

Equip Academy Responses to Peer Review Team Report

Updated upon request 7.08.24

The Equip Academy team has conducted a thorough review of the independent review team's preliminary analysis. We were pleased to note the positive response to our mission, vision, and unique and innovative approaches that are integral to our school design.

The comments on several elements of the application seemed to reflect misunderstandings and/or inadvertent oversights on the part of the reviewers and, in some instances, factual errors.

We have provided responses to each of those items to ensure clarity and accuracy. We have also provided clarification on items that we believe provide further clarity.

We have color-coded our responses according to the key below and would appreciate your assistance in making appropriate corrections and updates to the report and ratings.

RESPONSE KEY:

Factual error or misunderstanding - Please consider the response provided to correct the report and update the rating.

Clarification - Please consider the response provided to clarify the report and update the rating as appropriate.

We identified and responded to a total of **97 factual errors or misunderstandings** in the review report. In addition, we have provided **clarification** for **55** items.

Peer Review Team Report: Equip Academy

A.(1)	Mission	Meets
A.(2)	Vision	Meets
A.(3)	Uniqueness and Innovation	Meets
B.	Mission Specific Goals	Approaches
C.	Curriculum, Educational Program, Student Performance Standards	Approaches
D.(1)	Bilingual Multicultural Education, Indian Education, Hispanic Education and Black Education	Approaches
D.(2)	Equity Plan	Approaches
E.	Graduation Requirements	N/A
F.(1)	Instruction Philosophy	Meets
F.(2)	Yearly Calendar and Daily Schedule	Does not meet
F.(3)	Schedule Narrative	Does not meet
G.(1a)	Special Education: Students with IEPs	Does not meet
G.(1b)	Special Education: Progress Monitoring	Approaches
G.(2a)	English Learners: Curriculum & Instruction	Approaches
G.(2b)	English Learners: Progress Monitoring	Approaches
G.(3)	ESSA and Special Population Needs	Approaches
H.(1)	Assessment Plan	Approaches
H.(2)	Assessment Data Analysis	Approaches
H.(3)	Achievement Communication Plan	Approaches
A.(1)	Governance Structure	Approaches
A.(2)	Governing Board Qualifications	Approaches
A.(3)	Governing Board Recruitment	Approaches
B.(1)	Annual Board Training Plan	Meets
B.(2)	Annual Board Self-Evaluation	Meets
C.(1)	Board Oversight Monitoring Plan	Approaches
C.(2)	Hiring Head Administrator	Meets
C.(3)	Governing Board Roles & Responsibilities	Approaches

C.(4)	Annual Head Evaluation	Approaches
D.(1)	Organizational Chart and Narrative	Approaches
D.(2)	Job Descriptions	Does not meet
D.(3)	Staffing Plan	Does not meet
D.(4)	Professional Development Plan	Approaches
E.	Conditions of Employment	Approaches
F.(1)	Meaningful Community Involvement in Governance	Meets
F.(2)	Complaint Process	Approaches
G.(1)	Student Outreach & Recruitment	Approaches
G.(2)	Lottery Process	Approaches
G.(3)	Conflict of Interest Policy	Approaches
I.(1)	Third Party Relationship	N/A
Appendix D	If I.(1) then Appendix D	Approaches
J.(1)	Transportation	Approaches
j.(2)	Food Services	Meets
k.(1)	Facilities Master Plan	Meets
k.(2)	Evidence of Researched Facility	Meets
A.	Projected Enrollment	Does not meet
Appendix F	910B5	Does not meet
Appendix G	5 Year Budget Plan	Does not meet
B.(3)	Budget Narrative	Approaches
B.(4)	Budget Adjustments	Approaches
C.(1)	Internal Control Procedures	Approaches
C.(2)	Appropriate Financial Staff	Approaches
A.	Evidence of Support/Outreach Activities	Approaches
B.	Community Support	Approaches
C.	Community Relationships	Meets

Evaluation Rubric for Part C: Application

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

ACADEMIC FRAMEWORK ANALYSIS
<p>The founding team of the proposed Equip Academy of New Mexico presents an Academic Framework that begins with a clear mission statement:</p> <p style="text-align: center; padding-left: 40px;">By providing a top-tier, inquiry-based, college-preparatory education, Equip Academy of New Mexico ensures K-5 students master the knowledge and skills to dream audaciously, engage deeply and pursue a life of purpose.</p> <p>Equip Academy of New Mexico is dedicated to serving students from the Westside of Albuquerque, which encompasses neighborhoods west of the Rio Grande and south of Paseo.</p> <p>The proposed school's mission, uniqueness and innovation, and teaching and instructional philosophy are clearly described. Some additional detail is required to fully address Equity Council requirements.</p>

Significant concerns included the yearly calendar, effective instruction for the student population, and instructional services and support for students with IEPs, all of which were rated as Does Not Meet.

Equip Academy's Academic Framework Meets the expectations for 3 of 17 indicators, Approaches the expectations for 11 of 17 Indicators and Does Not Meet for 3 of 17 rated Indicators.

ORGANIZATIONAL FRAMEWORK ANALYSIS

The Organizational Framework section includes significant concerns and inaccuracies regarding the audit committee, governing body bylaws, organizational and financial monitoring, job descriptions, and salaries.

Because of the significant number of tasks assigned to the Head Administrator, concern has been expressed by the independent review team that the success of the proposed school in the first two years of operation is solely dependent on the Head Administrator's ability to meet all requirements.

Equip Academy's Organizational Framework Meets the expectations for 6 of 23 indicators, Approaches the expectations for 15 of 23 Indicators and Does Not Meet for 2 of 23 rated Indicators.

FINANCIAL FRAMEWORK ANALYSIS

Numerous concerns are noted within the proposed Financial Framework section. A sample of concerns include: The 910B5 is not in alignment with proposed enrollment; In all but year 1, the expenditures exceed revenue; The school has included funding for the K-12 Program in the SEG, but has not identified K-12 Program days in the calendar (could have significant impact on the budget); Not all of the positions in the narrative were included in the budget; and, not all salaries budgeted align with the salary schedule.

Equip Academy's Financial Framework Meets the expectations for 2 of 11 indicators, Approaches the expectations for 6 of 11 Indicators and Does Not Meet for 3 of 11 rated Indicators.

OVERALL ANALYSIS

The application for Equip Academy of New Mexico Approaches expectations. Of 51 indicators, 11 are rated as Meets, 32 are rated as Approaches, and 8 are rated as Does Not Meet.

There is a good foundation for a charter school within this application. However, more work needs to be done within all three frameworks before the proposed school would be viable.

Overall, the current Application is not strong enough to serve as a cohesive and comprehensive plan for implementation of a new charter school.

I. Academic Framework

A. Mission and Vision

A. (1)	<u>MISSION</u>
Rating	Expectations
Meets	<p>A complete response must</p> <ul style="list-style-type: none"> • Identify how the proposed school will achieve its mission. • Discuss the importance of the mission to your proposed community • Be clear, concise, innovative, and measurable • Discuss what mission success will look like

The Equip Academy of New Mexico founding team’s response Meets the expectations for this section.

A.(2)	<u>VISION STATEMENT</u>
Rating	This narrative will be rated for completion, not content
Complete	<p>A complete response must describe</p> <ul style="list-style-type: none"> • The team’s reasoning and purpose • Why your team is committed to providing a public education platform for your proposed community • How your team intends to interact with your proposed community in order to provide their children with better academic outcomes • What about your proposed program serves the proposed community in unique and innovative ways?

The Equip Academy of New Mexico founding team’s response is Complete.

A. (3)	<u>UNIQUENESS AND INNOVATION</u>
Rating	Expectations

Meets	<p>A complete response must</p> <ul style="list-style-type: none"> ● Describe the uniqueness, innovation, and significant contribution of your educational program to the local NM public education environment; ● Describe the needs of the community; and ● Demonstrate how the applicant team knows there is a compelling demand for the proposed school’s educational program in the geographic area in which the school plans to locate. ● Ensure that the evidence establishes a compelling demand for the proposed school’s educational program based on reliable research, effective practices, or demonstrated success in schools with diverse characteristics.
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The Equip Academy of New Mexico founding team’s response Meets the expectations for this section.

B. Mission-Specific Goals

B.	<u>Mission-Specific Goals</u>
Rating	Expectations
Approaches	<p>A complete response must</p> <ul style="list-style-type: none"> ● Include two mission-specific goals; ● Align to the student outcomes identified in the mission response (A.1.); ● Be guided by the elements of the SMART format: ● Include measures and metrics. ● Include how the board of the proposed school intends to regularly monitor equitable mission success

The Equip Academy of New Mexico founding team’s response Approaches the expectations for this section.

Two Mission-specific goals are presented that align with the mission, one focused on reading and one focused on math. The SMART format requires that the goals be “. . . specific, clearly and concisely stated, and easily understood.” The heart of the reading goal statement is clear (At least 70% of math goal students will advance 2 reading levels or more each academic year as measured by the Fountas & Pinnell Reading Assessment), while the remaining narrative included in the goal statement may be less clear for community members and others to understand.

The expectation for a complete response includes the provision of information about how the board intends to regularly monitor equitable mission success. Board monitoring is described for Goal 1, but not included in the narrative for Goal 2.

RESPONSE - Mission-Specific Goals Section

Clarification (pages 36-43)

We believe that our communication to the community will be clear, and we will break down our goals so that all stakeholders can understand them. For example, In order to ensure that all details are clear for community members to understand, we might provide the clarity below.

- **Reading Goal:** At least 70% of students will advance 2 reading levels or more each academic year as measured by the Fountas & Pinnell Reading Assessment.
- **Math Goal:** On average, at least 70% of students will solve complex, standards-based, grade-level Number Stories math problems accurately, and at least 80% of students will increase by a total of at least 3 points on their grade-level CGI math problem-solving rubric from the beginning to the end of each academic year, up to a total of 12 possible points of growth.

We have ensured that goals follow the SMART Format. Both goals are

- **Specific** (focused on reading and math improvement)
- **Measurable** (using Fountas & Pinnell)
- **Achievable** (based on historical data and realistic targets)
- **Relevant** (aligned with our mission to improve academic outcomes)
- **Time-bound** (measured annually).

To clarify, this section specifies Board Monitoring of progress towards both goals for Equitable Mission Success:

- The Board will implement a rigorous monitoring system for both goals. This will include quarterly reviews of student progress data, ensuring alignment with equity measures such as subgroup analysis for students from diverse backgrounds.
- The Board's Equity & Culture Council will oversee this process, ensuring regular updates and adjustments to strategies based on the data to promote equitable outcomes across all student groups.

C. Curriculum, Educational Program, Student Performance Standards

C.	<u>Curriculum, Educational Program, Student Performance Standards</u>
Rating	Expectations

Approaches	<p>A complete response must</p> <ul style="list-style-type: none"> ● Describe the proposed school’s curriculum <i>including research-based evidence that supports the effectiveness of the selected model and the target population</i>; ● Describe how the proposed school’s curriculum will meet the requirements of equity for all underserved populations. ● Identify information that demonstrates how the curriculum will align with the New Mexico Common Core State Standards (CCSS) and New Mexico Content Standards; ● Identify information that demonstrates how the curriculum will align with the proposed school’s mission; and ● Include a reasonable (as based on the professional judgment of experienced educators) timeline and plan for the development of the entire proposed curriculum—including scope and sequence, unit plans, daily lesson plans, project plans and rubrics, and unit and course assessments.
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The Equip Academy of New Mexico founding team’s response Approaches the expectations for this section.

The applicants provided a proposed curriculum, described how it aligns to the state standards and mission, and included a reasonable timeline for development of the entire curriculum, rubrics and assessments. Additional detail is needed, however, to show how the curriculum will meet the requirements of equity for all underserved populations. For example, how will “phonics” be modified to support students who speak only their home language and assist them to learn English structure?

RESPONSE – Curriculum Equity and Phonics (pages 45, 46, 48, 48-49, 103-106,

Factual error or misunderstanding

We respectfully want to indicate that there are several places in which our response to this section addresses curriculum equity, as we provide content that supports the success of all students, including those who are emerging bilinguals and students with special needs as well as historically under-served and under-performing student population and all subgroups.

For example, at the start of our response we state: “Equip Academy will provide a research-based curriculum, data-driven academic program, and inquiry-based instructional model specifically designed to accelerate the achievement of an historically under-served and under-performing student population and all subgroups, including English Learners (ELs), students with disabilities, Hispanic, Native American, and Black students. We will offer state-of-the art, evidence-based, nationally-normed, and vertically-aligned curriculum for English Language Arts (ELA) and Mathematics because we know that access to quality content is critical to student success.” (page 45)

Further, and throughout the response, we indicate that “Across all grade levels, we implement externally validated programs and resources that have withstood the test of time and delivered measurable results for similar communities of students.” (page 46) We further quote research that gets at how the curriculum will serve emerging bilingual students, for example: “SFA is aligned to The Science of Reading focus within New Mexico to help students master essential oral, decoding, and comprehension skills. According to The Science of Reading for Emergent Bilinguals in New Mexico,

“Structured Literacy addresses components of oral language including phonology, morphology, semantics, syntax, discourse, and pragmatics at every level of reading development. Pragmatic language includes the ability to use language for different purposes including understanding both the social and academic registers of the language and using language appropriately across many contexts.” (page 48)

In addition, we include the following within the application: “There has been extensive research on curricular resources that best support the success of *all* students. For example, schools who use Success for All are shown to have fewer students assigned to special education and fewer students who must repeat grades.¹ SFA is highly supportive for EL students as well. Studies have shown that EL-specific student needs are met and are successful in increasing their reading levels more than control schools not using SFA.” (pages 48-49)

Further in the application, FIGURE 54 - SOR Essential Component and SFA Alignment shows how the curriculum will meet the requirements of equity for all underserved students and shows how phonics is supportive for EL students. (pages 103-106) We are pleased to place that same Figure into this element as helpful.

Per the reviewer’s particular question regarding phonics, please note the following details as well:

Phonics and small group instruction will be provided in English. Students will have access to books that they can read at home with their families, selected and provided by the school, appropriate to the grade level, and written in their English but also written in their native language to increase overall fluency. Students will be grouped in small homogeneous groups of similar English language skill to reach the needs of all students, including non-English speaking students. For example, if an EL kindergartener student speak only their home language and is therefore working on developing their English language skills, they will be placed in an AA or A reading group to provide the needed supports for helping them to learn English structure, allowing them to work in a targeted and supportive way on foundational phonemic awareness, letter sound/identification, background knowledge, word-solving CVC skills and key vocabulary.

In addition, and informed by best practice for emerging ELs, we will adapt our phonics instruction in the following ways:

- provide additional practice on English phonemes that are not present in the student’s home language
- focus on differences between the student’s home language and English, with less attention given to elements that will transfer
- strategic seating - a monolingual Spanish speaking child with a bilingual/emerging bilingual child to sit with one another
- give opportunities for extra practice in reading words, sentences, and stories
- identify and clarify difficult words and passages
- consolidate knowledge of the text through the use of summaries
- find appropriate ways to use the native language

¹ [The Long-Term Effects and Cost-Effectiveness of Success for All.](#)

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

D(1).	Bilingual Multicultural, Indian, Hispanic and Black Education Acts
Rating	Expectations
<p>Approaches</p>	<p>A complete response must ensure equal education opportunities for students in New Mexico by:</p> <ul style="list-style-type: none"> ● Addressing the goals of the Bilingual Multicultural Education Act (NMSA §22-23-1) including: <ul style="list-style-type: none"> ○ providing students with opportunities to expand their conceptual and linguistic abilities and potentials in a successful and positive manner; ○ teaching students to appreciate the value and beauty of different languages and cultures; and ○ meeting state academic content standards and benchmarks in all subject areas. ● Addressing the goals of the Indian Education Act (NMSA §22-23A-1) including: <ul style="list-style-type: none"> ○ Ensuring equitable and culturally relevant learning environments and culturally relevant instructional materials for American Indian students ○ Providing for the study, development and implementation of educational systems that affect the educational success of American Indian students to close the achievement gap, increase graduation rates; ○ Encouraging and fostering parental involvement in the education of their children; and ○ Providing mechanisms to improve educational opportunities for Native American students for the purpose of closing the achievement gap, increasing graduation rates, and increasing postsecondary enrollment, retention, and completion. ● Addressing the purpose of the Hispanic Education Act (NMSA §22-23B-2), including: <ul style="list-style-type: none"> ○ Providing for the study, development and implementation of educational systems that affect the educational success of Hispanic students to close the achievement gap, increase graduation rates; ○ Encouraging and fostering parental involvement in the education of their children; and ○ Providing mechanisms to improve educational opportunities for Hispanic students for the purpose of closing the achievement gap, increasing graduation rates, and increasing postsecondary enrollment, retention, and completion. ○ initiate and organize an equity council composed of multiple school stakeholders with the intent to create more equitable learning opportunities for marginalized students. ● Address the purpose of the Black Education Act (HB 43), including: <ul style="list-style-type: none"> ○ Developing and including anti-racism policies ○ Developing curricula and instructional materials that recognize and teach black culture and anti-racism. Implementing anti-racism training for teachers and staff ○ Opportunities to explore one’s identity and societal systems that may impact their identity and future.

The Equip Academy of New Mexico founding team's response Approaches the expectations for this section.

An expectation for this section is to address an equity council. Although the applicants addressed the Equity Council in the following Section and throughout the application, they did not include information specifically regarding initiating and organizing an equity council composed of multiple school stakeholders with the intent to create more equitable learning opportunities for marginalized students in this Section.

The applicants' response acknowledged their intent to meet all requirements of the individual acts. However, the narrative focuses heavily on narrowing the achievement gap for all classified students and leaves many elements of the individual acts not fully addressed. Examples include instructional materials for American Indians, a plan for developing and including anti-racism policies, developing curricula and instructional materials that recognize and teach black culture, and opportunities to explore one's identity and societal systems that may impact their identity and future. The last two points are briefly touched on within the response to the next section

Although there are funds in the budget for student travel, no funds have been identified for staff travel to accompany the students. Additionally, the budget does not include any funds for bilingual education.

RESPONSE - Bilingual Multicultural, Indian, Hispanic and Black Education Acts

Clarification (page 63)

We appreciate that the review team recognized our detailed discussion and inclusion of the Equity Council throughout multiple sections of the application, including in D.(2) which specifies our initiation of the Council as well as in multiple other sections in which the work of the Equity Council will inform our school's program and community. We believe deeply in the importance of the Equity Council and its role in ensuring that we provide an equitable education for all students, as such multiple references indicate.

Specific to the concern stated here, we have provided additional details to this section to fully satisfy that criteria element for the review team.

Establishing a Culture & Equity Council

Within 90 days of operation, Equip Academy will initiate and organize an Equity Council composed of multiple school stakeholders, including teachers, board members, parents, school leaders, and in age-appropriate ways as a K-5 school, students.

We will conduct outreach to our teachers throughout the year to encourage teachers to consider taking a role on the Council. We will conduct outreach to our families using our website, newsletters, and family meetings to encourage families to consider taking on a role on the Council. In all outreach and communication, we will highlight that the work of the Council will be to create equitable learning opportunities for marginalized students and to regularly monitor and evaluate the effectiveness of these initiatives.

RESPONSE - Meeting All Components of the Bilingual Multicultural Education Act, Indian Education Act, Hispanic Education Act, and Black Education Act

Factual error or misunderstanding (pages 60-61, 65, 65-66, 61-66, 57, 58-62)

There are several places in our response where we indicate our full commitment to the elements of these acts. For example, we state, “ Combined with a cultural awareness and respect for the community – an understanding of the ‘broader context of the school system and the pedagogical practices employed are the real methods to dismantling achievement gaps’² - these approaches inform every aspect of our school design.” (pages 60-61)

We further state within the application that “Equip Academy will serve multi-lingual, culturally diverse students; our programming, curriculum, and community partnerships will create opportunities for students to learn about themselves and others. As a culturally responsive school, we will ensure that all students feel both psychologically and physically safe” (page 65) and we follow this assurance with several examples of how we will accomplish this.

Finally, within the section “Culturally Responsive Framework,” we detail additional ways that we will authentically live out the requirements of these acts. (pages 65-66)

Cumulatively (pages 61-66), our **Resource-Rich, Literacy-Rich Curriculum** with intentional culturally relevant instructional materials, along with our **Educator Excellence** programing, **Data-Driven** and **Inquiry-Based Approach** dynamically support the success of American Indian, Hispanic and Black students. These elements of our academic program have been selected and will be carefully implemented to close these achievement gaps, increase graduation rates for all subgroups of students, and increase postsecondary enrollment, retention, and ultimately, competition so that all students are prepared to live a life of purpose and live their full potential.

We would note that our plan includes the following measures to meet these goals comprehensively, and we would point out that these various details are embedded throughout the charter application, demonstrating the ways that we have truly embraced the mandate of these acts into our various educational components:

1. **Bilingual Multicultural Education Act (NMSA §22-23-1) Goals: (page 57, pages 58-63, pages 65-66))**
 - **Opportunities for Expansion of Conceptual and Linguistic Abilities and Potentials in a Successful and Positive Manner:** Our curriculum is designed to help students expand their conceptual and linguistic abilities daily language immersion and culturally relevant pedagogy. For example, starting in kindergarten, in writing, students will practice orally telling their story across 5 fingers and will then draw their story across five pages. They will practice retelling the story with all the details they add to their drawing prior to writing it. Our writing units are supported by our social studies units so students could be learning about fictional stories across cultures to support their understanding of fictional elements.
 - **Appreciation of the Value and Beauty of Different Languages and Cultures:** We will implement cultural appreciation programs, such as monthly cultural heritage celebrations and

² Milner, H. R. (2013). “Analyzing Poverty, Learning, and Teaching Through a Critical Race Theory Lens.” *Review of Research in Education*, 37(1), 1-53. <https://doi.org/10.3102/0091732X12459720>.

integration of multicultural literature in our reading lists, to help students appreciate the value and beauty of different languages and cultures.

