.(2)	
16	Weekly Schedule (Grades 1-8) (subject to change)	I.F.(2)	
17	Partial Day Schedule (Grades 1-8) (subject to change)	I.F.(2)	
18	Example of a Block Rotation	I.F.(2)	
19	Primary Home Language Survey	I.G.(2a)	
20	Block Report Example	I.H.(1)	
21	Grade Specific Assessment Rubrics	I.H.(1)	
22	Sample School Board Meeting Agenda	II.C.(1)	
23	HOUSSE Form A	II.C.(4)	
24	Salary Schedules	II.E	
25	School Personnel Handbook	II.E	
26	Conflict Of Interest Policy	II.H	

27	Outreach Email Template	IV.A	
28	Educational Options K-12 Bilingual Survey	IV.A	
29	Charter School Name Vote	IV.A	
30	6 Reasons to Consider a Charter	IV.A	
31	Letters of Support	IV.B	