- **Meeting State Academic Content Standards and Benchmarks in All Subject Areas:** Our curriculum is aligned with New Mexico state academic content standards and benchmarks across all subject areas. We will utilize formative and summative assessments which are similarly aligned to ensure students meet or exceed these standards. We will monitor student progress at the school level and at the Board level, disaggregating data by all identified subgroups to ensure progress and achievement within each group.
2. **Indian Education Act (NMSA §22-23A-1) Goals: (page 57, pages 58-63, pages 65-66)**
 - **Equitable and Culturally Relevant Learning Environments and Culturally Relevant Instructional Materials for American Indian students:** Equip Academy will provide culturally relevant instructional materials and create learning environments that respect and reflect American Indian cultures. This will include incorporating Native American history and perspectives into our social studies curriculum and collaborating with local tribes for cultural education programs as well as working with the Indian Pueblo Cultural Center (IPCC) to provide culturally relevant materials and experiences at each grade level.
 - **Parental Involvement in the Education of Their Children:** We will actively encourage and foster parental involvement by organizing regular meetings with Native American parents and community leaders to discuss their children’s education and progress. We will hold these meetings quarterly throughout the school year, and more frequently as needed.
 - **Mechanisms to Improve Educational Opportunities for Native American Closing the Achievement Gap:** To close the achievement gap and increase graduation rates for American Indian students, we will implement targeted support programs, such as tutoring and mentorship, and monitor their academic progress through data-driven interventions.
 3. **Hispanic Education Act (NMSA §22-23B-2) Goals: (page 57, pages 58-63, pages 65-66)**
 - **Educational Success of Hispanic Students:** Our programs will provide for the study, development, and implementation of educational systems that positively affect the educational success of Hispanic students. We aim to close the achievement gap and increase graduation rates by offering culturally responsive teaching practices.
 - **Parental Engagement:** Equip Academy will host regular family engagement nights and workshops to foster parental involvement in their children’s education. Communication with parents will be provided in both English and Spanish.
 - **Mechanisms to Improve Educational Opportunities for Native American Students to Close the Achievement Gap, Increase Graduation Rates, and Increase Postsecondary Enrollment, Retention, and Completion:** As a K-5 school, the mechanism we will use include ensuring a strong literacy and math foundation that will allow students to thrive in middle and high school, and we will provide a rich college-bound culture starting in kindergarten. Additionally, we will provide mechanisms such as after-school programs and “college begins in kindergarten” workshops for families to improve educational opportunities for Hispanic students, focusing on establishing both the academic skills and the life aspirations needed for more advanced learning in the upper grades, promoting high school completion, and increasing postsecondary enrollment and completion rates with our college preparatory focus.
 4. **Black Education Act (HB 43) Goals: (page 57, pages 58-63, pages 65-66)**
 - **Anti-Racism Policies:** Equip Academy will develop and implement anti-racism policies and provide anti-racism training for all teachers and staff to ensure a safe and inclusive environment for Black students and address implicit biases.
 - **Curricula and Instructional Materials that Recognize and Teach Black Culture and Anti-Racism and Anti-Racism Training for Teachers and Staff:** We will develop curricula and instructional materials that recognize and teach Black culture and history. For example, in our

close reading texts, students will learn about Black culture through rich and affirming fiction and non-fiction texts in grade-appropriate K-5 materials. Our teaching approach will include discussions on identity, societal systems, and their impact on students' lives and futures. Each year, we will provide anti-racism training for teachers and staff.

Exploring One’s Identity and Societal Systems that Impact Students’ Identity and Future: Students will have opportunities to explore their own identities and societal systems through projects and discussions in our social studies and literature classes. For example, in writing, students will have an opportunity to write an All About Me book detailing various aspects about themselves, their family, their culture and identity. This is a great time for students to learn about themselves and others and build a bridge between difference.

RESPONSE - Budget Considerations

Factual error or misunderstanding (See Budget Line Items identified below)

Budget considerations are not criteria elements of Section D. Given the stated concern, however, we have provided details in response to the two budget items raised within the reviewers' response.

Allocating Funds for Bilingual Education: We do not intend to offer a traditional bilingual education program. Our program is designed as structured English immersion to support student’s language acquisition and literacy development using culturally responsive teaching practices, and all resources to support our English Learners are budgeted within our curricular purchases.

Allocating Funds for Staff Travel to Accompany Students on Education Trips: All budget costs for education trips are inclusive of teacher costs, as teachers will travel on the same busses with students. These costs are reflected in Line Item 58, Fund 11000, Function 1000, Object 55817 of the budget details. All trips will occur on regular school days and thus will not require any additional stipends or HR costs.

Equip Academy is dedicated to fostering an inclusive, culturally responsive, and academically rigorous environment that meets the diverse needs of our students. Our strategies and programs are aligned with the goals of the aforementioned educational acts, ensuring that all students have the opportunities and support they need to succeed academically and personally.

D(2).	<p>Equity Plan Proposed school will create an effective and equitable system of supports for all students focused on root-cause analysis, equity-focused leadership and continuous improvement, and culturally and linguistically responsive curriculum and pedagogy</p>
Rating	Expectations

Approaches	<p>A complete response must ensure equal education opportunities for students in New Mexico by:</p> <ul style="list-style-type: none"> ● A plan to initiate and organize an equity council composed of multiple school stakeholders with the intent to create more equitable learning opportunities for marginalized students. ● If the proposed school is to be located in a historically defined Indian impacted school district, a plan for conducting a needs assessment to determine what supports are needed in the public charter school, at home and in the community to help Indian students succeed in school, graduate with a diploma of excellence and be prepared to enter post-secondary education or the workplace. ● A detailed plan for the implementation of a culturally and linguistically responsive framework. ● A detailed plan for attracting and retaining quality and diverse teachers to teach New Mexico’s multicultural student population
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The Equip Academy of New Mexico founding team’s response Approaches the expectations for this section.

Two of the four Equity Plan expectations have not been addressed: 1) Although the response states that an equity council will be formed, how it will be formed has not been articulated; 2) A detailed plan for attracting and retaining quality and diverse teachers to teach New Mexico’s multicultural student population has not been provided.

RESPONSE - Equity Council Formation

Factual error or misunderstanding (page 63)

We appreciate that the reviewers recognized our indications that we do specify our plan to form an Equity Council. Specifically, we state within the application: “Equip Academy of New Mexico (Equip Academy) will create and implement an effective and equitable system that supports all students. The Head of School will be overseen by the Governing Board and will work closely with its committees, including its Culture and Equity Council. The Culture and Equity Council, composed of multiple stakeholders (parents, staff, teachers), will review and provide feedback on school policies (such as discipline policies), procedures, and handbooks to ensure that they are equitable and not biased and will advise the Board should they find potential inequities. They will review annual budgets to ensure that Title I funding is being allocated appropriately. The Culture and Equity Council will meet four (4) times per year to review policy, budget, and academic data as well as any time we may be adopting a new curriculum so that they can review and make recommendations to the team to ensure that there are equitable learning opportunities for all students, including marginalized populations. In collaboration with the Head of School, the Culture and Equity Council will conduct a needs assessment via beginning- and end-of-year surveys in order to determine what supports are needed in school, at home, and in the community in order to better, more authentically support all students to succeed in school.” Our response goes on to highlight and specify the multiple ways that the Equity

Council will be an integral part of our school community, ensuring that we are a fully equitable school for all students.

To further clarify per the reviewers' questions, please see the following:

Establishing a strong equity council involves careful planning, diverse representation, clear goals, and sustained commitment. We will follow and implement best practices for establishing a strong Culture & Equity Council, as informed by the New Mexico Language and Culture Division through the PED:

Diverse Representation

Best Practice: We will ensure that the council includes a diverse group of stakeholders, including students, parents, teachers, community members, and administrators along with a representative from the Board from different backgrounds and perspectives that represent the students we propose to serve.

Equip Academy Implementation: We will invite representatives from various cultural, linguistic, and socioeconomic backgrounds, including members from the Hispanic, Native American, and Black communities to consider a role on the Council. We will highlight this opportunity in all ongoing community outreach with our diverse community partners and highlight this opportunity on our website and in all of our school's newsletters. We will continuously engage community leaders and parents who are actively involved in school activities to consider a role on the Council, with particular attention to ensuring diverse and representative voices at all times.

We will define a clear mission and set specific, measurable goals for the equity council that align with the school's overall mission and the specific needs of the community. We will establish a consistent meeting schedule (e.g., quarterly) and create a platform for open communication, such as a dedicated section on the school website or a regular newsletter to share updates and progress. We will facilitate structured dialogues and use consensus-building techniques to make decisions. We will encourage all members to voice their opinions and concerns, and ensure that decisions reflect the collective input of the council. We will develop a reporting system where the equity council provides regular updates to the school board and the community. We will create annual reports summarizing the council's activities, achievements, and areas for improvement.

E. Graduation Requirements

E.	<u>Graduation Requirements.</u>
Rating	Expectations

Not Applicable	<p>A complete response must</p> <ul style="list-style-type: none"> ● Identify all of the proposed school’s graduation requirements; ● Provide an explanation of how the proposed school will support students behind on graduation to earn a diploma. ● Provide proposed Alternative Demonstration of Competency policies, if any ● Align to state graduation requirements OR explicitly identify all requirements that vary from state minimum requirements; and ● If there are variances from state minimum requirements explain the following: <ul style="list-style-type: none"> ○ why the proposed school believes the change is important ○ how the change supports the mission ○ how the change ensures student readiness for college, career, or other post-secondary opportunities.
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Not Applicable. The proposed school will be serving grades K-5 only.

F. Instruction

F.(1) Instruction	<u>Teaching and Instructional Philosophy</u>
Rating	Expectations
Meets	<p>A complete response must</p> <ul style="list-style-type: none"> ● Describe the teaching and instructional philosophy of the proposed school; ● Identify primary instructional methods to be implemented that ensure equity and that align to the philosophy; ● Identify information that demonstrates the instructional methods are research-based; and ● Describe how the educational philosophy and instructional methods support and align to the mission and curriculum. ● How the proposed instructional methods will best support the population the school intends to serve.

The Equip Academy of New Mexico founding team’s response Meets the expectations for this section.

F.(2) Instruction	<u>Yearly Calendar and Daily Schedule</u>
Rating	Expectations

Does Not Meet	<p>A complete response must</p> <ul style="list-style-type: none"> ● Include a yearly calendar that identifies the following: <ul style="list-style-type: none"> ○ Annual start date and end date ○ Teacher professional development days and times ○ School-wide assessment periods ○ School days, holidays, and partial days ○ Teacher parent conferences; ● Include a daily schedule that identifies the following: <ul style="list-style-type: none"> ○ Instructional times ○ Break times ○ Start and end times ○ Differences in the daily schedule for full and partial days; ● Meet all minimum hour (total instructional time) requirements laid out in NMSA 22-2-8.1; ● Describe how the calendar and schedule support the proposed school’s educational program; ● Describe how the calendar and schedule are optimal for achieving high outcomes for the anticipated student population; ● Describe the extended learning time programs to improve academic success of students and professional learning of teachers; ● If this is an elementary school, and you are participating in k-5 plus or extended learning program, describe the k-5 plus program and extended learning program and provide your calendar for year 2; and ● Be supported by the proposed budget found in the Financial Framework section of the application. ● Describe how the proposed calendar supports and values the community it intends to serve.
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The Equip Academy of New Mexico founding team's response Does Not Meet the expectations for this section.

The calendar reflects a total of 1128 instructional hours which does not meet the current requirement of HB 130 of 1140 hours per year. In addition, the narrative does not describe how the proposed calendar supports and values the community it intends to serve.

The dates for state required testing are given in a table, but not marked on the calendar itself.

The school does request funding in the 910B-5 for K-12 Plus for ten (10) Tier 1 and six (6) Tier 2 days. However, it does not appear that these extra days are reflected in the calendar as applicants indicated they had extra days in their calendar but did not. Receiving K-12 Plus funds in the SEG, but not calendaring those days has a large financial impact on the school. In addition, a calendar for year 2 was not provided.

Additional budgetary concerns are addressed in the Financial Section Part C.

RESPONSE - Instructional Hours

Factual error or misunderstanding (pages 73-74)

Per our understanding of current legislation and the mandate of 1140 instructional hours, schools are allowed to use up to 60 hours of teacher professional development as counting towards those instructional hours. Therefore, with our student-facing calendar of 1094 hours as initially submitted (not the 1128 hours noted within the reviewers’ concern) plus the 60 PD hours as allowed, we reach 1154 hours, which exceeds this 1140 requirement.

The criteria on the charter application document at time of submission continued to refer to the previous version of NMSA 22-2-8.1 that cited 990 hours.

RESPONSE - Testing Dates and Calendar

Factual error or misunderstanding (page 73)

All required state assessments and screeners are included in the key as projected dates based upon their historical dates and windows of administration and will be color-coded into the calendar when the exact testing dates are determined by the Public Education Department.

RESPONSE - Funding, Days, and Calendars

Factual error or misunderstanding (pages 73-75)

Equip Academy’s K-12+ days are reflected in the calendar. As per the most recent 2024 and 2025 K-12+ Program Guidelines Manual funding protocol, the school can use up to 60 hours of professional development towards the K12+ days. Equip Academy has 198.5 hours of professional development built into its budget. At 6 hours per day, we are able to count an additional 10 days (6*10 = 60 hours), for a total of 196 days counting towards the K12+ program. The Tier 1 multiplier is based on total days over 180 and the Tier 2 multiplier is based on total days over 190. The days do not need to be specified as K12+, but they are looking at hours and days in total. The school has 186 instructional days plus over an additional 10 days (6 hours per day) of professional development. Please see image below for reference:

K12+ Program Guidelines Manual

Introduction

In the 2023 Legislative Session, the New Mexico Legislature passed and Governor Michelle Lujan Grisham signed into law House Bill 130. This bill:

- increases the minimum instructional hours requirement to 1,140 hours for all grade levels;
- allows for up to 60 hours of professional work hours for elementary educators and up to 30 professional work hours for secondary educators to count toward the 1,140 instructional hours requirement; and
- repealed the K5+, Extended Learning Time Program (ELTP) and the K12+ grant programs and replaced them with the new K12+ Program. K12+ will now be funded through the State Equalization Guarantee (SEG), eliminating the need for an application and approval process.

What follows is a guide for implementation of the new instructional hours requirements and the K12+ Program.

K12+ Program

The K12+ Program provides additional program units that are funded through the SEG process if the school calendar exceeds certain minimum-day requirements. K12+ is an optional program. The funding formula is illustrated below:

K12+ Program Tier 1			K12+ Program Tier 2		
Calendar	Days	Program Units	Calendar	Days	Program Units
5-day week	181-190	MEM * 0.012 * days	5-day week	191-205	MEM * 0.016 * days
4-day week	156-165		4-day week	166-175	

Additional budgetary concerns are addressed in the Financial Section Part C.

RESPONSE - Year 2 Calendar

Factual error or misunderstanding (page 73)

We were specifically informed by NMPED Charter Schools Division staff that we are not required to provide a Year 2 Calendar at this time based on the grade span our school proposes to serve. If this guidance has changed, we are prepared to submit a Year 2 Calendar upon request.

RESPONSE - Additional Concerns

Clarification

Equip Academy has responded to, updated and taken into consideration all concerns raised.

F.(3) Instruction	<u>How Instruction will be effective for the student population.</u>
Rating	Expectations

Does Not Meet	<p>A complete response must</p> <ul style="list-style-type: none"> ● Identify the anticipated student population, including: <ul style="list-style-type: none"> ○ Demographic information based on the local community population ○ Educational proficiency based upon enrollment at the school ○ Attendance and truancy trends ○ English language proficiency ○ Diverse populations ○ At-Risk populations ○ Special Educational needs; ● Explain any special factors influencing the makeup of the anticipated student population; ● Explain how the educational philosophy has been designed to meet students' needs; ● Explain how the instructional methods have been designed to meet students' needs and specifically how they will meet the needs of at-risk students; and ● Explain how the yearly calendar and daily schedule have been designed to meet students' needs. ● Explain how the yearly calendar and daily schedule have been designed to meet students' needs.
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The Equip Academy of New Mexico founding team's response Does Not Meet the expectations for this section.

Attendance and truancy trends are not addressed, which can be a significant factor in student and school success. This needs to be anticipated and procedures for tracking and remediation need to be addressed.

Special Educational needs were not fully addressed in this section; readers were instead referred to Section G. Special Populations.

The narrative provided specifically reiterates the philosophy and theoretical approaches that the school will use. The data provided is from APS only and the information of the curriculum approach is based upon data outside of New Mexico with a different population. It's not clear as to whether the curriculum approach will make a significant difference in student performance.

RESPONSE - Special Educational Needs

Clarification (pages 86-115)

We appreciate the reviewer's recognition that details regarding special education needs were located within Section G, and while extensive details were located there, within Special Populations, we appreciate the opportunity to provide those details here as well in response to this section and its criteria.

We anticipate serving the same student population as located on the Westside and the wide variety of learning needs those students bring. Until students are enrolled in the school, we are unable to know their specific needs, and will only know what those specific needs upon presentation. Our model is created to address those varying needs as they present, and we will remain diligent and attentive to specific needs as they arise.

As outlined in Section G pages 87-88, our instruction methods will serve the needs of students with IEPs in various ways. Our model will support students within the Least Restrictive Environments (LRE), giving students the fullest access to the general education curriculum and setting, and thus the opportunity to learn and grow at their own pace and with the necessary supports in place. MLSS is a scaffolded approach to interventions for academics, progress monitoring, and behavioral support. For example, Layer 1 of MLSS requires that all students receive high-quality, well-planned, well-executed, and evidence-based curriculum and instructional strategies as well as behavioral supports that are proactive and preventative. Progress monitoring for Layer 1 will occur, at minimum, every 6-8 weeks. MLSS Layer 2 comes into play when a student's needs are not being met despite Layer 1 interventions and thus may require more targeted support. Students may receive a small group with supplemented time throughout the day. For example, academic interventions may be used to build students' knowledge and skills around letter identification and letter sounds in the early grades when students are learning the foundations of reading. Behaviorally, students may need small group support under the supervision of a school counselor or social worker. Students receiving Layer 2 supports will have monthly progress monitoring. MLSS Layer 3 is the most restrictive support offered to students experiencing an educational crisis. In addition to receiving Layer 1 and Layer 2 interventions, students needing additional support will move into Layer 3, receiving more intensive support such as extended time to complete work, 1:1 student to teacher support, and progress monitoring on a weekly or bi-weekly basis. We will incorporate the MLSS and its three layers, which will inform all aspects of our approach to supporting the success of every student.

Our inquiry-based, data-driven educational philosophy is designed to meet the diverse needs of our students. By fostering critical thinking, creativity, and engagement, we aim to close the achievement gaps and provide a robust foundation for lifelong learning. Instructional methods include differentiated instruction, small group interventions, and culturally responsive teaching practice. The school calendar and daily schedule are structured to maximize instructional time and provide regular opportunities for remediation and enrichment, both shown to be critical for students with special needs.

RESPONSE - Our Community

Factual error (pages 80-85)

We have conducted extensive outreach and collected detailed data on the local student population, including educational proficiency levels, attendance and truancy trends, English language proficiency, and the needs of diverse and historically marginalized and underserved populations. This local data has guided our curriculum development to ensure it is both relevant and effective for our students. Additionally, we have established partnerships with local educational institutions and experts to continually refine our approach based on local need, real-time feedback, and outcomes. As a public school we will be available to students across the City of Albuquerque, however, our target community is on the Westside and our demographic details reflect that focus:

- The Westside of Albuquerque is a community with a high percentage of Hispanic (83%), English learners (30.9%), and students eligible for free/reduced lunch (96.4%). This area has historically low academic performance, with only 26.1% reading proficiency and 14.3% math proficiency among elementary students.
- Our target population includes students with below-average proficiency in core subjects, as evidenced by local school data.

- We will serve a diverse population with significant representation of Hispanic, Native American, and African American students. Our programs will cater to historically marginalized and underserved students through tailored interventions and support services.

RESPONSE - Curriculum and Local Relevance

Factual error or misunderstanding (pages 80-85)

Albuquerque Public Schools data reflects the current state of student achievement for all learners, including those with special needs, and the results demonstrate the chronic lack of academic success of local schools. Schools with similar socio-economic, racial and ethnic backgrounds, and with similar percentages of special education students and English Learners demonstrate the efficacy of our curriculum selections and instructional approach. We are committed to meeting the learning needs of the students we aim to serve and taking curricular approaches that will make such success possible.

Our curricula are nationally vetted and used successfully in both urban and rural schools with similarly high percentages of historically under-served and historically marginalized communities, including high percentages of students of color and low-income students that mirror the demographics of our proposed school community. The curriculum is further adapted to the local context of Albuquerque's Westside and our state as a whole. We have incorporated, and will continue to do so throughout the term of the charter, local cultural elements and community input to ensure it consistently resonates with and is relevant to our students' experiences. We understand the importance of utilizing relevant and locally-sourced data to ensure our curriculum is tailored to the specific needs of our student population in Albuquerque's Westside. Our curriculum, while informed by successful models from high-performing schools nationwide, is carefully adapted to reflect the unique demographics and assets of our community such as having close reading text about local Pueblos, green chile, Balloon Fiesta, and other significant cultural elements.

Further, our curriculum is designed to be highly adaptable and responsive to the specific academic and cultural needs of our students. For instance, our literacy programs incorporate language acquisition strategies to support our anticipated population of English learners, and our math curriculum includes hands-on, inquiry-based learning methods proven to engage and advance students in similar demographic settings. We will implement rigorous, ongoing assessments to monitor student progress and make data-driven adjustments to our instructional methods.

Equip Academy is committed to demonstrating that our curriculum approach will significantly improve student performance. By leveraging both national best practices and local insights, we will provide a high-quality, equitable education that meets the needs of our diverse student body and fosters academic excellence. Our goal is to ensure that every student not only meets but exceeds state academic standards, closing the achievement gaps and preparing them for a successful future.

The curricula's track record of success with similar communities, the proposed Head of School's deep experience working with the curricula towards measurable and dramatic student growth and success with similar communities including a high percentage of ELs and students with disabilities, and our plan to further adapt the curriculum for specific needs within our community cumulatively demonstrate the promise of our selections and approaches to deliver results that far exceed current and chronic low academic performance in our target community and as desired by our local families.

G. Special Populations

G.(1a)	<u>Instructional Services and Supports for Students with IEPs</u>
Rating	Expectations
Does Not Meet	<p>A complete response must describe how the proposed school will identify and provide:</p> <ul style="list-style-type: none"> ● instructional supports and services to the spectrum of needs of students with disabilities, who have IEPs or are eligible for an IEP; ● instructional supports and services to gifted students who have IEPs or are eligible for an IEP; <p>Describe how the proposed school will</p> <ul style="list-style-type: none"> ● Ensure that students who are ELs are not over-identified as students with disabilities; ● Identify specific responsibilities for school staff, classroom teachers, and special education staff; and ● Identify specific training and support that will be provided to teachers and school staff to ensure they are able to fulfill their responsibilities. <p>Describe the proposed school's:</p> <ul style="list-style-type: none"> ● Timeline, benchmarks, and people responsible for developing discipline policies and protocols for your special populations. ● Capacity of the school district in the geographic boundaries of the proposed school to provide special education services and FAPE. ● Process for tracking this protected population's progress and services, how that will be reported to the board.

The Equip Academy of New Mexico founding team's response Does not Meet the expectations for this section.

The response provided addresses most requirements for this section with the exception of identifying instructional support that will be given to gifted students. The narrative states that a team will be created with an LEA to build this program in year 1.

RESPONSE – Instructional Support for Gifted Students

Factual error or misunderstanding (pages 87, 109-110, 76, 93, 162, 181)

We appreciate the reviewers' assessment that our response addressed most requirements. They do note one missing criteria, however, we believe that such criteria has been addressed.

Specifically, and as stated within the application, "We will serve gifted students in our school through a holistic approach that attends to their unique learning requirements while nurturing their intellectual growth and accommodating based on goals from IEP. By year one, a "Gifted individualized education program team" or "GIEP team" will be established with a designated "Local Education Agency (LEA) to ensure all all requirements and rules of 6.31.3.1 are followed, including efforts the LEA and Equip will make to identify gifted students from all demographic groups, including racially and ethnically diverse students, economically diverse students, culturally diverse students, EL or multi-lingual students, and students with disabilities." (page 87)

Clarification

Further, as seen in FIGURE 67 found in H.(3) (pages 109-110) which asks for additional details on this same item, students will be monitored and actions plans will be created based on student progress.

Gifted	<ul style="list-style-type: none"> ● SAT team, pertaining teachers ● Family phone call or meeting ● List of students who qualify for DLM, data and action plan to the Governing Board
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Additionally,

- On page 76, point (5): differentiated work for gifted students for example, students might be working on a self-selected project because they have demonstrated mastery on other assignments, and this is a time to challenge them.
- On page 93: The Head of School’s monthly reports, provided to the Board and reviewed within public monthly meetings, will present all academic data, disaggregated by subgroup, including EL, multilingual and gifted students (including gifted EL).
- On page 162: ensuring that all of our students with identified special needs (including gifted students) receive a high-quality education and support needed to be successful in their learning.
- On page 181: PD has been developed to meet the requirements of NMAC 6.65.2.8 around meeting the highest standards for professional development through designing, implementing, and evaluating professional development programs that ensure all students are learning by using student data to determine adult learning priorities, monitor progress, and help sustain continuous improvement. Gifted students are included in support of our professional development which is planned with student’s in mind.

1. Unit Dives. Focus on content, grade level, standard alignment, necessary materials and charts, assessments and checkpoints, rubrics, scope and sequence, scaffolds for diverse learners (special education students: IEP, ELs, gifted students), high expectations, inquiry-based lens
2. Data Analysis and Work Analysis. Assessments and protocols, accommodations, exceeding/meeting/approaching/below grouping, assessment trends, action planning (reteaching, regrouping, small group focus, 1:1 support), at-risk students, MLSS tier interventions
3. Deliberate Practice. Teachers practicing planned lessons, giving and receiving in-the moment feedback, reflect and adjust teacher practice based on feedback
4. Lesson Planning and Instructional Preparation. Teaching objective, inquiry-based, grade-level standards alignment, roadmap of questions, back pocket questions, pacing and including diverse learners

RESPONSE - Progress Monitoring Frequency for How Equip Academy Will Comply

Factual error or misunderstanding (pages 92, 95)

Our response to this section includes FIGURE 43 (page 92) which specifies frequency of progress monitoring. We include that figure for you here as well.

FIGURE 43 - Timeline For Supporting Special Education Students

Progress Monitoring	Action Item	Frequency	Responsible Party
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Item			
Weekly Progress Report	Students with “Weekly Progress Report” Indicator on IEP	Weekly	Teachers, Administrators, Education Coordinator
Progress Toward Goals	Report out for students with IEPs	End of each term	Teachers, Administrators, Education Coordinator
SAT process and MLSS monitoring	Monitoring analysis reporting and recommendations	Monthly	Teachers, Administrators, Education Coordinator
Intermittent Grades	Entering grades	Bi-Monthly	Teachers
Proficiency Data and Report Cards	Student cumulative grades	Quarterly	Teachers (grades input), operations prints report cards, HOS presents data
EL and Special Education Analysis	Report analysis to determine eligibility and growth	Quarterly	Teachers (grades input), HOS/Education Coordinator analysis
Overall Special Populations Program Evaluation	Stop, continue or add items based on analysis	Annually	Governing Board, HOS, Education Coordinator and teachers

In addition, Equip Academy outlines how it will comply with the requirements in the law through the details provided in FIGURE 45 (page 95) within the charter application (Section G.(1b), also provided below. In addition, please see all details above in this response which also addresses how we will comply.

FIGURE 45 - Progress Monitoring Frequency

Type of Support	Time & Frequency	Responsible Parties	Action Items
Tier 1-3 Support	Constant	Teachers SPED Teachers Education Coordinator Admin	Deploy the MLSS 3 Layer intervention system
Referral	Anytime	Parents Teachers Admin	Based on observations and success of interventions referral for evaluation
Evaluation and Eligibility	Upon submission to state	Experts in the field	Evaluation assessments, deliberation, and identifying disability
IEP Development	After	SAT Team	IEP goals, accommodations and modifications to

	evaluation and eligibility	Admin Teacher(s) Parents	support in learning
Implementing IEP	After meeting	Teachers SAT team	Who, what, and how the supports will be provided based on need
Review and Revise the IEP	Post IEP Development (dependent on goal date)	Teachers SAT Team	Monitoring and reviewing pieces that (1) IEP is being executed as it should and (2) that it's working for the student
Reevaluation	3 years or as requested by parent	SAT Team	Evaluation and assessment process to determine continued eligibility
SAT Process	Ongoing	SAT Team Admin Teachers	Process above as well as tracking growth and success
IEP Goals: Progress Review	Quarterly	All Teachers	IEP Goal progress reported during grading systems
Layer 2 Caseload Review	Bimonthly	HOS All Teachers SAT Team	Teachers present to SAT and HOS on how Layer 2 case load of students are doing
At Risk/Layer 3 Caseload Review	Weekly	HOS All Teachers SAT team	HOS and SAT, plan and monitor Layer 3 case load students interventions and progress monitor
Grade Generating	Quarterly	All Teachers	Grade input and inform families
Data Dives and Action Planning	After all state assessments, internal assessments	All Staff	Analysis based on state and internal assessments, focus on subgroups including students with IEPs, action plan around goals
Work/Data Analysis and Action Planning	Weekly	All Teachers	Use data to identify trends, the whole grade, class and students; plan for interventions and reteach
Overall Program Evaluation	BOY & EOY	Admin SAT Team	BOY: Goal setting for frequency of meeting, evaluation process, data analysis, MLSS, progress monitoring EOY: Reflect, review and revise based on success of overall evaluation program

G. (1b)	<u>Monitoring and Evaluation of Special Education Students</u>
Rating	Expectations

Approaches	<p>A complete response must</p> <ul style="list-style-type: none"> ● Describe how the proposed school will monitor the progress toward special education students’ attainment of IEP goals; ● Identify specific responsibilities for school staff, classroom teachers, and special education staff; including when and who will be reporting on progress towards goals. ● Identify the regular intervals at which progress will be monitored and success will be evaluated; ● Identify specific actions/reporting that will engage and inform students and or families; and ● Describe how the school will evaluate the effectiveness of its special education program and services. ● Describe how mission success will be tracked, measured, ensured and reported on with these special populations.
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The Equip Academy of New Mexico founding team’s response Approaches the expectations for this section.

The narrative indicates that the Head of School will be responsible for monitoring progress of students with IEPs or regular education teachers will assist. There is minimal contractual money for a special education teacher to assist but it appears to be part-time. There is a plan to hire an education coordinator in Year 4, but with the population specified that they want to enroll in the school, Special Education needs to be addressed beginning in Year 1. Based on the number of students anticipated to be enrolled, the timeline and budget to support special education students and provide services is inadequate.

The narrative does not fully address how mission success will be tracked, measured, ensured and reported on with a special population. The proposed tracking and reporting of mission success is a standard, required process and is not specific to the mission.

RESPONSE – Head of School Responsibilities

Factual error or misunderstanding (pages 94, 97)

As the instructional leader of the school, including the academic program for our EL students, the Head of School will oversee the implementation and monitoring of the EL program in the first year to ensure its quality implementation; as a slow growth school with 75 students in Y1, the Head of School is both well-positioned and experienced in the vision for our EL program, and is the instructional leader of the school responsible for all aspects of the academic program, including that for our ELs. In all future years, the Head of School will train others and oversee and support the continuing quality of the program.

RESPONSE – Mission Success

Factual error or misunderstanding (pages 98-99, 99)

For all students, including those with IEPs, mission success is measured by their academic growth. Our responsibility is to ensure that all students are receiving the instruction and support needed for them

to succeed in school, able to acquire the knowledge and skills to engage deeply and to ultimately pursue a life of purpose.

We have outlined on pages 98-99 our approach for evaluating the effectiveness of our Special Education Program, and as seen below:

Evaluating the Effectiveness of Our Special Education Program

As a reflective and feedback-driven institution, we pride ourselves on our reflection and feedback. Therefore, we will undergo strategic evaluation processes to determine the effectiveness of our special education programming. More specifically, we will look at how successfully the MLSS interventions have worked while taking a deeper look into how effective the three layer interventions have been. We will reflect and measure our compliance with federal and state regulations. Some indicators of success will be a low percentage of students needing Level 2 and Level 3 interventions, the number of students who are graduating out of the MLSS process, and the number of students meeting IEP goals based on intervention supports. We will also analyze the following:

- Data
 - Monitoring, recording, reporting and responding to instruction based on data, daily, weekly, quarterly and annually.
 - Comparison data of special education and , between neighboring schools/APS/state/nation, across all students, special education and EL subgroups, gifted students
- Tier Numbers
 - Number of referrals to the Student Assistance Team for Tier 2 interventions, and the outcomes from those meetings
 - Number of referrals to Tier 3, and the outcomes from those referrals
- Growth
 - Growth of students receiving special services, in comparison to those who are not receiving special services
 - Percentage of students meeting IEP goals
 - Number of students exited from special education programming
- Most Effective academic and behavioral interventions
 - Types of interventions provided and the effectiveness of the interventions.
- Behavior trends of students with special needs

This reflection process will be done at the beginning of the year to set goals around MLSS, as well as monitor progress, conduct data analysis, and ensure adequate frequency of meetings. The end of year will determine if the goals are met and how the overall program could be revised to ensure our goals are being met and students are learning and growing.

Second, please see FIGURE 48 (page 99) Timeline For Supporting Special Education Students within the application and also provided here.

FIGURE 48 - Timeline For Supporting Special Education Students

Progress Monitoring Item	Action Item	Frequency	Responsible Party
Weekly Progress Report	Students with “Weekly Progress Report” Indicator	Weekly	Teachers, Administrators , Education Coordinator

	on IEP		
Progress Toward Goals	Report out for students with IEPs	End of each term	Teachers, Administrators, Education Coordinator
SAT process and MLSS monitoring	Monitoring analysis reporting and recommendations	Monthly	Teachers, Administrators, Education Coordinator
Intermittent Grades	Entering grades	Bi-Monthly	Teachers
Proficiency Data and Report Cards	Student cumulative grades	Quarterly	Teachers (grades input), operations prints report cards, HOS presents data
EL and Special Education Analysis	Report analysis to determine eligibility and growth	Quarterly	Teachers (grades input), HOS/Education Coordinator analysis
Overall Special Populations Program Evaluation	Stop, continue or add items based on analysis	Annually	Governing Board, HOS, Education Coordinator and teachers

Third, as referenced beginning on page 77 of our application, our approach to ensuring mission success for special populations includes using IEPs for personalized goals and progress tracking, with regular monitoring and reports for parents. The MLSS framework provides a three-tiered intervention system overseen by the SAT for timely evaluations and effective support. Data-driven decisions will be informed by frequent assessments and data reviews. We will offer continuous professional development for staff, ensure parent and community engagement through conferences and events, and provide monthly transparent reports to the Governing Board. Annual evaluations will guide improvements, ensuring mission success and support for all students, especially those with special needs.

Finally, and in addition as specific to our mission as stated on page 99, “We believe that all students can master the knowledge and skills needed to engage deeply, dream audaciously, and reach their full potential. This belief system includes students of all learning profiles and cognitive make-ups. All students, including students with IEPs, are assessed with the rest of their peers. All students with IEPs will be evaluated with the same frequency as their peers, and all families will receive progress reports aligned to their IEP goals with the same frequency as progress reports provided to all families. We will abide by all mandated accommodations (i.e., extra time, directions read, frequent breaks). Data will be gathered for the student on an IEP and there will be accommodations made according to their needs. Standards and benchmarks will guide instruction, interventions, supports, and learning. We will gather and examine work samples, implement checklists and rubrics aligned to IEP goals, and we will evaluate student growth and success in a variety of ways and in accordance with their IEP.”

G.(2a)	<u>Required Curriculum and Instructional Supports for English Learners</u>
Rating	Expectations

Approaches	<p>A complete response must</p> <ul style="list-style-type: none"> ● Describe how the proposed school will identify English Learners (ELs) and provide the required curriculum and instructional services/supports to students identified as ELs; ● Identify how the school will implement the English Language Development Standards for ELs in its school; ● Identify how the school will provide ELs with instruction and support to develop English language proficiency; ● Identify how the school will provide ELs with access to grade-level content; ● Describe how the school will address the spectrum of needs that ELs may present; ● Identify specific responsibilities for school staff and classroom teachers; and ● Identify specific training, professional development and support that will be provided to teachers and school staff to ensure they are able to fulfill their responsibilities; ● Describe the proposed school’s process for tracking this protected population’s progress and services, how that will be reported to the board.
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The Equip Academy of New Mexico founding team’s response Approaches the expectations for this section.

The response indicates that all students will be given the Language Usage Survey during enrollment. This is incorrect. The LUS should only be given to students who are entering NM public education for the first time. The applicant therefore also does not give a process for identifying students not new to public education in NM whose status is unknown, which is a common situation.

The Head of School is responsible for implementing and monitoring the EL identification program for the first year as well as training staff and Instructional Assistants on the program. The founding team may need to reconsider the role of the Head of School and the numerous duties that have been assigned to this position.

RESPONSE – Language Usage Survey

Factual error or misunderstanding (pages 100-101)

Equip Academy is aware the LUS survey is only mandated for students who are entering into the NM public education system. However, schools have discretion to ask the parents/guardians of all newly-enrolling students to fill it out as a best practice in order to ensure accuracy within the STARS system and provide important insight to the school about supporting the student and communicating effectively with their family. This addresses one of the concerns stated here: “The applicant therefore also does not give a process for identifying students not new to public education in NM whose status is unknown, which is a common situation.”

As seen in FIGURE 49 on page 100, the survey is crucial in determining students EL status, and thus allowing us to ensure we are providing support and services where needed. The detailed description of this process can be found in the Equip Academy application, specifically within pages addressing English Language Learners (ELs) and their identification and support mechanisms, such as pages 52 to 57, and sections outlining curriculum and instructional support. Because we recognize, however, that

this is not mandated for all families, we will require this of students newly entering NM public education and encourage but not require any family whose student is not newly entering the NM public education system to complete the LUS and have their student participate in screening if appropriate.

[According to the New Mexico Language Usage Survey Guidance Handbook: Tools for Identifying Potential English Learners](#)

Serving ELs who Opt-Out of EL Programs

- Parents have the right to opt their children out of EL programs or particular EL services. This decision must be voluntary and based on a full understanding of the EL child’s rights, the range of services available to the child, and the benefits of such services to the child.
- If a parent decides to opt his or her child out of EL programs or particular EL services, that child still retains his or her status as an EL and must be assessed annually using the ACCESS for ELLs[®].
- Districts/schools must continue to monitor the ELP and academic progress of students who opt out of EL programs or services. If a student does not demonstrate appropriate growth in ELP or maintain appropriate academic levels, the district/school must inform the parents of this lack of progress in a language they understand and again offer EL services.

RESPONSE – Head of School Responsibilities

Factual error or misunderstanding (page 101)

The Head of School will oversee the implementation and monitoring of the EL program in the first year to ensure accuracy and soundness of the implementation process. As a slow growth school with enrollment of a small cohort of 75 students in Y1, we are confident that the Head of School, who is the instructional leader of the school, can and should establish this critical part of our academic program. The founding team has reconsidered the organizational structure and will bring in an Education Coordinator in Y2. The Head of School will remain an active participant in the SAT team in monitoring Special Population students' achievement and success and the Education Coordinator will oversee this process.

G.(2b)	<u>Monitoring and Evaluation of English Learners</u>
Rating	Expectations
Approaches	A complete response must <ul style="list-style-type: none"> • Describe how the proposed school will monitor the progress of ELs toward English language proficiency, both annually and within the school year; • Identify specific responsibilities for school staff and classroom teachers; • Identify the regular intervals at which progress will be monitored; • Identify specific actions/reporting that will engage students and/or families; • Describe how the school will evaluate the effectiveness of its EL program and services; and • Describe how the school will monitor exited EL students (reclassified fluent English proficient students—RFEPs) for two years for academic progress.

The Equip Academy of New Mexico’s founding team's response Approaches the expectations for this section.

The school is using a specific curriculum to teach English language learning to EL students. It's not clear as to whether teachers will support student learning in their home language or will they require students to learn English using just this model. Staff responsibilities are listed but many of the staff to be involved do not start until year 4 or 5 and not in year 1 where the Head Administrator is the responsible party.

Under the subsection *Monitoring Progress of ELs Toward English Language Proficiency*, the narrative states that "those who opt out of services will be monitored annually for two years". This statement is incorrect. Additionally, under the subsection *Specific Responsibilities-School Staff and Teachers*, the narrative states that the ". . . Education Coordinator will request and collect LUS survey information to all incoming students upon the enrollment process information". This is also incorrect. The LUS is to be administered only to students who are new to public education with no LUS on file.

RESPONSE – English Language Learning Approaches

Factual error or misunderstanding (pages 108-109, 109-110)

Through our comprehensive literacy and language acquisition program, students will receive materials only in English. All content will be taught in English to support students' language development to support strong reading in English skills.

RESPONSE - Staffing Levels in All Years

Factual error or misunderstanding

Our staffing plan provides all needed staff to oversee and implement our EL program.

As outlined on pages 109-110, these are Specific Responsibilities for School Staff and Teachers, all of whom are in place in all years of operation.

Identification Process. Through the identification process, the Office/Office staff and the HOS (years 1-3), Education Coordinator years 4+ will request and collect LUS survey information to all incoming students upon the enrollment process information.

Screening/Assessing Process. With the supervision of the HOS/Education Coordinator, the Office Assistant/Office Manager/Manager of Operations will report who needs to be screened/assessed for either the WIDA or ACCESS and will create a logistics plan which will include who will be tested, when they will be tested, and will assign testers. The staff administering the tests might be the SAT or teaching staff.

Data Tracking Process. With the supervision of the HOS/Education Coordinator, OPS will store and file all hard copies of surveys/screeners/assessments. All non-EL, identified ELs, exited ELs, RFEP students as well as intervals of progress will be tracked via a data dashboard (PowerSchool, Google Drive etc.).

Parent/Guardian Notification and Communication. Based on EL testing results, a Notification Letter will be generated by OPS and sent home by homeroom teachers. Follow up for written consent for EL services will be the responsibility of the teacher and data will be tracked by OPS and overseen by the HOS. Upon 100% of opt-in or opt-out letters, OPS will report who will be receiving services, and teachers will receive a confirmed list of EL identified students who will receive services. Teachers, OPS

and administration all have the ability to inform, follow up, and update parents/guardians as needed. This process and set of responsibilities will be rolled out during staff training.

EL Monitoring Process. Progress monitoring will be done by educational staff under the supervision of the HOS/Education Coordinator. Teachers will provide high-quality instructions with support for ELs. Classroom data will be tracked and monitored weekly during data dives. Teachers will know how all of their students are progressing in terms of their EL status and how they can best be supported. The HOS/Education Coordinator will observe teachers ensuring supports are being implemented effectively.

Additionally, we will have Regular Intervals for Progress Monitoring

Indicators of success will be witnessed through (1) inquiry-based observations for student-centered dialog, (2) internal and external assessment data analysis, and (3) the ACCESS assessment. With our focus on teacher support and student growth, we will frequently monitor student achievement and success. Observations will be weekly (including feedback and support), monthly, and quarterly to track progress and annually to monitor how students are progressing. The ACCESS assessment will indicate continued status and EL progress. This and other assessments will inform instructional decision-making.

RESPONSE – English Language Learning Staffing and Responsibilities

Factual error or misunderstanding (page 101, 109)

As the instructional leader of the school, the Head of School will oversee the implementation and monitoring of the EL program in the first year to ensure its successful implementation and strong, effective, and accountable processes. As a slow growth school with a small cohort of 75 students in Y1, we are confident that the Head of School can and should ensure the inaugural implementation and then train and oversee staff to implement the program in future years.

RESPONSE – Monitoring EL Students’ Progress

Factual error or misunderstanding (pages 108-109)

Families must agree to services offered to EL students and they have the right to opt-out of support offered to EL students. Equip Academy will not legally be allowed to pull those students for services; however, we will continue to monitor them closely and update families on progress in accordance with the rest of the school. See image below:

[According to the New Mexico Language Usage Survey Guidance Handbook: Tools for Identifying Potential English Learners](#)

[Serving ELs who Opt-Out of EL Programs](#)

- Parents have the right to opt their children out of EL programs or particular EL services. This decision must be voluntary and based on a full understanding of the EL child’s rights, the range of services available to the child, and the benefits of such services to the child.
- If a parent decides to opt his or her child out of EL programs or particular EL services, that child still retains his or her status as an EL and must be assessed annually using the ACCESS for ELLs[®].
- Districts/schools must continue to monitor the ELP and academic progress of students who opt out of EL programs or services. If a student does not demonstrate appropriate growth in ELP or maintain appropriate academic levels, the district/school must inform the parents of this lack of progress in a language they understand and again offer EL services.

Equip Academy is aware the LUS survey is only mandated for students who are entering into the NM public education system. However, schools have discretion to have all students fill it out as a best practice. Oftentimes what happens is that the survey has been filled out incorrectly. Equip Academy will have all students fill it out and do a STARS check for accuracy. As seen in Figure 49 on page 100, the survey is complex and crucial in determining students EL status to ensure we are providing support and services where needed. The detailed description of this process can be found in the Equip Academy application, specifically within pages addressing ELs and their identification and support mechanisms, such as pages 52 to 57, and sections outlining curriculum and instructional support. We will respect the decision of any family whose child has been in NM public education prior to enrolling at Equip Academy, and will not make completion of the survey by these families a requirement for full enrollment and participation in our school and all of its programs.

G.(3)	<u>Plan to adhere to ESSA and State Statutes</u>
Rating	Expectations
Approaches	<p>A complete response must Describe how the proposed school will:</p> <ul style="list-style-type: none"> ● Develop an educational framework to address the educational needs of Native American, Hispanic, Black and bilingual multicultural students within a culturally and linguistically responsive approach to learning; ● Identify specific responsibilities for school staff and classroom teachers, including professional development for teachers; ● Ensure that the best practices are used in teaching, mentoring, counseling and administration are culturally and linguistically responsive to students; ● Ensure policies will be culturally and linguistically responsive; ● Demonstrate rigorous and culturally meaningful curricula and instructional materials will be developed and implemented; ● Identify the regular intervals at which progress will be monitored; ● Identify specific actions/reporting that will engage students and/or families; and ● Evaluate the effectiveness of its programs to improve educational outcomes. ● Describe how the proposed school will meet the specific requirements of the Black Education Act

The Equip Academy of New Mexico founding team’s response Approaches the expectations for this section.

The response provided did not address the following expectations: 1) Identify specific responsibilities for school staff and classroom teachers, including professional development for teachers and 2) Identify the regular intervals at which progress will be monitored.

RESPONSE – Specific Responsibilities for Staff and Teachers

Clarification (page 107, 106)

The two items noted by the reviewers have been addressed, but were placed in response to G.(2). We bring your attention to those details here.

As outlined on page 107, under the heading Teacher and Staff Trainings, Professional Development, and Support, staff responsibilities include: ELD Process including, identifying, supporting, exiting and monitoring EL students, such as conducting regular progress monitoring; tracking all academic data and disaggregating that data by identified subgroups, and analyzing that data for communication with families and students and instruction decision-making; and providing transparent reports to the Governing Board. Monthly Board reports will present disaggregated data on EL progress, ensuring continuous improvement and compliance with state and federal regulations. Professional development will focus on supporting ELs, data analysis, and effective instructional strategies, ensuring staff are equipped to meet the diverse needs of EL students. This approach ensures that ELs are identified accurately, supported effectively, and provided with opportunities to develop English proficiency while accessing grade-level content, thereby promoting their academic success and overall well-being. As provided in the application within G.(2a) which sheds further detail, please see FIGURE 55 (page 106) , which we provide here as well.

Specific Responsibilities – School Staff and Classroom Teachers

FIGURE 55 - Staff Roles and Responsibilities

Staff Role	Staff Responsibilities
Head of School (HOS)	Develops and supports systems and logistics for identifying, assessing, tracking, and progress monitoring ELs. Oversees the execution of identifying, assessing, tracking, and progress monitoring and reporting to the Governing Board and communicating with families about EL status, support and proficiency. Ensures school communicates and notifies parents about EL status and potential services.
Office Assistant/Office Manager/Manager of Operations	Supports record intake and organization. Documents record-keeping of EL status, identifying and knowing who is EL classified, reclassified, or exited from the program and still in indeed of monitoring. Communicates and notifies parents about EL status and potential services.
Education Coordinator	Acts as stakeholder in oversight and informs decision-making for overall EL services and leads the SAT Team. Supports LTs and IAs with best instructional practices in ELD programing and intervention support. With theOffice Assistant, communicates and notifies parents about EL status and potential services.
Special Education Teachers (SpEd)	Acts as stakeholder in oversight and informs decision-making for overall EL services. Supports LTs and ATs with best instructional practices ELD programing and intervention support.
Lead Teachers (LT)	Upholds the same standards for ELs as for general education students. Provides the same high-level educational services to ELs as with non-ELs but with scaffolded, targeted support to meet ELs’ specific needs. Works closely with SpEd teachers and Education Coordinator to implement best practices, as well as track data and progress around growth and EL goals.
Instructional Assistants	Work with all teachers to reach goals set by homeroom teachers. Support students by providing best practices for EL, tracking data, maintaining family communication, and supporting in a range of ways based on school and student need.
Social Worker	Supports the social and emotional health of the school by providing individual or group counseling, working closely with teachers on ways to best support the emotional and behavioral needs of all students, including ELs, creating positive behavior plans as needed, and maintaining open and frequent communication with parents. A Social Worker will be contracted until year 5 when we bring in the position full time.

Governing Board & Culture and Equity Council	Provides oversight and ensures accountability of the Head of School (HOS) regarding the Equip Language Acquisition Program, record keeping for EL status, and reporting of EL students and their proficiency. The Culture and Equity Council oversees and works closely with HOS on Equip Academy’s Culturally and Linguistically Responsive (CLR) program heavily guided by New Mexico Public Education Department’s Design Tool and CLR Guidance Handbook (in response to the the findings in the Martinez and Yazzie Lawsuit).
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RESPONSE – Regular Progress Monitoring Intervals

Clarification (page 120-121)

Please see all details below as provided within the charter application Section H.(1) Assessments and Accountability (pages 120-121) which specify all regular progress monitoring intervals for our special populations. We provide that same detail here (pages 120-121) regarding G.(2).

Special Population Assessments

In addition to the assessments previously detailed, Equip Academy incorporates state-mandated evaluations specifically tailored for our students with special needs and English Learners as well as identifying these subgroups for gifted services. Details about the annual assessments for these groups are outlined below.

FIGURE 62 - Special Population Assessments

Assessment	Testing Time Frame	Purpose	Frequency, Data Analysis to Inform Instruction
Dyslexia Screener (English screeners: Lexercise; Spanish screeners: Istation (ISIP))	Before 40th Day	Grades: 1 State mandated, screener for dyslexia to identify children who may experience dyslexia. Students will be screened in their primary language.	Once annually A student whose screening demonstrates characteristics of dyslexia shall receive targeted structural literacy interventions with ongoing (daily, weekly) monitoring to determine if the student is making adequate progress.
Dynamic Learning Maps (DLM)	Spring	Grades: 3-5 Assessment designed for students with multiple significant cognitive disabilities. Individualized test designed for students to demonstrate their skills.	Once annually Data will be analyzed during summer to inform curricular lessons and structure for students with specific IEPs. Students will receive targeted reading interventions, etc. and actively monitor student progress through independent practice.

<p>ACCESS for English Language Learners</p> <p>And</p> <p>WIDA Alternate ACCESS for ELLs</p>	<p>By 40th Day (listening, speaking)</p> <p>By 120th Day (reading, writing)</p>	<p>Grades: K-5</p> <p>This assessment process includes tools specifically designed to identify potential English Language Learners (ELLs). The WIDA Screener is an English Language Proficiency test administered to incoming students suspected of being ELs. This screener helps determine each student's level of English language proficiency and the specific instructional supports they require. Additionally, students already identified as ELs take the ACCESS test, which measures both their social and academic English language proficiency.</p>	<p>Once annually</p> <p>BOY for WIDA Screener placement test. Data will be used to identify potential EL students.</p> <p>Once annually</p> <p>MOY for WIDA ACCESS. Provides information to help enhance instruction for ELs, and gives information about the level of readiness of a student to exit English language support programs. EL students will receive targeted reading interventions and actively monitor student progress through independent practice and exit tickets.</p>
<p>Gifted Universal Screening³</p>	<p>Universal screening will be administered by the end of grade 3</p>	<p>Grades K-3</p> <p>To advocate for students of underrepresented groups due to cultural or linguistic background, socioeconomic status, or disability conditions, in order to ensure that these students have equal opportunities to benefit from services for gifted students.</p>	<p>Once, based on assessments</p> <p>Universal screening assessment results shall be used for referral for further assessment and may include group or individually administered assessments of academic achievement or cognitive ability. Analysis of qualitative and quantitative data from multiple sources to assess areas of strength. Sources shall include: standardized quantitative assessment data; qualitative data from the assessment of student abilities by qualified individuals evaluating evidence such as collections of work, audio and video recordings, interviews, or observations; and if applicable, performance assessments or standardized assessments of artistic ability.</p>

All first-grade students will undergo a dyslexia screening, after which classroom teachers will receive specific instruction and tools for monitoring each student's progress effectively. Every student identified as an English Language Learner (EL) must take the annual WIDA ACCESS test. This assessment evaluates each EL student's proficiency in English across listening, speaking, reading, and writing skills. The Administrators will analyze results to set benchmarks, track progress, make decisions about reclassifying students' need for English language support services, and refine instructional planning.

Students identified with significant cognitive disabilities will take part in the Dynamic Learning Maps assessments. These assessments ensure inclusion in state assessment and accountability frameworks. The results will help define each student's performance level, contributing to the development of their Individualized Education Program (IEP), setting instructional goals, identifying strengths and areas for improvement, and guiding classroom instruction.

Data Studies

In addition to the above assessment plan, teachers and leaders will actively monitor student progress on a daily and weekly basis to ensure significant academic gains, employing four data study cycles

³ [New Rule \(nm.gov\)](http://www.nm.gov).

each year. This monitoring is vital for assessing the performance of all students, including specific subgroups such as Indian, Hispanic, Black, EL, and Special Education students, against established standards and goals. The Head of School will lead these data studies, which include comprehensive schoolwide, grade-level, and class-specific data analysis. The process involves staff collaboration to identify trends and plan actions based on the data, such as adjusting instructional responses, regrouping students, and determining the need for targeted support like small group or one-on-one interventions. Additionally, data studies will address areas requiring reteaching and explore parental involvement opportunities. For subsequent assessments within the year, comparative, longitudinal data will also be analyzed to track progress towards goals using reading and state-required assessments.

H. Assessment and Accountability

H.(1)	<u>Assessment Plan</u>
Rating	Expectations
Approaches	<p>A complete response must</p> <ul style="list-style-type: none"> ● Include an assessment calendar that identifies all state or district mandated assessment periods and dates related to teacher analysis/use of assessment data to inform instruction <ul style="list-style-type: none"> ○ Include assessments/progress monitoring for special populations; ● Identify, for all state or district mandated assessment periods, the grade levels at which the assessments will be administered; ● Describe, for all state or district mandated assessment periods, the specific data that will be collected, reported, analyzed, evaluated, and utilized to inform instruction; ● Describe how the data identified will be used to inform instruction; ● Describe the school’s philosophy on the use of data and how teachers will be onboarded, trained and supported to ensure the schools philosophy is followed; ● Align with all state assessment and data reporting requirements; ● Describe how the assessment plan meets the specific needs to equitably assess the proposed school’s projected student population; ● Describe how the assessment plan aligns to the proposed school’s mission and any assessments that may be used to determine, measure and track equitable mission achievement; and ● Include any assessments that may be negotiated as part of the performance framework and contract.

The Equip Academy of New Mexico founding team’s response Approaches the expectations for this section.

The following concerns were noted by the review team:

- The calendar does not explicitly state dates related to teacher analysis. However, it is noted that dates are given in the response to the next section H.(2).
- The narrative does not specifically address how the assessment plan aligns to the school's mission and any assessments that may be used to determine, measure and track equitable

mission achievement. It is noted, however, that Mission alignment is addressed in the next section (H.2).

- The testing window for the WIDA ACCESS test is inaccurate. The testing window is mid-January through mid-March. In addition, the Alternative ACCESS test is not mentioned.
- The narrative does not describe the school’s philosophy on the use of data and how teachers will be onboarded, trained and supported to ensure the school’s philosophy is followed.
- The description for how the assessment plan meets the specific needs to equitably assess the proposed school’s projected student population is inadequate. It is noted, however, that more detail was provided in H.(2).

RESPONSE – Calendar and Data Analysis Dates

Clarification (pages 124, 73)

We appreciate the reviewers noting that we have included dates related to teacher analysis overall within Section H. We apologize for failing to place these within H.(1) and placing data analysis (Data Studies) and schedule in response to H.(2) within FIGURE 63 (page 124). To satisfy all criteria for H.(1), we have provided that figure and accompanying narrative below.

FIGURE 63 - Equip Academy Assessment Programing Snapshot

Assessment Programing
AUGUST
August 6 - 29 - Screeners (20 days time frame)
August 11 - Dyslexia Screener (1st Grade within the first 40 Days)
August 29 - SAT Progress Monitoring Meeting
SEPTEMBER
September 11-12 - Number Stories (CGI) Assessment
September 15-30 - Reading Assessment Cycle #1
September 25-30 - BOY iStation K-5 Assessment
September 26 - SAT Progress Monitoring Meeting
OCTOBER
October 1 - 2 - Reading Assessment Cycle #1 Continued
October 3 - End of Quarter 1
October 8 - Data Study #1
October 30 - SAT Progress Monitoring Meeting
NOVEMBER
November 24 - SAT Progress Monitoring Meeting
DECEMBER
December 1-12 - Reading Assessment #2
December 8-10 - MOY iStation K-5 Assessment
December 12 - End of Quarter #1
December 17 - Data Study #2
December 18 - Family Conferences & Report Cards #2
December 19 - SAT Progress Monitoring Meeting
JANUARY
January 3 - ACCESS Testing Begins (Likely until February 27th)
January 30 SAT Progress Monitoring Meeting
FEBRUARY
February 27 - SAT Progress Monitoring Meeting (Determine DLM)
February 27 - ACCESS Complete
MARCH
*TBD - Dynamic Learning Maps Assessment (DLM)
March 6 - End of Quarter #3
March 10 - Report Card Distribution
March 11 - Data Study #3
March 12 - PID Family Conferences & Report Cards #3
March 27 - SAT Progress Monitoring Meeting
APRIL
TBD - Science Assessment (5th)

After internalizing the data at all levels, the Head of School will prepare and present the data to staff in an open-ended way for teachers to answer the same questions on behalf of the students around the data. (a) What are the trends that are occurring within my classroom. (b) How did these results occur? (c) What are the action steps that will be put into place as a response to data? Finally, and based on class and student need, teachers might (5) take whole group actions steps to reach whole class goals, create a re-teach plan with an eye toward standard specific gaps, create a small group support plan, and/or create student-specific goals. All goals will be measurable with a timestamp as well as clear steps as to how students will be supported based on need. This is not a comprehensive list of assessments and analysis and the Gifted assessment will be given as needed with the goal being prior to grade 3.

FIGURE 63 provides a snapshot of our assessment programming. It includes all major state-mandated assessments and internal mission-specific assessments. Please note that this is not a comprehensive list of assessments and data studies. Through our robust professional development within our education institute, we will focus on unit assessments as well as bi-monthly quizzes during our early dismissal days dedicated to professional development by diving into student work in order to gain a better understanding of where students are at as a whole. In addition to State

mandated assessments as well as mission specific assessments, **FIGURE 63** indicates when progress monitoring will happen - SAT Progress Monitoring Meetings (which occur monthly at minimum). Based on need, we might meet weekly or bi-weekly, as we monitor student achievement and success for our EL, IEP, gifted and 504 students as well as any other at-risk students who are not meeting or exceeding grade level benchmark. The Gifted assessment will be administered based on need and will be a topic of discussion during our SAT Progress Monitoring meetings with a running list of students who need to be gifted-assessed. Additionally, **FIGURE 63** indicates when data studies will take place post each quarter to get a cumulative analysis as to where students are academically and how as a school we should respond and prepare to meet the needs of all students. Also a part of our programming is parent partnership and this snapshot shows when we are having our parent conferences post our end-of-quarter data studies. This will prepare teachers to ensure that they inform families on how we can partner together to best support students both at home and at school. Our assessment programming also indicates when report cards will be distributed, which is a total of four times per year. Our academic programming concludes with an SAT Progress Monitoring Meeting and an overall program evaluation including a Student Wellbeing and Competency Survey analysis given in early April and encouraged to complete by May 15th (unless an alternate distribution and due date are provided by the state). Here we will look at the success of our programming which is directly correlated to the success of our students. We will think about what we need to continue, start or stop doing based on the success of our programming. Our 4 data analysis and action planning will follow the four-step cycle below.

As noted in the calendar (page 73), we provided all state assessment dates and windows within the key (see below).

State Assessment Dates
*Gifted Screener will be given as needed
August 6 - 29 - Screeners (20 days time frame)
August 11 - Dyslexia Screener (1st Grade within the first 40 Days)
September 25-30 - BOY iStation K-5 Assessment
December 8-10 - MOY iStation K-5 Assessment
January 3 - ACCESS Testing Begins (Likely until February 27th)
February 27 - ACCESS Complete
March *TBD - Dynamic Learning Maps Assessment (DLM)
April TBD - Science Assessment (5th)
May TBD - NM MSSA ELA/Math (3-5)
May 11 - 12 - EOY iStation Assessment K-5

RESPONSE – Narrative and Mission Alignment

Factual error or misunderstanding (pages 117-118, 120, 122)

The content requested in this section is addressed fully within this section.

Clarification (page 123)

Further, the content within Section H.(2) provides further details as required. To fully satisfy the criteria of H.(1), we have provided details found in H.(2) (page 123) below.

Data Driven Institution

As a data-driven school, we bring a prioritized focus on teacher growth - the foundation for ensuring academic growth for all students and closing the achievement gap for all learners. The curriculum is one significant point of focus within our professional development, training, and support for teachers; others are our assessment program, data analysis, and action planning for student success.

We consistently and reliably progress monitor for student growth: we know where any academic holes are and how we can support our students to fill them. We have designed and will implement a robust protocol for training, observing, and providing teacher feedback on their instructional practices and interventions – all informed by student data - that in turn will systematically create master teachers and dramatically improve student outcomes here in New Mexico.

Specifically, we believe that considering our approach to data must be seen as an integral part of our overall teacher academic training that address four areas: (1) Unit Launches, (2) Lesson Planning and Internalization, (3) Deliberate Practice, and (4) Data Analysis/Student Work Analysis.

RESPONSE – WIDA Access and Alternative Access Windows

Factual error or misunderstanding (pages 121-122)

Both are included with correct windows. Please see image of FIGURE 62 (pages 121-122)below. MOY (Middle of Year) refers to the Jan-March window.

<p>ACCESS for English Language Learners</p> <p>And</p> <p>WIDA Alternate ACCESS for ELLs</p>	<p>By 40th Day (listening, speaking)</p> <p>By 120th Day (reading, writing)</p>	<p>Grades: K-5</p> <p>This assessment process includes tools specifically designed to identify potential English Language Learners (ELLs). The WIDA Screener is an English Language Proficiency test administered to incoming students suspected of being ELs. This screener helps determine each student’s level of English language proficiency and the specific instructional supports they require. Additionally, students already identified as ELs take the ACCESS test, which measures both their social and academic English language proficiency.</p>	<p>Once annually</p> <p>BOY for WIDA Screener placement test. Data will be used to identify potential EL students.</p> <p>Once annually</p> <p>MOY for WIDA ACCESS. Provides information to help enhance instruction for ELs, and gives information about the level of readiness of a student to exit English language support programs. EL students will receive targeted reading interventions and actively monitor student progress through independent practice and exit tickets.</p>
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RESPONSE – School Philosophy on Data and Teacher Training to Implement Philosophy

Factual error or misunderstanding (pages 117, 122)

The first paragraph states our philosophy: “This approach ensures that we accurately gauge each student’s learning and growth. By tailoring our assessments to reflect the diverse needs and backgrounds of our students, we commit to providing a truly inclusive educational environment. This method allows us to identify areas where students excel and where they may need additional support, ensuring that all students have the opportunity to succeed and thrive. To make this vision a reality, it is crucial that students have access to engaging, relevant, and rigorous instruction that aligns with the proficiency expectations... The effective use of high-quality assessment data to understand

student progress is key to fulfilling our commitments to families. By doing so, we ensure that our students are on track for success and equipped with the essential knowledge, skills, and deep conceptual understanding they need to excel in their future endeavors.” (page 117)

How teachers will be trained and supported is stated in the last paragraph of the section entitled, “Data Studies” (page 122). Onboarding will occur in the first three weeks of summer institute for educator excellence and various times throughout the year based on the assessment calendar teachers will (1) be introduced to the assessment and why we are assessing (2) understand the assessment and what it entails (3) know how to administer the assessment (4) understand how to score with a provided rubric. All training will be provided by our proposed, founding Head of School who brings proven and extensive experience as both a teacher and instructional leader and most recently as an Assistant Principal and Director of Assessment.

RESPONSE – Assessment Plan and Equity

Clarification (page 128)

We appreciate the review team recognizing that a detailed response to this was provided in H.(2). To ensure satisfaction of H.(1), we include these details (page 128) here as well.

As indicated in H.(2): Emphasis on Growth Modeling Students of color (African American, Hispanic, American Indian, Hawaiian and Pacific Islander), students from low-income families or those who qualified for Free or Reduced Lunch (FRL), and English Language Learners (EL) students fall significantly below the standard when comparing educational outcomes such as assessment scores.

There is a persistent achievement gap in the United States, and this gap has been more detrimental for historically marginalized students. Students of color, ELs and those in special education tend to have lower initial levels of academic achievement scores compared to their White peers, thus even if they grow at the same rate or faster, it does not guarantee the gap will close. Besides race/ethnicity alone, students in higher income schools grow at a slower rate over time compared to lower income schools, but the initial level of achievement for students in the lower income schools is much lower, thus students less fortunate have more to grow over time. Students for whom English is a second language in kindergarten are already behind their English peers on initial achievement scores.

A focus on time and growth is a critical factor in understanding achievement gaps overtime between student groups, especially on the Albuquerque Westside. Elementary school is a critical point in cognitive development that appears to be a first formal indicator of long-term academic success and gains throughout formal schooling. Longitudinal growth models provide a valuable framework for analyzing and exploring changes in academic disparities and growth at various stages of a student's educational journey.

We will continuously collect achievement scores from students throughout their academic time with us, and we will consistently disaggregate the data by subgroup to ensure equitable review, analysis, communication, and action planning. This data will inform a longitudinal growth model aimed at identifying aggregate trends and informing strategies for us to proactively and deliberately address and close historical achievement gaps for all subgroups. This comprehensive and disaggregated data will be shared with the Governing Board, school leaders, teachers, families, and students to foster a collaborative community relentlessly aimed at identifying and addressing barriers to student success.

H.(2)	<u>Plan for Data Assessment Analysis</u>
Rating	Expectations
Approaches	<p>A complete response must</p> <ul style="list-style-type: none"> ● Identify the processes the school will use, including specific action steps, triggers that would prompt action steps, responsible parties, timelines, and associated costs, to <ul style="list-style-type: none"> ○ monitor academic performance and ○ take appropriate corrective action if the school is not on track to or does not meet academic performance expectations; ● Address specific responsibilities related to <ul style="list-style-type: none"> ○ meeting student academic achievement or growth expectations <u>at the school-wide level</u> and ○ meeting student academic achievement goals <u>at the individual student level</u> (remediation/at-risk student); and ● Describe how the school will regularly evaluate the effectiveness of its academic program generally and the effectiveness of specific corrective actions or interventions. ● Describe how the proposed school intends to use the data gathered from assessments to drive instruction ● Describe the board's role in analyzing the data gathered to inform school wide progress and potential changes.

The Equip Academy of New Mexico founding team’s response Approaches the expectations for this section.

The narrative response addressed all of the expectations for this section. However, additional details on what triggers would prompt corrective action needed and how data gathered from assessments will drive instruction would add to the completeness of the narrative.

It is unclear whether appropriate funding is available in the budget for testing and instructional materials, especially in the last two years of the charter term.

RESPONSE – Triggers that Prompt Corrective Action and How Data will Drive Instruction

Factual error or misunderstanding (pages 122-128)

We appreciate the reviewers noting that the charter application’s narrative response addressed all of the expectations for this section. Therefore, the rating of Approaches appears contradictory to this statement.

Please note that the application team often used the phrases “response to data” and/or “informs instruction” which for us are synonymous to action triggered by data, which is a phrase used by the reviewers but is not found in the criteria for this section.

Clarification (pages 122-128)

To be thorough in response to the review comments, for additional details with use of “triggers,” please see below.

Equip Academy's philosophy on the use of data is grounded in a continuous improvement model where data drives instruction and supports student growth. Teachers will be onboarded, trained, and supported through regular professional development sessions focused on data analysis and application. This includes training on how to interpret assessment results, develop action plans triggered by student data, and implement targeted interventions to support student achievement in response to such triggers.

The Equip Academy assessment plan is structured to continuously monitor academic performance and implement corrective actions to ensure all students achieve their academic potential. Our comprehensive process includes specific action steps, defined triggers for those actions, responsible parties, timelines, and associated costs.

Equip Academy's assessment plan integrates both formal and informal assessments to track student progress consistently. Specific triggers for corrective actions include identifying trends from daily interactions, weekly assignments, and quarterly assessments. For example, if a student's performance on weekly exit tickets shows a decline in understanding, this triggers a focused intervention plan involving small group or one-on-one support. Similarly, quarterly assessments provide a broader view, prompting school-wide or grade-specific action plans if needed. These interventions are crafted based on detailed analysis of assessment data, ensuring they are timely and effective.

The Head of School is primarily responsible for creating action plans based on data analysis. This includes professional development sessions, grade-level meetings, and individual teacher support. Teachers are responsible for implementing these plans in their classrooms, with regular observations and feedback to ensure fidelity. The Board plays a critical role in evaluating the overall effectiveness of the academic program and the specific corrective actions. They review progress monthly and make necessary adjustments to the action plans to ensure goals are met.

Data collected from various assessments are analyzed to identify learning gaps and inform instruction. For instance, analysis of first-grade math assessments may reveal common misconceptions, triggering targeted re-teaching strategies and differentiated support. Teachers use this data to adjust their instructional approaches, ensuring they address the specific needs of their students. This iterative process of assessment, analysis, and action planning ensures that instruction is responsive and adaptive.

The Board regularly reviews assessment data to monitor school-wide progress and inform decision-making. They ensure the school meets its performance benchmarks and provide oversight on the implementation of action plans. The Board also allocates necessary resources to support these plans, ensuring the school has the means to achieve its academic goals.

Equip Academy is committed to providing a robust and comprehensive assessment plan that not only meets but exceeds the expectations outlined. By addressing these key areas, we are confident in our ability to effectively measure and support student learning, drive instructional improvements, and fulfill our mission of fostering academic excellence and equity.

Our teachers are trained to use differentiated instructional strategies based on assessment data. This means that we tailor our teaching methods to meet the individual needs of each student, particularly those from diverse and historically marginalized and underserved populations. For example, for

English learners, we employ strategies such as sheltered instruction and scaffolded learning to help them access the curriculum and demonstrate their understanding. For students with special educational needs, we provide accommodations and modifications that ensure they can participate fully in assessments and demonstrate their true capabilities.

RESPONSE - Budget Considerations

Factual error or misunderstanding (page 126, Budget details)

All associated costs for implementing the assessment plan, including staffing, curriculum materials, and professional development, are accounted for within the budget in all years.

H.(3)	Plan for Student Progress/Achievement & Communication Plan
Rating	Expectations
Approaches	<p>A complete response must</p> <ul style="list-style-type: none"> ● Identify how student achievement and progress will be communicated to <ul style="list-style-type: none"> ○ Students ○ Parents ○ The governing body ○ The authorizer ○ The broader community; ● Identify the communication plan for each of the specific sources of student achievement data identified in H.(1) and any other relevant sources of student achievement data; and ● Provide information that demonstrates the plan is effective in reaching the targeted population and the specific community in which the school plans to locate.

The Equip Academy of New Mexico founding team’s response Approaches the expectations for this section.

The narrative for this section does not sufficiently provide information that fully demonstrates the plan is effective in reaching the targeted population and the specific community in which the school plans to locate.

NOTE: Although preceded by a statement that assures all data with student information will be filed in a secure location by the operations team, as part of the communication plan for assessment (Figure 67) it is stated that “a list of students who qualify for DLM, dyslexia, gifted, or EL, data and action plan to the Governing Board”. If a list of students will actually be provided to the Governing Board in a public meeting, it would be a FERPA violation.

RESPONSE – Plan for Student Progress Within the Local Community

Factual error or misunderstanding (pages 131)

As stated within our charter application response, our approach is directly chosen because of its appropriateness for our community and is in alignment with PED's guidance. This language is reproduced below.

Effectiveness for our Community

Our overall approach is informed by the mission for our community, the chronic underachievement of many identified subgroups, and our state's clear plan for closing achievement gaps for all students. It is informed by national research⁴, much of which is embedded within New Mexico's larger educational plan across the state, as well as the successful work of our proposed Head of School as she worked and led in high-achieving, high-need communities.

To clarify further here in response to the reviewer's concern, Equip Academy has developed a thorough and structured approach to assessment that ensures all students, especially those from diverse and historically marginalized and underserved populations, receive the support they need to succeed. This plan includes regular monitoring of academic performance, clear triggers for corrective action, detailed responsibilities, and a commitment to using data to drive instructional decisions. With a well-defined budget and active board oversight, Equip Academy is well-equipped to meet its academic performance expectations and foster a culture of continuous improvement within our local community.

RESPONSE - FERPA Compliance

Clarification (page 130)

Regarding the communication plan for assessment (FIGURE 67, page 130), we acknowledge the importance of maintaining confidentiality and complying with FERPA regulations. We want to clarify that the intention is not to share specific student data with the Governing Board in a manner that violates FERPA. Instead, all student information will be securely managed and only aggregated data will be shared in public meetings to inform decision-making without compromising individual student privacy. When discussing student groups such as those qualifying for DLM, dyslexia, gifted, or EL programs, only anonymized data and summaries will be presented to the Governing Board. Detailed action plans will be handled by the operations team and relevant staff members, ensuring compliance with FERPA.

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

⁴ <https://tntp.org/publication/the-opportunity-myth/>.

membership; and (3) the nature and extent of parental, professional educator and community involvement in the governance and operation of the school (NMSA 22-8B-8(I)).

A.(1)	<u>Key Components of Governance Structure</u>
Rating	Expectations
Approaches	<p>A complete response must</p> <ul style="list-style-type: none"> ● Include governing body bylaws in Appendix A; and ● Summarize <u>key</u> governance components in the application response as follows: <ul style="list-style-type: none"> ○ Membership structure (number, roles, length of terms) ○ Officer structure (roles, election process, responsibilities, length of terms) ○ Committee structure that includes both legally required committees and school-specific committees (selection process, responsibilities, membership, length of service terms) ○ Member recruitment, selection, discipline, and removal processes.

The Equip Academy of New Mexico founding team’s response Approaches the expectations for this section.

The narrative includes a number of concerns and inaccuracies regarding the audit committee and governing body bylaws:

Audit Committee

- Although the membership of the Audit Committee is stated in the narrative as "This committee will consist of two members, neither of whom are a part of the Finance Committee." (p. 38), the narrative does not include additional required members. As per NM 22-8-12.3 the audit committee must have: 2 Governing Board Members, 1 Parent, and 1 Volunteer with accounting or finance experience. The Head of School and Business Manager are ex-officio members. *Note:* In the Appendix A By-Laws, however, the following statement is included regarding the Audit Committee: "Membership of the Audit and Finance Committees shall comply with NMSA Section 22-8-12.3(8)
- The applicant states: "The Audit Committee is responsible for preparing the school for its financial audit each year, starting with presenting multiple external auditors or auditing service for the Governing Board to consider and ultimately select." The charter school is required to use their authorizers (PED) audit.

Governing Body Bylaws

- The narrative did not include that the Governing Board is required to replace departing board members within 45 days per statute.
- Bylaws give a removal process for board members, but not possible reasons for removal. The board should consider adding mechanisms for removing officers as well.
- The bylaws provided are barebones and will need revision if the application is approved.
- "As appropriate and necessary, the Governing Board shall follow Robert’s Rules of Order for all meetings." The board should either follow them or not. Later in the bylaws it states the board WILL follow Robert's Rules.
- "Meeting notices and agendas must be posted publicly at least seven (7) calendar days prior to the meeting." Note, this goes beyond what is required by OMA.
- The summary does not include term lengths for board members or officers.

- Bylaws give a removal process for board members, but not possible reasons for removal. The board should consider adding mechanisms for removing officers as well.
- The bylaws provided are barebones and will need revision if the application is approved.
- The Governance Committee and Audit Committee both evaluate the board.

In addition, there was no mention that the Governing Board is required to be a Board of Finance and all members must sign assurances to this when elected to the board.

RESPONSE – Audit Committee

Clarification (page 135)

We appreciate the opportunity to clarify details regarding the Audit Committee membership. We affirm that per NM 22-8-12.3, the Audit Committee will include 2 Governing Board Members (neither of whom are part of the Finance Committee, 1 Parent, and 1 Volunteer with accounting or finance experience, and that the Head of School and Business Manager will be ex-officio members. Further, we affirm that the Governing Board is required to and will use the authorizers PED audit.

RESPONSE – Governing Body Bylaws

Clarification (pages 132-135, APPENDIX A - Bylaws)

We affirm that the Governing Board will replace departing board members within 45 days per statute.

Board members will be considered for removal should they not comply with Board policies, including but not limited to, the Conflict of Interest Policy, Code of Ethics, and Attendance Policy. They may also be considered for removal based upon behavior that is contrary to the public's trust as a member of a public charter school board.

We look forward to finalizing the Bylaws post-approval to ensure full completion; the proposed bylaws were based on those as currently approved within other NM charter schools and publicly available guidance.

The Board will follow Robert's Rules of Order.

Meeting notices and agendas will meet or exceed all timelines as required by OMA.

Board members will serve up to two 3-year terms; officers will serve 1-year terms and can serve multiple terms based upon annual board votes.

The Governance Committee and Audit Committee both evaluate the board.

RESPONSE – Board of Finance and Assurances

Clarification (page 133)

We confirm that the Governing Board is required to be a Board of Finance.

We further confirm that all Board members must and will sign assurances to this when elected to the Board.

A.(2)	<u>Governing Body Qualifications</u>
Rating	Expectations
Approaches	<p>A complete response must</p> <ul style="list-style-type: none"> • Identify all qualifications and skill sets that the governing body will require and ensure those are represented within its regular membership and how the proposed board would be able to ensure the long-term success of this school if, by some circumstance, the Founders were no longer involved. • Explain why and how the identified qualifications and skills will ensure the governing body has the required capacity and enable the governing body to operate a successful, high-quality public school; • Describe how the board will ensure robust board membership including training expectations, time commitments, and member onboarding. • Include a list of all proposed initial governing body members, describe each proposed member’s specific qualifications and skill sets through verifiable prior experience, and ensure the represented qualifications and skill sets align with the previously identified qualifications and skill sets that the governing body will require.

The Equip Academy of New Mexico founding team’s response Approaches the expectations for this section.

The response focuses entirely on the founding board members with no indication of future planning for long term success. There is very little about general qualifications and skills. Not enough explanation as to how identified qualifications and skills will ensure capacity and successful operation. Some mention of specific areas of expertise provided. Response states that board members will need to understand time commitments but does not describe how time commitment will be ensured. Onboarding will happen, but not described.

RESPONSE – Long Term Success

Clarification (pages 148-151)

Although not directly stated in this section, Long Term Success is outlined under Sustainability in C.(1) of this larger section which focuses primarily on sustainability. We provide these details below as well.

Fiscal Compliance and and Ethically Sustainable Protocols

Equip Academy of New Mexico procedures were prepared with K12 Accounting and Sen. Daniel Ivy-Soto with an eye toward compliance and sustainability. Within this section are our policies around Safeguarding Assets, Operation Efficiency and Compliance.

Internal Control Procedures

Equip Academy's Governing Board will review all financial policies and procedures annually, led by the Finance Committee and with support from K12 Accounting to ensure that our policies and procedures remain orderly and in compliance. Frequent audits by the Finance Committee will be conducted internally ensuring all documentation and approvals are accounted for and on file. The Finance Committee will review, provide feedback, and present recommendations for the improvement to maintain sustainability. The Audit Committee will solicit feedback from the firm conducting our annual audit, and the Governing Board will use any audit findings or expressed concerns as a gauge of the effectiveness of the internal controls. The Equip Academy proposed HOS has been working with our proposed business management service provider, K12 Accounting, and collaboratively built the budget, and will continue to work in consultation with them as our financial policies and procedures are established. Equip Academy of New Mexico's Founding Team is taking an "All Hands on Deck" approach when it comes to understanding the Internal Controls. Our proposed **Board Finance Committee** Chair has read, reviewed and internalized the document, and presented the Equip Academy Internal Controls to the rest of the **Founding Board** on Friday, 5/17/24 during a Board training led by the proposed **HOS**. K12 Accounting is located in New Mexico, holding the requisite license for New Mexico school business officials. Additionally, **K12 Accounting services** includes the appointed **Business Manager**, a NM licensed school business official, and an **Assistant Business Manager** who will maintain a level of staff to ensure segregation of duties and a substantial review process to support the needs for Equip Academy of New Mexico. K12 Accounting services include but are not limited to: general ledger maintenance and review, payroll, cash reconciliations, accounts payable payments, state and federal reporting, payroll liability reconciliation, and financial statement prep and audit preparation. K12 Accounting is both an ACES and CES vendor and Equip Academy of New Mexico plans to use one of these procurement agencies to contract with them.

RESPONSE – General Qualifications and Skills

Factual error or misunderstanding (pages 135-137)

In addition to mission alignment and fundamental beliefs to serve as a board member for Equip Academy, stated on page 136 are the "Desired Qualifications for Governing Board Members" and "Critical Skills and Professional Experience" expected of Founding Board Members and future Board Members. Lastly, important skills are also listed in Appendix A under Governing Board Job Description.

The details below are from this section of the charter application.

The Equip Academy Founding Team has thoughtfully recruited Founding Board whose members: (1) possess a diversity of critical skills, professional experiences, and personal qualities needed for strong governance; (2) hold shared fundamental beliefs about public education for New Mexico's students; and (3) possess personal commitment to and values that align with Equip Academy's mission.

The Founding Team sought out individuals with experience and skills in the areas of finance, education, governance, human resources recruitment and management, strategic planning, community engagement, legal compliance and regulatory oversight, and fundraising. To ensure adequate experience in these critical areas in the event a Board member must vacate their seat, we took care to ensure that there is overlap in our Board members' areas of expertise.

We identified these areas as most important for the operational health of the school as well as its philosophical direction. Experience in finance is necessary as the Board builds the budget each year and closely tracks expenses and monitors compliance. Experience in education - including awareness of state-level education policy changes and fluency in mission-specific elements of the school's model, like inquiry-based instruction - will hold the Board true to our goal of dramatically growing academic achievement and measuring outcomes using data. Board members with governance experience will

give the Board the leadership experience needed to develop and follow meaningful procedures and best practices in governance. Those with HR and management skills will equip the Board to hire, evaluate, and ensure accountability in the Head of School's role and to inform all personnel policies as considered and Board-approved. Strategic planning skills are vital as we put our school on track for long-term success through sound decision-making over the years in areas including facilities planning, sustainable enrollment growth, and the ultimate vision of a full K-5 school. Community engagement along with diversity, equity, and inclusion skills are vital as the Board works to serve all of Equip Academy of New Mexico's students and their families effectively, no matter their income level, preferred language, identity, or area of residence. Experience in ensuring organizational legal and regulatory oversight is critical as we take responsibility for the oversight of a public charter school. Finally, experience in community leadership, engagement, and fundraising will be indispensable as the Board works to build relationships in our Westside community - and beyond - to ensure the school has the resources and support it needs to adequately serve its families. These skill sets will not only serve Board members as they apply their specific expertise in service of the school, but will also equip them with the broader professionalism needed to guide the board with wisdom and integrity.

A diversity of perspectives, cultivated through different backgrounds, ages, cultural identities, and community ties - like longstanding residence or engagement in the Westside community - was also a priority in considering the kind of governing Board membership that can steer the school to success.

RESPONSE – Time Commitment

Factual error or misunderstanding (page 151)

Equip Academy made an effort to point out the time commitment through training obligations (including number of hours), retreats and included a tentative monthly meeting schedule (page 151). Additionally, as stated within this section: In addition to these qualifications, Founding Board and Governing Board members must be prepared and willing to make significant contributions of their time and application of their skills. This includes, but is not limited to: satisfying minimum state requirements for Governing Body training (currently 10 hours for new Board members and 8 for continuing Board members); onboarding at the start of their first term to ensure familiarity with Equip Academy of New Mexico's academic, financial, legal, and strategic circumstances; service on one or more Board Committees; and regular monthly Governing Board meetings and committee meetings throughout the year, which may last for several hours each time. Additional meetings or projects may be necessary from time to time as well. While effort will be made to schedule these onboarding and training sessions efficiently - such as through a day-long Annual Meeting retreat before the start of the school year - and to use the Governing Board's time wisely at committee and full Board meetings, Board membership requires a significant time commitment. Current Founding Board members understand and agree with this demand on their schedules; prospective Board members will also be made aware of these expectations and must commit to their full participation prior to being approved for joining the Board.

RESPONSE - Onboarding

Clarification (pages 141-142, 142-142)

Although not indicated within this section, the onboarding process is detailed in B.(1) of this section on pages 141-142.

Onboarding and New Board Member Training

New Governing Body members are required by PED rule (NMAC 6.80.5.8) to complete 10 hours of training within the first fiscal year of service on the Board. This includes our Founding Board which, upon charter authorization, will transition to the Equip Academy of New Mexico Governing Board; members will immediately begin taking steps to complete this training on time.

These minimums for new Board members include seven hours of training which each Governing Board member must complete being allowed to vote in Governing Board meetings. Per Department rules, these hours of training will include:

- two hours of training on public official/charter school governing body ethics and responsibilities;
- two hours of training on charter school fiscal requirements;
- one hour of training on understanding and evaluating academic data;
- one hour of training on open government, legal, and organizational performance requirements; and
- one hour of training on equity and culturally and linguistically responsive practices.

All mandatory external training will be administered or approved by the Public Education Department. New members will receive this training and additional internal training as a critical part of their Board onboarding process. There is also additional Equip Academy, “Additional Internal Training” outlined and “Continuing Board Member Training” from 142-143.

A.(3)	<u>Selection of Governing Body Members</u>
Rating	Expectations
Approaches	<p>A complete response must</p> <ul style="list-style-type: none"> ● Identify a regular and ongoing governing body recruitment process, including identification of action steps, timelines, and responsible parties; ● Describe the onboarding process, the board’s role in chartering and re-chartering, authorizer relations, and time commitment.

The Equip Academy of New Mexico founding team’s response Approaches the expectations for this section.

The response provides a detailed description of the selection process for new members. However, there is no description of the onboarding process, the board's role in chartering and re-chartering, or authorizer relations.

Governance Council members have an extensive recruitment process which requires an extensive time commitment to the school which could negatively impact someone from having a full-time job and still devoting extensive time to the school.

RESPONSE – Onboarding, Chartering, Authorizer Relations

Clarification (pages 141-142, 142-142)

Although not indicated within this section, the onboarding process is detailed in B.(1) of this section on pages 141-142.

Onboarding and New Board Member Training

New Governing Body members are required by PED rule (NMAC 6.80.5.8) to complete 10 hours of training within the first fiscal year of service on the Board. This includes our Founding Board which, upon charter authorization, will transition to the Equip Academy of New Mexico Governing Board; members will immediately begin taking steps to complete this training on time.

These minimums for new Board members include seven hours of training which each Governing Board member must complete being allowed to vote in Governing Board meetings. Per Department rules, these hours of training will include:

- two hours of training on public official/charter school governing body ethics and responsibilities;
- two hours of training on charter school fiscal requirements;
- one hour of training on understanding and evaluating academic data;
- one hour of training on open government, legal, and organizational performance requirements; and
- one hour of training on equity and culturally and linguistically responsive practices.

All mandatory external training will be administered or approved by the Public Education Department. New members will receive this training and additional internal training as a critical part of their Board onboarding process. There is also additional Equip Academy, “Additional Internal Training” outlined and “Continuing Board Member Training” from 142-143.

RESPONSE – Governance Council Time Commitment

Factual error or misunderstanding (page 141)

We anticipate that any member of the Governance Council can fulfill its requirements as well as have a full professional life beyond the Council. The work of the Council, including recruitment of its members, will typically occur outside of traditional business hours, and we will work to accommodate the various schedules of the Committee on meeting additional work needs.

B. Governing Body Training and Evaluation

B.(1)	<u>Governing Body Training Plan</u>
Rating	Expectations

Meets	<p>A complete response must</p> <ul style="list-style-type: none"> ● Identify a process for governing body member onboarding to ensure new members are properly trained and able to meet the obligations and fulfill the responsibilities of governing body service, include action & monitoring steps, timelines, and responsible parties; ● Describe how the plan will identify governing body training needs, meet governing body training needs, and comply with state requirements, including any requirements that may change from year to year; ● Identify any costs required to support the training plan or onboarding process and describe how those costs are supported in the budget; and ● Develop an onboarding process and training that all new board members will be expected to complete including an outline of topics, who will be responsible for onboarding new board members, timeline for onboarding, and procedure for gathering feedback on the effectiveness of the onboarding process. ● Ensure the onboarding process and training plan address training on the open meetings act and responsibilities.
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The Equip Academy of New Mexico founding team’s response Meets the expectations for this section.

B.(2)	<u>Governing Body Self-Evaluation Plan</u>
Rating	Expectations
Meets	<p>A complete response must</p> <ul style="list-style-type: none"> ● Identify a plan for annual governing body self-evaluation, include action steps, timelines, responsible parties, timeline on the annual board calendar and identified criteria or standards; and ● Describe how the identified plan will focus on and support continuous improvement.

The Equip Academy of New Mexico founding team’s response Meets the expectations for this section.

C. Leadership and Management

C.(1)	<u>Governing Body Plan for Monitoring Outcomes</u>
Rating	Expectations

Approaches	<p>A complete response must</p> <ul style="list-style-type: none"> ● Identify a plan for how the governing body will monitor academic performance on an ongoing basis, include action steps, timelines, responsible parties, and identified criteria or standards; ● Identify a plan for how the governing body will monitor organizational performance on an ongoing basis, include action steps, timelines, responsible parties, and identified criteria or standards; ● Identify a plan for how the governing body will monitor financial performance on an ongoing basis, include action steps, timelines, responsible parties, and identified criteria or standards; and ● Describe how each of the monitoring plans will focus on ensuring the school is meeting its mission, providing a quality education, and acting as a responsible public entity. ● Describe how all of the above will be reflected in meeting agendas and the annual board calendar
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The Equip Academy of New Mexico founding team’s response Approaches the expectations for this section.

The following concerns were noted by the review team:

- The plans for Organizational and Financial monitoring need to be more robust. Timelines and action steps are not included in either.
- Financial monitoring should include more such as bank statement reconciliation, internal controls, etc.
- The narrative does not describe how each monitoring plan will focus on meeting the mission and providing a quality education.
- The response gives a summary of how meeting agendas will be set and a description of the calendar but does not tie either into monitoring as prompted.
- Regarding the governing body monitoring the financial performance of the school, other reports that should be reviewed are Journal Entries, Bank statements and reconciliations, Payroll reports and quarterly reports to the PED (cash report)

In addition, the narrative states that the Governance Council members will do the audit of the school finances (page135) which is not their responsibility. The PED recommends an audit firm to do the school financial audit – which is not stated in the application. The Governance Council through the finance committee provides an update monthly on fiscal issues (e.g. bank balances, BARs, purchases, revenue and expenditures). The reports are provided by the business manager and shared at the monthly Governance Council meeting. There is no salary line item in the budget for a business manager. There is \$43,000 listed as “other services” in the budget but it is not indicated for business manager services.

RESPONSE – Organizational and Financial Monitoring Timelines and Action Steps

Factual error or misunderstanding (page 150)

As noted on page 150 in this section: Financial Performance Monitoring: The Equip Academy Finance Committee, chaired by the Board Treasurer, will closely monitor the financial performance of the school and report to the Governing Board at each regular monthly Board meeting. Each Board

member will receive and collectively review documentation including a balance sheet, cash flow statement, income and expense statements, and a report of the school's budget versus actual expenditures. The Finance Committee will work with the Head of School, Business Manager, and appropriate members of the school administrators to ensure all reports are ready for review each month and are timely, accurate, and comprehensive. These reports will be straightforward and easy to understand; we will provide annual training in the area of the school's finances, important to ensure that all Board members, regardless of their area of expertise or role on the Governing Board, understand the school's financial standing and performance and thus are to ensure the school's financial health along with its compliance with laws, rules, and charter terms.

Guided by the Public Education Commission Performance Review and Accountability System, the Governing Board will evaluate the following:

- **Days of Cash on Hand.** Equip Academy has the cash readily available to pay all of its bills that meet or exceed PEC expectations
- **Annual Financial Audit.** Equip Academy meets basic expectations of financial oversight by following the Generally Accepted Accounting Principles (GAAP), financial management, and internal controls
- **Financial Reporting and Compliance.** Equip Academy and its Governing Board effectively develop and approve its budget and meet all financial reporting and compliance requirements, demonstrating the ability to oversee public funding designated for New Mexico students
- **Fiscal Oversight.** Equip Academy and its Governing Board effectively provide fiscal oversight by establishing, approving, and monitoring annual budget execution
- **Enrollment Variance.** Budgeted enrollment is based upon accurate enrollment assumptions, requiring only small or no budget revisions, resulting in a sound budget
- Financial monitoring should include more such as bank statement reconciliation, internal controls, etc.

Board Tentative Meeting (includes dates for financial monitoring)

- August 22, 2024
- September 19, 2024
- October 24, 2024
- November 14, 2024 *Thanksgiving holiday is third Thursday; this date is the week prior
- December 19, 2024
- January 23, 2025
- February 20, 2025
- March 20, 2025
- April 24, 2025
- May 22, 2025
- June 19, 2025

RESPONSE – Financial Monitoring

Clarification (pages 150-151)

This section in the charter application touches on the financial monitoring as stated above in a broad sense. Below are clarifying details.

Annually

- The HOS will work with the back office to ensure the school is compliant and fiscally sound based on the mission and vision of the school
- In January of each year, the annual school budget with the support of the back-office financial provider will be submitted, ensuring that the budget has sound and full assumptions, is conservative and balanced, and addresses all of the needs and priorities of the school. In February, the drafted budget to the Board's Finance Committee, chaired by our Treasurer. The budget will be examined, ensuring that expenditures are overestimated and only reasonably expected and secured revenue is expected. We will go through an iterative process to ensure that the budget is ready for review by the full board within a regular public board meeting, typically by March or April of each year. The Board will review the budget, pose any questions they might have, and ask for any final revisions before they take a vote on the budget. We expect that the Board would approve the annual budget in May, and the HOS is responsible for executing its details at the school level.
- Annually, the HOS will support the work of the Audit Committee, ensuring it has all of the resources it needs to audit the financials of the school.
- Finally, the HOS will present to the Board any proposed contractual needs (i.e., nutrition, transportation, cleaning company) for the upcoming year, and work with the Board to ensure that it has the information it needs to make a sound decision regarding approval of each contract.

Monthly

- Each month, the HOS will work with the back office provider to ensure the school has prepared all financial details for review by the Board, including all projected versus actual budgets and cash flow statements, and including any explanations for discrepancies between them. The HOS will ensure that the Board receives these financials each month in the Board packet, send to the Board one week in advance of the Board meeting, and to be fully available both to the Finance Committee as well as to the Board, both at their meetings as well as beyond the meetings as may be needed.
- With the back office provider's support, the HOS will present to the board all monthly budget items that show all financials to date including bank statement reconciliations, internal controls, balance sheet, cash flow projected versus actual) and ensure that we have adequate cash reserves at all times.

RESPONSE – Monitoring Plan, Mission, and Quality Education

Factual error or misunderstanding (pages 148-149)

As stated on pages 148-149, we will monitor our plan, mission and quality of education in the following ways:

Equip Academy's model is rooted in high standards for its students, staff, and overall school performance. Frequent and reliable measurement and monitoring of the school's academic, organization, and financial performance is imperative to ensure that we are (a) fulfilling the charter's promise of high-quality instruction and important supports to its students and its broader school community, (b) implementing operations in full compliance with all federal and state requirements and supportive of our joyful and ambitious schools community, and (c) managing public dollars with unblemished integrity and fully aligned to our mission. To do so, Equip Academy will be guided by the Public Education Commission Performance Review and Accountability System.

Academic Performance Monitoring

At least four times each year, and more frequently as needed, the Governing Board will review student academic performance data in-depth to ensure the school is satisfying all requirements named in the Public Education Commission Performance Review and Accountability System, and delivering on its promises to the Equip Academy school community. This calendar will begin with the Governing Board dedicating prioritized time at its Annual Meeting retreat each July to review last year's academic performance and to set goals and priorities for the next academic year. All student data will be compiled, furnished, and presented by the Head of School and all data will be presented to show longitudinal growth, disaggregated by subgroups, including ELs, students with disabilities, gender, and all other state-identified subgroups.

More specifically, at the end of each quarter of the school year, the Head of School will present data and detailed analysis to the Governing Board on the following:

- Proficiency and Growth
 - Reading and math proficiency rates by grade, as measured by short-cycle, interim, and state-mandated assessments
 - Growth in reading and math proficiency rates by grade, as measured by short-cycle, interim, and state-mandated assessments
 - Note: These data points will be considered not only at face value, but also against goals set for proficiency and growth
- Outcomes for Student Groups
 - Proficiency and growth for student groups including English language learners, special education students, Hispanic students, Native American students, and at-risk students in Multi-Layered System of Supports (MLSS)
- Participation
 - Attendance data to ensure Equip Academy of New Mexico complies with statewide assessment requirements
 - This data will also be evaluated for trends that may demonstrate efficacy of student and family supports and needs
- Education Program Implementation – overview of implementation status of all core academic elements, professional development priorities, and family engagement initiatives

At the end of each academic quarter, the Governing Board will evaluate progress toward academic goals, taking into consideration any recommendation of “course adjustments” from the Head of School.

RESPONSE – Meeting Agendas and Monitoring

Factual error or misunderstanding (page 150)

The reviewers' comments state that this criteria is satisfied.

However, to fully address the reviewers' broader comment, we provide the following.

As stated on page 150, and the timeline as seen above, below details our Agendas and the Annual Board Calendar

The Governing Board will abide by all requirements laid out in the Open Meetings Act relating to the development and publicization of its meeting agendas (NMSA 10-15-1). All regular and special Governing Board meeting agendas will:

- Include a list of specific items the Governing Board will discuss or act upon in the course of the meeting, and clearly describe each of them in plain, straightforward language.
- Except in the case of an emergency meeting, the agenda will be made available to the school community and broader public one week prior to the meeting. The Open Meetings Act requires at least 72 hours; this longer runway is designed to enable families to arrange for childcare, transportation, or other considerations.
- Except in the case of emergency matters, the Governing Board will act upon only those items specifically listed on the agenda one week prior to the meeting.

Regular Board meetings will be scheduled for the Thursday of the third full week of each month at 5:00pm, except where that date may fall on an observed federal holiday or during a holiday break for the school. In these cases, the date may be set for the second or fourth Thursday instead. Upon charter authorization, the Governing Board will formally set the Board meeting schedule for the remainder of the 2024-2025 year. The full year's Board meeting schedule will then be posted on the school's website. Assuming charter approval, below is an example schedule:

Upon approval, the Founding Board will meet on August 22, 2024 to make official all set forth initial obligations. At the September 19, 2024 meeting, the Governing Board will set the date for the July 2025 Annual Meeting retreat, where the 2025-2026 year's Board meeting schedule will be set.

In the interest of (a) transparency with and (b) accountability to the school community, the Governing Board will publish quarterly updates to share high-level news and decisions through the school newsletter. These updates will contain news on the Board's activities over the previous 3-4 Board meetings; they will be brief and in plain, straightforward language - without unexplained acronyms or technical terms - to facilitate understanding. These updates will also be readily available in Spanish. Not all families may be able to attend Governing Board meetings, but they should still have the relevant and timely information they need to stay informed on the health and activities of their school.

RESPONSE – Monitoring Financial Performance

Clarification (pages 1501-151)

The Governing Body is responsible for the financial performance of the school. As such, each month the Board will review a number of financial documents, including but not limited to, Journal Entries, Bank statements and reconciliations, Payroll reports and quarterly reports to the PED (cash report). They will also review projected versus actual budget details to date as well as projected and actual cash flow and preview impacts on the upcoming three-month period. All financial monitoring is critical to the success of the school, as we manage public dollars ethically and soundly, in alignment with our vision and goals, and allow for the short- and long-term viability of the charter school.

RESPONSE – Additional Items

Clarification (pages 1501-151)

As recommended by the PED, an audit firm will conduct the annual financial audit of the school.

Factual Error or misunderstanding (Budget Details)

The business manager is fulfilled by the contracted relationship with the proven and experienced financial back-office provider K12 Accounting. The cost for those services can be seen in line item 340.

C.(2)	<u>Plan for Hiring Head Administrator</u>
Rating	Expectations
Meets	<p>A complete response must</p> <ul style="list-style-type: none"> ● Identify an ongoing process for hiring a head administrator, both for the initial hiring and for any time the position becomes vacant, include action steps, timelines, responsible parties, and identified criteria or standards; ● Identify all leadership characteristics and all qualifications the head administrator must possess; ● Explain why and how the identified leadership characteristics; including educational background, experience and qualifications will ensure the head administrator has the required capacity and enable the head administrator to operate the proposed school as a successful, high-quality public charter school ; ● Explain how the identified leader, both for the initial hiring and for any time the position becomes vacant, will be on boarded including setting the expectations of how they will be reporting to, and working for and with the board. ● Describe how the identified process will ensure the school is able to identify and equitably (openly advertise and interview multiple candidates) hire a highly qualified, licensed administrator ; and ● If a potential head administrator has already been identified and/or is a founder, include an assurance that the individual understands they must be selected and hired by an independent governing body and identify the individual’s specific leadership skills and qualifications, through verifiable prior experience, that makes them qualified for the position, including holding the required licensure.

The Equip Academy of New Mexico founding team’s response Meets the expectations for this section.

C.(3)	<u>Distinguished Roles & Responsibilities</u>
Rating	Expectations

Approaches	<p>A complete response must</p> <ul style="list-style-type: none"> ● Identify the process the governing body will use for distinguishing their roles and responsibilities with those of the head administrator; ● Include specific actions the governing body will take to ensure the head administrator understands the obligations of the charter contract, the boards' role in oversight and chartering, and the requirements of all elements of the plan contained in this application; and ● Attach a job description in Appendix B that includes the following: <ul style="list-style-type: none"> ○ Lists all major responsibilities of the head administrator ○ Includes responsibilities that are unique to charter school leaders ○ Includes responsibilities that specifically relate to the school's mission, goals, and educational philosophy ○ Identifies all hiring requirements including all previously identified requirements related to characteristics and qualifications.
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The Equip Academy of New Mexico founding team's response Approaches the expectations for this section.

The following concerns were noted:

- The job description should include monitoring the Performance Framework of the chartering document. It should also enumerate the requirement of board meeting attendance, etc.
- Minimum qualifications do not require a license or move toward licensure.
- Compensation is undefined only saying it is based on experience and a generous benefits package.
- Job description does not include responsibilities unique to charter school leaders.
- Job description does not align with description in C. (2).

As written, the response does not ensure the Head of School will understand all obligations. In particular, the Head of School would not understand the extensive requirements to operate a charter.

RESPONSE – HOS Compensation

Factual error or misunderstanding (page 156, APPENDIX B)

It is our experience that typically precise compensation numbers are not found on job descriptions; we also do not believe compensation details were expected within this element. The salary as requested is within the budget documents, and not the job description.

RESPONSE – Responsibilities Unique to Charter School Leaders

Clarification (page 156, APPENDIX B)

Given that the HOS is noted as being responsible for all core aspects of the school program, we assumed that this satisfied the overarching expectation regarding responsibility for the Performance Framework. We have added that the HOS will be responsible for overseeing the Charter School Framework. As stated, the HOS will attend Board Meetings, and make monthly reports to the Board on the academic, fiscal, and cultural health of the school community. In addition, we have added that the HOS will provide all required documents and reports to the authorizer in a full and timely manner.

RESPONSE – Operating a Charter

Factual error or misunderstanding (pages 155-157)

As stated on pages 155-157 of the charter application:

The Head of School will be responsible for day-to-day school management, including oversight of its personnel, facilities and resources, and educational programming; the Governing Board’s purview includes long-term strategic vision, policy decisions, and oversight for accountability purposes, while the Head of School is responsible for all management functions, including the execution of the mission and goals laid out in the charter, as approved. The Board will delegate all management responsibilities and decisions to the Head of School, and the Head of School will be the only school role to report to the Board. As Equip Academy’s administrative leader, the Head of School will oversee all instructional and operational elements, and will be responsible for all staff recruitment, hiring, training, and retention to establish and maintain a student-focused culture where students can learn and thrive. The Governing Board will hire, evaluate, and support the Head of School; the Head of School will report to the Governing Board, and is the only school employee to do so.

Clarification (pages 155-157)

In response to this concern: The HOS understands educational policies, ensuring compliance with all state and federal laws and regulations. The HOS understands or has experience with maintenance, operations, payroll, food service, and transportation. The HOS understands records and file-keeping, including assessment results, test scores, discipline referrals, medical reports and records, and other student documents.

C.(4)	<u>Head Administrator Evaluation Plan</u>
Rating	Expectations
Approaches	A complete response must <ul style="list-style-type: none">• Identify the plan for annually evaluating the head administrator, including action steps, timelines, responsible parties, and standards or criteria including how this will be maintained in the boards’ annual calendar process;• Include action steps to evaluate the effectiveness of the head administrator• Describe how the plan specifically takes into account ensuring the equitable implementation of the mission and goals of the proposed school; and• Ensure the plan meets the requirements identified in NMAC 6.69.7.8 and 6.69.7.9.

The Equip Academy of New Mexico founding team’s response Approaches the expectations for this section.

The following concerns were noted by the review team:

- As part of the Head of School evaluation, feedback from staff should be included. Additionally, staff retention should be evaluated, especially resignations, to assure that the Head of School is a "good boss". They should also look at the satisfaction of families... have there been complaints by families, are students leaving, etc.?

RESPONSE – HOS Evaluation Plan and Equitable Implementation of Mission and Goals

Factual error or misunderstanding (pages 158-159)

One of the key metrics in the HOS Evaluation Plan is the measure of students' academic growth in alignment with our Performance Framework and Goals. These metrics will be disaggregated by subgroups, allowing the Board to examine the equitable implementation of our mission and goals. In addition, as part of our annual survey of families, the survey will ask the respondent to identify, should they choose, their racial and ethnic group, home language, and whether their child is receiving special education services or is identified as an English learner. This will allow the Board to have a window into any disparities across groups that may exist regarding the equitable implementation of our mission and goals.

RESPONSE – HOS Responsibilities

Clarification (pages 158-160)

Thank you for the opportunity to clarify our intent regarding the various responsibilities of the Head of School.

The Head of School will be the instructional leader of the school; that role is charged with making all hires and leading the professional development program of the school. The HOS will lead much of this PD, but will also include additional resources and providers, as appropriate, including curriculum training provided as part of the curricular purchases and contractual details. As the instructional leader, the HOS is the leader of the assessment program as well, leading the data analysis program and training all members of the instructional team to analyze and action plan effectively from data to improve instruction, inform student supports, and grow student achievement. There are several aspects to each of these areas that have operational requirements, and the HOS will be supported by various staff members on the operational team, as they will take on the "non-instructional" components and allow the HOS to focus on the teacher training and instructional leadership needed for school success.

Per special education and EL identification and testing, we envision that as a slow growth school starting with 75 students and a small staff, the HOS will set the vision and processes for these elements in the first year particularly, and then will train up and delegate to appropriate staff members such duties, and then in Y2 and beyond moving into a managerial role appropriate to the HOS.

Per the financial requirements of the senior leader of the school, the HOS will set and oversee all school-based financial decisions but will rely on the strong services of K12 Accounting as they will function as Business Administrator and Assistant Business Administrator, preparing all financial documents and managing the financial program's details under the oversight of and in response to the needs of the Head of School and Board.

Per the daily operations of the school, and as seen in our organizational chart, the HOS will manage the senior member of the operations team, who will manage the other roles on the team, to ensure that all operational details of the school are being handled successfully.

Per each item here, we will therefore clarify the identified bullets in the following ways:

- Hire staff and provide professional development for new staff.
- Oversee the assessment program and analyze disaggregated data with teachers, ensuring that the instructional team can effectively inform instructional decisions through data
- Ensure the effective implementation of the IEP TEAM process and ensure that all students eligible for special education services are receiving appropriate instruction and services
- Ensure the effective implementation of all English language testing and that all students eligible for EL services receiving appropriate instruction and support
- Work with the Business Administrator to ensure the completion of all monthly financial reports and the timely and full provision of these reports to the Governance Council at each meeting
- Manage the senior leader of the operational team to ensure effective day-to-day operations of the school

D. Organizational Structure of the Proposed School

D.(1)	<u>Organizational Chart</u>
Rating	Expectations
Approaches	<p>A complete response must</p> <ul style="list-style-type: none"> ● Include an organizational chart for each year as part of the rollout with grade additions; ● Show how the Equity Council is incorporated into to organizational chart; ● Include a narrative that describes the structures and relationships represented in the organizational chart; ● Include all entities essential to the operation and success of the proposed school; and ● Describe the relationship among each of the relevant entities.

The Equip Academy of New Mexico founding team’s response Approaches the expectations for this section.

The following concerns have been noted:

- The org chart infers that the Equity Council also oversees the Head of School as it is in the same box as the Governing Board. (Page 160 - 164 in the application)
 - The org chart denotes that the Special Ed teacher and the Enrichment Teacher will be contracted in the early years, but teachers are required to be employees. It appears in the budget that those positions could be in the budget years 3, 4 and 5.
 - The narrative states the Office Assistant will be a contract position. This goes against IRS Statute and must be an employee.
 - The Education Coordinator sounds more like a Special Education Director.
 - Is a Director of Operations really needed? This position appears to be another layer of administration, and administration costs should be limited.
 - The organizational chart is present for all five years, but the relationship of employees and when they will be hired is not appropriate for this school population.
- The Culture and Equity Council is listed as part of the Governing Board but their role is not clear. Are they part of the Governing Board? Is this another layer of the Board that has decision-making responsibilities? The chart indicates that the Culture and Equity Council makes decisions.

In addition:

- There seems to be many contracted positions that are hired in Year 3, 4 and 5. It appears that the Head of School will be responsible for the work of the positions not contracted, e.g. ancillary staff are not hired until year 5 and they are given the responsibility to monitor all students and not just students eligible for services based upon their IEP

RESPONSE - Org Chart and Equity Council

Factual error or misunderstanding (pages 160–161)

Thank you for this opportunity to address what appears to be a misunderstanding.

The Culture and Equity Council does not oversee the Head of School. As a school, we wanted to highlight and visualize the importance of having an Equity Council and its ability to be a stakeholder in decision-making on behalf of our diverse student population. The org chart as ultimately approved by the Board will have dotted lines from the Equity Council to the Board and another dotted line from the Council to the Head of School, as dotted lines signify advisory and not managerial relationships.

RESPONSE - Office Assistant (page 161)

Factual error or misunderstanding

In the event that our enrollment is lower than anticipated, we will hire a contracted Office Assistant. The Office Assistant will be a W-2 employee of an established agency, fulfilling all IRS requirements. We will contract with the agency itself, thus fulfilling legal requirements.

RESPONSE - Education Coordinator

Factual error or misunderstanding (pages 163-164)

The Education Coordinator has a similar role to that of a Special Education Coordinator, however, in addition to overseeing and monitoring special education services, this position will also oversee assessment logistics and details.

RESPONSE - Director of Operations

Factual error or misunderstanding (page 164)

Equip Academy has budgeted for a Manager of Operations, which will allow the Head of School to focus on instructional leadership which is key to our mission, vision, and goals. We will only hire this position based on need and fiscal allowance. If our operational team is running efficiently without this role, there will be no need for a Manager of Operations. As a slow growth school, however, we recognize the various operational needs that will grow as enrollment grows, and if at all possible, we intend to staff this position from within.

RESPONSE - Contracted Positions and Role Responsibility

Factual error or misunderstanding (Budget Details)

The school has prioritized budgeting funding in 2100 object 53218 for hiring a company through ACES or CES that works with many other charters to provide oversight of SPED services starting in year 2. However, the Head of School as the instructional leader of the school, including the education provided to our students with special needs, will also be responsible for observing the work of the ancillary staff and will work alongside the SAT team to monitor students growth as well as the IEP process and eligibility. A Education Coordinator will be brought in earlier (year 3) to lead the SAT team and monitor support for our special populations.

D.(2)	<u>Job Descriptions for Certified/Licensed Staff</u>
Rating	Expectations
Does Not Meet	<p>A complete response must</p> <ul style="list-style-type: none"> ● Identify the following: <ul style="list-style-type: none"> ○ all certified and licensed staff identified in the application ○ all non-certified or unlicensed staff identified in the application who could be considered essential to the operation and success of the proposed school ○ any non-traditional roles or positions; ● Describe why the identified roles are key to the operation and success of the proposed school; and ● Attach staff job descriptions as Appendix C for all of the positions identified in the application response and include the following: <ul style="list-style-type: none"> ○ List all major responsibilities of the positions ○ Include responsibilities that specifically relate to the school’s mission, goals, and educational philosophy ○ Identify all hiring requirements including qualifications and licensure or certification ○ Identify reporting lines (“reports to”) that align to the organizational chart.

The Equip Academy of New Mexico founding team’s response Does Not Meet the expectations for this section.

The following concerns have been noted:

- The narrative does not describe why the identified roles are key to the operation and success of the school as included in the expectations for this section.
- Job descriptions are included for all staff although many of the job responsibilities are not appropriate for several of the jobs listed.
- Licensure is not consistently required in the job descriptions and many non-instructional staff do the same jobs without any licensure.
- The role of the Special Education teacher in the school goes beyond their license: they are responsible for Special Education services and not EL services, nor are they responsible to manage the budget except as it relates to Special Education.
- Many of the job descriptions do not include PED Licensure requirements. The Social Worker job description also does not include NM Boards and Licensing requirement.
- SPED Teacher and Enrichment Teachers are described for the first two years as contractors and more enrichment teachers as contractors in later years. The IRS will not allow positions primary to the business to be contracted, such as teachers. They require them to be W-2

employees with benefits. They will not be able to have some SPED teachers and Enrichment teachers as W-2 employees and others as contractors.

- Instructional Assistants job description indicates they will be teaching and assessing students. Instructional assistants are not licensed to teach students, only assist under licensed teachers. In the narrative they claim they want to promote from within, but they must be careful that their job descriptions do not assign duties to employees who are not licensed to perform them.

In addition:

- A job description for a "Dean of Culture" is included; however, there is nothing in the budget for this position.
- The job description for Instructional Assistant appears to be the same as the Lead Teacher.
- It is unclear why the Office Manager only needs a high school education, but the Office Assistant, who is supervised by the Office Manager, has a BA or MA preferred?
- The job description and minimum qualifications for the office manager and office assistant are longer than that of the Head of School and teachers. Same with the office assistant.
- Figure 81 does not have a Special Ed Teacher for year four or five.
- Instructional Assistants (Educational Assistants) require a license.
- Figure 82 has three (3) Instructional Assistants for year 1, but the budget only budgets for two (2).
- Figure 82 does not have an Office Manager for year 5.
- The Enrichment Teacher also requires a license.
- Business managers must also be certified.
- Instructional Assistants report to the Head of School but should be supervised by the teacher they work under.
- The staffing pattern includes an Assistant Principal in Residence and an Assistant Principal. Their jobs are basically the same except for grade levels. They are not hired until Year 3 and beyond. It appears that the Head of School handles their job until they are hired?

The application states that the Founding Team transitions into the Governing Board. Governing Board members are not allowed to take over school operations as they are not licensed staff. Governing Board responsibilities are to hire and evaluate the Head of School and to provide approval and oversight of the finances of the school and school policy.

RESPONSE – Identified Roles and Mission Success

Clarification (pages 164-171)

Equip Academy's proposed staffing structure is designed to meet the needs of our students and their success. This staffing selection will allow us to fulfill our resource- and literacy-rich program model through ensuring a highly trained and functional staff. All positions are critical to our academic, cultural, operational, and financial success. This staffing growth plan will meet the needs of our student population on the Westside and the roles identified below are critical to the operation and success of our school and will ensure that we are able to meet the needs of all students.

- The Head of School ensures mission success by ensuring well selected and implemented curricula including family students and teachers, hiring, training and supporting teachers for effective outcomes in the classroom and a full team for all non-instructional needs.
- Business Manager/Assistant Business Manager (fulfilled by K12 Accounting) ensures mission success by providing the Head of School and the Board with all the financial resources for

healthy financial decision-making, adherence to all applicable regulations, creation and management of all required financial documents, and ensuring financial resources for our academic program.

- Lead Teachers ensures mission success by discussing, preparing, practicing, and immersing themselves in rich academic content through an inquiry-based lens, wear the hat of a facilitator and truly listen to what students are saying, creating a space for students to think their way through to answers, praising their insights and curiosities along the way, and ensuring strong academic growth for every student every year..
- Special Education Teachers ensure mission success by providing direct support and modified instruction as needed to students with IEPs for strong and measurable progress toward achievement and success.
- Instructional Assistants ensure mission success by providing more support to lead teachers in the classroom, always focused on student success.
- Operations Team (Office Assistant, Office Manager, Manager of Operations) ensures mission success by managing all non-instructional elements of the school, ensuring that the Head of School can focus on students and teachers and the overall success of the academic program.
- Assistant Principal in Residence/Assistant Principal ensures mission success by growing into the instructional leader role when the school reaches maximum capacity.
- Education Coordinator ensures mission success by overseeing special education services, ancillary services and testing accommodations and logistics.
- Enrichment Teachers ensures mission success by providing a rich set of extracurricular and cultural enriching opportunities and experiences to our students.

For each role, a job description can be found in Appendix C.

RESPONSE – Job Responsibilities

Clarification (pages 164-171, 166-169,)

Should this concern be related to the various office roles, please see the response provided in D.(2) Job Descriptions for Certified/Licensed Staff. (pages 166-169)

Should this concern be related to lead teachers and instructional teachers, please see the response provided in D.(2) Job Descriptions for Certified/Licensed Staff. (pages 166-169)

If additional detail is needed, examples are needed for a fuller response.

RESPONSE – Special Education Teacher Responsibilities

Factual error or misunderstanding (page 166)

We appreciate the opportunity to clarify what seems to be a misunderstanding.

As stated in the application:

Special Education Teacher: Ensure all identified students with special needs (including gifted students) receive support, have a wide scope of knowledge of special education best practices, parent and family engagement, and evidence-based practices for teaching as well as social, emotional, and behavioral support. Student Assistance Team (SAT).

The Special Education Teacher will not be responsible for the EL program.

The Special Education Teacher will not be responsible for managing budgets. They are allowed to request to purchase items that will support their students.

Enrichment providers are not traditional teachers and do not teach in our core academic program content areas. As a small, slow-growth charter school, and as implemented in similar schools in NM, we will hire a part-time professional through an organization such as the National Institute of Flamenco, who will provide enrichment services per agreed-upon contractual needs. This individual will hold proper certification for this role.

RESPONSE – Teaching Assistant Responsibilities

Clarification (page 169, JOB DESCRIPTIONS)

Our goal is to hire instructional assistants who are on track or desire to be on track to earn their teaching degree. We will ensure that all assistants work with the lead teacher in support of student success.

RESPONSE – Dean of Culture

Factual error or misunderstanding (JOB DESCRIPTIONS)

It is correct that the Dean of Students role is not included in the budget, as this role will not be brought on until Y6. We have included the job description to provide a full picture of staffing needs once the school is at full scale. The narrative includes the following: “NOTE: This role is not in the budget because it will be introduced year six (6) at full enrollment during year six (6)”

RESPONSE – Lead Teacher and Instructional Assistant Job Descriptions

Clarification (JOB DESCRIPTIONS)

We have updated the job description for Instructional Assistants to indicate they will assist in all instructional and assessment duties under the guidance of a Lead Teacher or Administrator.

RESPONSE: Job Description Details

Factual error or misunderstanding (JOB DESCRIPTIONS)

With operations, there are quantitatively a lot of tasks involved in the day-to-day of operations. The Head of School and Teachers have very specific roles to educate children which has a lesser “laundry list” of duties. We did not mean to infer by such quantification that the operational roles have more responsibilities than the instructional leader or teachers, but rather to make clear the many smaller tasks to which they will be assigned. We apologize for any unintended confusion that might have created.

RESPONSE – Special Education Teachers in Y4 and Y5

Factual error or misunderstanding (BUDGET DETAILS)

We include Special Education teachers across all 5 years of the charter term (please see Function: 1000 and Object: 51100in budget details).

RESPONSE – Instructional Assistant Licensure

Clarification (JOB DESCRIPTIONS)

Equip Academy will ensure all Instructional Assistants have a state mandated license prior to hiring for the role, and we will update all job descriptions to include such requirements.

RESPONSE – Office Staff Year 5

Factual error or misunderstanding (BUDGET DETAILS, page 172)

In Year 5, we will have a full operational staff to ensure all aspects of day-to-day operations are completed timely and efficiently. We will take into consideration the need of a Manager of Operations is needed during Year 4 in preparation of Year 5. We may dissolve and no longer need the Office Manager position given the increased operational needs of the school at this stage of growth.

RESPONSE – Enrichment Teacher Licensure

Factual error or misunderstanding (page 169)

Enrichment professionals are not traditional teachers. We intend to hire through professional organizations such as the National Institute of Flamenco, who will provide enrichment services with agreed upon contracted needs; we will ensure that any roles, including enrichment teachers as hired, will carry all required licensure given their duties and responsibilities.

RESPONSE – Business Manager Certification

Factual error or misunderstanding (page 171)

The Business Manager at Equip Academy will carry all required certification. As indicated in the application on page 171, “Business Manager Reports to K12 CEOs and HOS | New Mexico School Business Official License.”

RESPONSE – Supervision of Instructional Assistants

Factual error or misunderstanding (page 169)

In a district or traditional school lead teachers often bring multiple years of experience; we do not anticipate this degree of experience in our teaching staff, whom we expect in many instances will be first and second year teachers. We do not believe it is appropriate for less experienced teachers to supervise instructional assistants. Grade Team Leads will support and mentor their grade team, including the Instructional Assistants, however, this will not be a supervisory role. Should a Lead Teacher come with more experience, or develop such over time while with us at Equip Academy, we can include such supervision within their job details.

RESPONSE – Assistant Principal in Residence and Assistant Principal

Factual error or misunderstanding (page 167)

The APIR and the AP are (ideally) the same person (as seen on Line Item 266), with the person in the residence role will transition to the AP role the following year. The Head of School will handle the leadership duties until then, and is appropriate to the size of the school during our early slow growth years, with 75, 150, and 225 students, respectively, across Y1, Y2, and Y3. Our school is a responsive, need-based model. If there is a need for an APIR prior to year 3 with a potential candidate, we will reconsider and bring them in earlier.

RESPONSE – Governance and Management

Factual error or misunderstanding (page 167)

Equip Academy recognizes and respects the separation of governance and management and the clear oversight role of the Board, with all management responsibilities for the school delegated fully to the Head of School. The Founding Board will not “take over school operations” in any way. A quote to reference is required in order to more fully respond to this comment. We agree and will fully adhere to the clear distinctions between governance and management, specifically with the Governing Board’s responsibilities being to hire and evaluate the Head of School and to provide approval and oversight of the finances of the school and school policy.

D.(3)	<u>Staffing Needs and Plan</u>
Rating	Expectations
Does Not Meet	<p>A complete response must</p> <ul style="list-style-type: none"> ● Identify an ongoing staffing plan and process for hiring all necessary staff, both for the initial hiring and for any time a position becomes vacant, include action steps, timelines, responsible parties; ● Describe how the staffing plan and process will ensure the school is able to hire highly qualified staff, no later than two weeks prior to the start of the proposed school year, on an annual basis, and fill all vacancies within a reasonable time; include how the school will recruit and hire highly-qualified licensed staff; ● Describe how the staffing plan and process is reasonable and adequate to support effective and timely implementation of the academic program/curriculum during the planning year and for all subsequent years; ● Describe how the staffing plan and process is aligned with the budget and the school’s projected enrollment; and ● Describe how the school will make adjustments to the staffing plan in the case that there are differences in projected and actual enrollment.

The Equip Academy of New Mexico founding team’s response Does Not Meet the expectations for this section.

The following concerns have been noted:

- The Head of School's salary is below the minimum in the principal’s salary schedule for the first two years.

- The Education Coordinator's salary is below the minimum on the salary schedule for years 4 & 5.
- The Operations Manager's salary is below the minimum on the salary schedule for year 5.
- The Assistant Principal's salary is below the minimum on the salary schedule for assistant principals in year 4.
- Teachers cannot be paid as contractors.
- The applicant states in the narrative that enrichment teachers will be contractors, but they are required to be FTEs. In years 1 and 2 the Enrichment Teachers are not included in the FTEs; however, they are included as FTEs in years 3-5.
- In all years, there are more Educational Assistants in the staffing plan than in the budget.
- In year 1 the staffing plan states there will be 1 contracted Office Assistant. The narrative states there will be 1 office assistant and 1 office manager (OM starts in year 3), but only 1 FTE has been budgeted.
- The applicants' response states adjustments will be made if actual enrollment is different than projected but does not describe how.
- Overall, Figures 81, 82 and 83 were not in agreement on staff.

RESPONSE - Head of School Salary

Clarification (BUDGET details)

We apologize for this error. For clarification, in finalization of all budget details, we made small adjustments to some salaries; such adjustments were not reflected in the salary bands, which will be updated to align with all budget details. More specifically, the salary schedule will be updated to a minimum salary schedule to reflect the budget.

RESPONSE - Education Coordinator Salary

Clarification

We apologize for this error. For clarification, in finalization of all budget details, we made small adjustments to some salaries; such adjustments were not reflected in the salary bands, which will be updated to align with all budget details. More specifically, the salary schedule will be updated to a minimum salary schedule to reflect the budget.

RESPONSE - Operations Manager Salary

Clarification

We apologize for this error. For clarification, in finalization of all budget details, we made small adjustments to some salaries; such adjustments were not reflected in the salary bands, which will be updated to align with all budget details. More specifically, the salary schedule will be updated to a minimum salary schedule to reflect the budget.

RESPONSE - Assistant Principal Salary

Factual error or misunderstanding (page 167, JOB DESCRIPTIONS)

This role is an APIR = Assistant Principal in Residence. This role is an AP in training and therefore does not fall directly within this band, as the person in this role will be supported to receive their administrative licensure.

RESPONSE - Educational Assistants

Factual error or misunderstanding (BUDGET details)

This appears to be a misunderstanding. Please see funds 24101 and 24106 for additional staff Instructional Assistants.

RESPONSE - Office Staff

Factual error or misunderstanding (BUDGET details)

This appears to be a misunderstanding. Both positions are included in function 2400, the Office Assistant is included in object 1217 and the Office Manager is included in 1211.

RESPONSE - Budget Adjustments

Factual error or misunderstanding (page 175)

We will not be hiring positions until actual student counts are realized by enrollment. We will be reviewing actual versus projected enrollment and how it affects the budget weekly and only encumbering money if available due to student enrollment.

RESPONSE - Figure Agreement

Clarification - BUDGET details

Please see budget line funds 11000, 24106, and 26999 with function 1000 object 51100 for special education teacher(s) budgeted across the 5 years. Enrichment teachers are budgeted as contracted staff.

D.(4)	<u>Professional Development Plan</u>
Rating	Expectations

<p>Approaches</p>	<p>A complete response must</p> <ul style="list-style-type: none"> ● Identify an annual professional development plan with action steps, timelines, responsible parties, and associated costs <ul style="list-style-type: none"> ○ Describe how the plan meets state requirements and rules; and ○ Describe how the school will ensure professional development time is not used for routine staff meetings. ● Identify a mentorship plan for novice teachers, including action steps, timelines, responsible parties, and associated costs that meets the requirements of PED rules; and ● Describe how the annual professional development plan and the mentorship plan for novice teachers ensure the following occur: <ul style="list-style-type: none"> ○ are supported by the budget ○ support the implementation of the proposed school’s educational plan, mission, and performance goals ○ not only address required annual training, but are also tailored to address school- and teacher-specific professional development needs.
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The Equip Academy of New Mexico founding team’s response Approaches the expectations for this section.

A Mentorship program for novice teachers was not identified and support for a Mentorship program was not included in the budget.

The budget also has no money for professional development of teachers in the month before school starts in 2025-2026 and subsequent years have minimal funds for teacher training. All training is done by the Head of School and Assistant Principals who are only contracted part time. All professional development seems to be internally driven without the possibility of teachers going to outside conferences, etc.

RESPONSE – Mentorship

Factual error or misunderstanding (pages 178-179, 182)

As a new charter school, we anticipate that our inaugural teaching staff will overwhelmingly be first and second year teachers; the extensive support and training provided by the highly experienced Head of School, who brings a strong track record as a successful teacher, teacher coach, and instructional leader will serve in this capacity. In addition, the Grade Level Team leader will support teachers at the grade level. As we mature as a school and some of our teachers develop more experience, they may move into a mentoring role for younger teachers as they join our school community. No mentoring costs, beyond salaries, were appropriate or needed at the time of this charter submission.

RESPONSE – PD Budget

Factual error or misunderstanding (pages 178-182)

The PD held in the month before school starts will be conducted and led by the Head of School, who is experienced in leading professional development in several highly successful charter schools. This model of training in-house, through experienced instructional and cultural leadership, is a core element of many highly successful charter schools and is a unique element of this proposal. All major budgetary implications are assumed within salaries for the HOS and all other staff members per their contractual details and timelines. We will include PD from some curriculum vendors, but those costs

are included within the curriculum purchases themselves, and so are not delineated out separately within the budget. Given that we have built a prudent and conservative budget which allows for healthy excess revenue each year (please see Function: 2200 and Object: 53330), we can and will remain flexible, attentive and responsive to any external training that might benefit any of our teachers or other staff.

E. Employees

E.	<u>Employer/Employee Terms</u>
Rating	Expectations
Approaches	<p>A complete response must</p> <ul style="list-style-type: none"> ● Identify all primary classes of employees the school will employ (e.g., administrative, professional, term, contract); ● Include an employment policy and handbook ● Provide an explanation for onboarding new staff and re-training returning staff on the terms within the handbook and policy. ● Explain how the school, through the governing body and head administrator, will address employee unions and other school-specific employee representatives.

The Equip Academy of New Mexico founding team’s response Approaches the expectations for this section.

A staff handbook sample was provided as an attachment.

Possible concerns include the following:

- Overall, the complaint policy in the handbook is vague and incomplete. A concern is noted that the Handbook identifies that complaints about the Head of School should be taken to the general counsel. This is not an appropriate step.
- Included in the handbook narrative: "Benefits are deducted from the first two salary payments in each month, equaling twenty-four (24) increments throughout the calendar year". Only Insurance benefits fall into this statement. All other benefits are deducted from every paycheck.
- Regarding Family and Medical Leave: Small companies are exempt from the federal FMLA, but the school can develop its own, similar program.
- There was a one sentence description regarding employee unions stating the school "will not interfere". This could have been stronger, especially if the school decided to unionize.

The employee handbook furnished seems generally in order with the exception of the above.

RESPONSE – Complaint Policy

Clarification - Staff Handbook Attachment

The handbook is a sample and will be finalized upon charter approval. All handbooks and policies will be approved by general counsel to ensure and all steps are fair, appropriate and complete. The

Complaint Policy will ensure that if any complaints are regarding the Head of School that such complaints will be addressed by the Board in alignment with the policy’s procedures and timeline.

RESPONSE – Payroll Deductions

Clarification - (pages 183-184, Staff Handbook Attachment)

All benefits, including but not exclusive to insurance benefits, will be deducted from each paycheck within each paycheck period.

RESPONSE – Family and Medical Leave

Factual error or misunderstanding - Staff Handbook Attachment

According to the The U.S. Department of Labor, “Local educational agencies (including public school boards, public elementary and secondary schools, and private elementary and secondary schools, regardless of the number of employees)” are covered employers under FMLA, therefore we have included FMLA provisions in our Handbook.⁵

RESPONSE – Employee Unions

Factual error or misunderstanding - (Staff Handbook Attachment)

As stated in our application, we acknowledge and will respect the rights of employees to unionize should that be their intention.

F. Community/Parent/Employee Involvement in Governance

F.(1)	<u>Parental, Professional Educator, and Community Involvement in Governance Plan</u>
Rating	Expectations
Meets	<p>A complete response must</p> <ul style="list-style-type: none"> ● Identify school operation and governance structures that will provide the following: <ul style="list-style-type: none"> ○ A meaningful opportunity for parental input and participation ○ A meaningful opportunity for professional educator input and participation ○ A meaningful opportunity for community input and participation; ● Describe how the structures will facilitate parental involvement that will help advance the proposed school’s mission; ● Explain the role of the Equity Council in the governance and operation of the proposed school; ● Include assurances that the school understands it may not require family or parental support or involvement as grounds for accepting, not accepting, enrolling, dis-enrolling, or otherwise differentiating treatment of a student; and ● If the school plans to offer opportunities for parent support, explain the process of opting out for parents who are unwilling or unable to meet the proposed school’s support opportunities.

⁵ [Fact Sheet #28: The Family and Medical Leave Act | U.S. Department of Labor \(dol.gov\)](#)

The Equip Academy of New Mexico founding team’s response Meets the expectations for this section.

F.(2)	<u>Plan for Processing Concerns and Complaints</u>
Rating	Expectations
Approaches	<p>A complete response must</p> <ul style="list-style-type: none"> ● Identify a grievance process to receive and process concerns and complaints from the community, parents and families, and students that includes action steps, timelines, and responsible parties; ● Include a final step in the process that provides the grievant a meaningful opportunity to be heard by, and receive a response from, the governing body; if they are unable to obtain resolution from the head administrator; ● Describe how the process is transparent, fair, accessible to the community, and ensure a timely and meaningful response; and ● describe how the school will provide assurances that the school will additionally meet the specific legal requirements of the McKinney Vento and special education grievance processes.

The Equip Academy of New Mexico founding team’s response Approaches the expectations for this section.

Regarding complaints, the applicant states "...should file a written complaint to the Operations Lead staff member." This is not an identified position in the staffing plan. In addition, the narrative does not describe how the process is transparent, fair, accessible to the community, and ensures a timely and meaningful response.

RESPONSE – Complaints, Role and Process

Factual error or misunderstanding (pages 192-193)

This appears to be a misunderstanding and we appreciate the opportunity to clarify.

In regards to the position title, the “Operations Lead staff member” refers to the Office Assistant in Y1 and Y2, the Office Manager in Y3 and Y4, and the Manager of Operations in Y5.

The process is transparent as it provides clear and consistent processes for all individuals who want to make a complaint; the process is fair in that it (a) treats all complaints in equal fashion and (b) allows for two different roles on the school staff so that if the complaint is against the Operations Lead staff member then the individual bringing the complaint has a process that does not rely on either interaction with or reliance upon that individual. The complaint policy will be provided in hard and soft copy each year to all staff members at the start of each school year, and if a person is hired after the start of the school year will be provided upon their employment start date,, and any updates will be provided as they might occur and are approved by the Board. Finally, the process provides a timely and meaningful response as included in the application and provided below for your reference:

Formal Complaint Review Process. Upon receiving the formal complaint, the Operations Lead will do the following within 10 business days:

1. Conduct a formal review of the complaint
2. Investigate the complaint by conducting interviews for proper information gathering
3. Come to a conclusion based on review of complaint and investigation evidence (Head of School will co-sign on the conclusion based on presented evidence)
4. Attempt to resolve the complaint with a meeting with the complainant to present corrective or preventive solutions

We acknowledge that some grievances may require additional time to be resolved, however, our goal is to have a written summary of the complaint, review process and resolution within 20 days of the submitted formal complaint.

G. Student Recruitment and Enrollment

G.(1)	<u>Outreach & Recruitment Plan</u>
Rating	Expectations
Approaches	<p>A complete response must</p> <ul style="list-style-type: none"> ● Identify a prospective student outreach and recruitment plan, including action steps, timelines, responsible parties, and associated costs; ● Describe: <ul style="list-style-type: none"> ○ how the plan is tailored to ensure equal access to the school ○ why the plan is likely to attract a student body that is demographically reflective of the local community and school district; ○ provide a description of how the school will change recruitment plans and outreach if projected student enrollment is not reached ● Describe how the school will annually evaluate the effectiveness of the outreach and recruitment efforts in ensuring equal access to the school and attracting a student body that is demographically reflective of the local community and school district and how the school will use that information to make adjustments to the outreach and recruitment plan.

The Equip Academy of New Mexico founding team’s response Approaches the expectations for this section.

Planning year costs have been noted in the budget plan, under fund 26999, which included \$5,000 for advertising 23000-55400. The school had many recruitment ideas but did not address what they would do if their plans did not help them reach their projected enrollment. The school stated they would annually evaluate the effectiveness but was not clear on how they would do this.

The plan is also unclear as to how the proposed school will attract a student body that is demographically reflective of the local community. The application indicates that the school wants to attract Hispanic students and that is indicated in its recruitment focus. Enrollment must be conducted by lottery: The school can advertise that its lottery will be at the end of March. All students within Albuquerque Public Schools must have equal access to this school whether they reside on the westside of Albuquerque or not. All interested families/students who complete an application are given a number and the numbers are drawn equally for all interested families. There can be no preference for Hispanic families.

RESPONSE – Adjusting Recruitment Plans as Needed

Clarification (pages 197-198)

We had broadly outlined how we will adjust recruitment plans should we find ourselves falling short of our enrollment goals, with a specific focus on ensuring equitable access to all families.

For clarification:

Biweekly, we will review the impact of our enrollment efforts. We will not expend the total dollars at the start of our enrollment period, but instead be thoughtful about expending some monies when we begin and then make additional budgetary decisions on drawing down on these dollars based upon what works. We will look at which venues and approaches have yielded the most enrollment opportunities for families, and those which have yielded less interest. We will ask families to indicate how they heard about the enrollment opportunity and we will use that data to double down on the most effective methods of reaching families. For example, if we find that certain advertising approaches (i.e., lawn signs or advertisements in particular locations and venues) have yielded the most family interest, we will double down on those efforts. If we find that family interest comes from certain communities but not others, we will also expand our outreach work in those areas where families may be less informed about the opportunity of the charter school.

Second, after the enrollment period, we will review the process overall to capture both the learnings from that process and update the plans for the forthcoming year to ensure that we are consistently data-informed by this experience to ensure the widest and most equitable access for all families and to ensure that we meet all of our enrollment goals.

RESPONSE – Student Body and Demographics

Clarification (pages 197-198)

As a public charter school, all students will have equal access to the proposed school. We will conduct a lottery that has no geographic preference within Albuquerque and no preference for any racial or ethnic group. We will advertise the proposed school in local venues that allows families from across the city to be aware of the opportunity for the school, and we will provide such advertisements in English and Spanish.

Our lottery will follow all required elements, including assigning a number to each applicant and drawing names in a blind fashion by a disinterested member of the community to assign seats and establish an ordered wait list if there are more applicants than seats available. The lottery will be open to the public, but families will not be required or have any preference if they attend the lottery proceedings.

G.(2)	<u>Lottery Admission Process</u>
Rating	Expectations

Approaches	<p>A complete response must</p> <ul style="list-style-type: none"> ● Identify a plan to implement a lottery admission process if necessary, include action steps, timelines, and responsible parties; ● Describe each of the steps of the process to include the following: <ul style="list-style-type: none"> ○ Pre-lottery entry ○ Lottery ○ Post-lottery registration ○ Waitlist maintenance and entry; and ● Describe how the lottery process supports equal access to the school.
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The Equip Academy of New Mexico founding team’s response Approaches the expectations for this section.

The lottery process for this school states that after the March lottery is done and there is no waiting list then the school can recruit students on an ongoing basis – not necessarily through a lottery process. The lottery process must support equal access to this school.

In the timeline plan provided it is stated from “September 01, 2025 – January 01, 2026: Equip Academy accepts Intent to Enroll Forms.” This should have a different name as there should be a clear separation between lottery and enrollment. In the same section the narrative states, “. . . if a student has a sibling or if a founding member or staff member has a child who wishes to enroll (so long as the total number of students allowed under this preference constitutes only a small percentage of the school’s total enrollment.), this will be noted, and that child will receive a seat in their respective grade level.” There is no such stipulation as the one given in parentheses. The law does not provide any enrollment preference for founder members.

RESPONSE – Lottery and Equal Access

Factual error or misunderstanding (pages 198-199)

This appears to be a misunderstanding; we did not state nor did we mean to infer that our target community has any preference within the lottery process.

The lottery will provide equal access to the charter school. No preference for geography within Albuquerque or for any racial or ethnic groups will be established. The March lottery will be held regardless of the number of applicants, with each applicant receiving a number. Each number will be called by a disinterested member of the community, and each number will be assigned a seat. If there are more applicants than seats available, we will continue to draw each number and assign an ordered wait list should seats become available and notify each family in the sequence of this ordered wait list. If there are fewer applicants than seats available, we will still draw each number and assign seats to each applicant as it is drawn. We will then re-open the enrollment period for another month, and we will conduct an additional lottery in the same way for additional applicants, ensuring equitable access for families who learn about this school during the second enrollment period. We will continue this process each month as needed, following the same procedures, until all seats are filled.

RESPONSE – Lottery and Enrollment and Preferences

Factual error or misunderstanding (pages 198-199)

We had named the application expressing interest in a seat in the school “Intent to Enroll Forms” based upon practices and terms used at other charter schools as authorized within NM. We are open to changing this term to better ensure clarity of each step in the process – the lottery and enrollment.

Clarification (page 199)

In accordance with NM charter law, we will not provide any preference for “founders” and will update all language accordingly. However, we will provide preference for children of employees as required by NM Stat § 22-8B-4.1 (2023).

H. Legal Compliance

H.	Conflict of Interest Policy
Rating	Expectations
Approaches	<p>A complete response must</p> <ul style="list-style-type: none"> ● Provide a governing body conflict of interest policy that includes action steps, timelines, and responsible parties; ● Describe how the policy meets the requirements of New Mexico law addressing all areas of potential conflicts of interest; and ● Include all forms the governing body will or may be required to submit pursuant to the policy.

The Equip Academy of New Mexico founding team’s response Approaches the expectations for this section.

The applicant states, regarding nepotism: "Should an occasion arise where the best qualified person for a position is an immediate family member, the matter should be immediately referred to the Governing Board for consideration and guidance. If there is not a consensus, the Board Chair will refer to the PEC for guidance." NMSA 22-5-6 and 22-8B-10 PROHIBITS any family member of the board from being employed by the school. This can be waived for a family member of the Head of School. (The nepotism rule states that an employee cannot be related to a board member. Period. However, it can be waived for a family member.)

RESPONSE – Nepotism

Clarification (page 200)

This appears to be a misunderstanding, and we appreciate the opportunity to clarify this language, as our intention was to express full compliance with NMSA 22 5-6 and 22-8B-10. We did not intend the language of the application to refer to members of the Board members’ families, but rather to members of the Head of School’s family.

It is our intention and our affirmation here that in full compliance with NMSA 22 5-6 and 22-8B-10 no family member of the Board will be employed by the school. Further, it is our intention and our affirmation here that a family member of the Head of School may be waived by the Governing Board if it is shown that this individual is best qualified to fulfill that role beyond any other candidates.

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

I.(1)	<u>Essential Third Party Relationships</u>
Rating	Expectations
N/A	<p>A complete response must</p> <ul style="list-style-type: none"> ● Identify any third party relationships with specific, identified organizations that control or influence essential elements—including the existence, operation, curriculum, or instruction of the proposed charter school—that are required by a partner organization or any part of the application; ● Describe, in detail, the relationships; ● Describe why the relationships are essential or required, or how they control essential elements of the proposed charter school; ● If any such relationships exist identify the following: <ul style="list-style-type: none"> ○ The specific, identified organizations ○ Contact information for that organization ○ Specific individuals in the organization that will be associated with the proposed school; ● Describe all legal implications of the essential/required relationships, including the legal benefits and responsibilities of each party.
NOT APPLICABLE	

I.(2)	<u>Appendix D Attachment Formal Agreement Documentation</u>
Rating	Expectations
N/A	<p>A response is only required if relationships were identified in questions I.(1) A complete response must</p> <ul style="list-style-type: none"> ● Identify all MOUs or formal agreements that are attached in Appendix D; ● Include proposed formal agreements or MOUs that are signed in Appendix D; and ● Identify the responsibilities, activities, and costs of both sides.
NOT APPLICABLE	

J. Transportation and Food

J.(1)	<u>Transportation Plan</u>
Rating	Expectations

Approaches	<p>A response is only required if the school plans to offer regular transportation either for daily transportation to/from school OR for transportation to/from school specific activities and events that are a necessary part of the mission. All schools must be prepared to meet IEP transportation requirements.</p> <p>A complete response must</p> <ul style="list-style-type: none"> ● Identify a plan for establishing transportation services at the school including specific action steps, timelines responsible parties, and associated costs that address the following: <ul style="list-style-type: none"> ○ Identifying equipment purchase or contracting needs ○ Identifying hiring and or contracting needs ○ Hiring or contracting ○ Establishing training needs and inspection process needs ○ Establishing travel routes and pick up/drop off points ○ Establishing transportation policies and practices ○ Identifying student transportation needs; transportation plan costs; and ● Identify all, but at least one, specific entities or organizations that have been identified as potential partners or vendors for these services.
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The Equip Academy of New Mexico founding team’s response Approaches the expectations for this section.

The applicants indicate they will only provide transportation if they receive funding through a grant. However, should they receive funding through a grant they will establish a bus plan by August 15, 2026 and will address all expectations included in this section.

This section received an Approaches as a rating, because a bus plan was not included as a contingency should they receive a grant.

RESPONSE - Transportation and Bus Plan

Factual error or misunderstanding (pages 201-202)

As a public school, we are committed to providing bus services to students, which we see as an equity issue. The budget does provide for transportation costs in year 1, supported through revenue from the operational fund. We have outlined a bus plan within the charter application in section J.(1), which we have also placed below. This plan will be customized to the transportation needs of enrolled students following the lottery and survey of transportation needs of our families.

- Identifying equipment purchase or contracting needs
- Identifying hiring and or contracting needs
- Hiring or contract to ensure that all requirements under NM 22-8-27 are met by “establishing a systematic program for the purchase of necessary school bus transportation equipment”
- Establishing training needs and inspection process needs to ensure that the following 6.41.2.9 state statutes are met which include but not limited to: Record keeping for bus maintenance ensuring safety with proper audit program, ensuring semi-annual inspections with proof via a record, random inspections (potentially daily with proof of record keeping from contractor, driver inspections for appropriate licensure, etc.
- Establishing travel routes and pick up/drop off points, working directly with the vendor to establish the most efficient and accessible routes for students as per NM 22-16-4 code.
- Establishing transportation policies and practices

- Identifying student transportation needs; transportation plan costs

Should transportation accommodation be included as part of a student’s individualized education plan, Equip Academy is committed to accommodating transportation in all years of operation in order to meet the student’s IE as per NM 6.41.4.7 code.

Possible Vendors are Herrera School Buses and Coaches⁶ (North West Albuquerque) and Albert Sanchez Bus Company (South West Albuquerque). Post-charter approval, we will meet with vendor(s) and negotiate contractual terms for Equip Academy students.

Transportation Funding: As further detailed in our budget, Equip Academy will assume the costs of transportation in **Year 1**, including an assumption of \$45,000 per school bus and \$5,000 for transportation insurance (See FUND: 11000, FUNCTION: 2700) with the intent of applying and acquiring transportation funding in **Year 2**. To calculate the transportation funding for Year 2, the school looked at a recently approved charter school with similar student counts in Year 1 to estimate the amount they would receive in funding.

RESPONSE - Funding for Transportation

Clarification (BUDGET Details)

As a public school, we are committed to providing bus services to students, which we see as an equity issue. The budget does provide for transportation costs in year 1, supported through revenue from the operational fund. Scott Hindman, Executive Director of Excellent Schools New Mexico, verified by a letter dated June 19, 2024, that Excellent Schools New Mexico will make a one-time \$350,000 unrestricted grant to Equip Academy of New Mexico upon Equip Academy of New Mexico's successful charter application authorization by the New Mexico Public Education Commission. These funds will support other start-up and Y1 costs, thus enabling us to leverage operational funds to provide bus transportation for our community starting in Y1.

J.(2)	<u>Food Services Plan</u>
Rating	Expectations

⁶ “Herrera School Buses and Coaches” has no relation to the proposed Head of School, Mercy L. Herrera

Approaches	<p>A complete response must</p> <ul style="list-style-type: none"> ● Identify a plan for establishing food services at the school, including specific action steps, timelines responsible parties, and associated costs that address the following: <ul style="list-style-type: none"> ○ Identifying equipment purchase or contracting needs ○ Identifying hiring and/or contracting needs ○ Hiring or contracting ○ Establishing training and inspection process needs ○ Identifying and completing relevant program application and reporting requirements; ● Identify all federal and state food service programs the school plans to participate in; ● If providing or planning to offer a PreK or Early Childhood program, provide a plan for food service; ● Identify how the school will fund the food service plan costs prior to receiving any applicable reimbursements; and ● Identify all, but at least one, specific entities or organizations that have been identified as potential partners or vendors for these services and describe all steps that have been taken to create a relationship, establish a relationship, or develop a partnership to provide these services.
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The Equip Academy of New Mexico founding team’s response Approaches the expectations for this section.

The applicants stated that they would submit an application for a Student Nutrition grant in Fall of 2024, but this needs to be done in Fall 2025.

Applicants did not identify how they would fund the program prior to reimbursements.

The narrative states: “The Head of School and operational lead will partner to manage the food service programs with support from the cafeteria staff (contracted staff or Instructional Assistants) that manage the food service environment for students.” Training for instructional assistants to handle food is not addressed.

RESPONSE - Student Nutrition Grant Submission

Clarification (page 203)

The Student Nutrition grant will be submitted in the Fall 2025.

RESPONSE - Funding the Nutrition Program

Factual error or misunderstanding (BUDGET details)

Prior to the reimbursements, Equip Academy will utilize the Excellent School New Mexico grant to fund the food program to ensure students have access to breakfast, lunch and snack at no charge. The school will submit all reimbursements by the 10th of the following month and pay vendors within the time frame stated on their bills.

K. Facilities/School Environment

K.(1)	<u>Appendix E Attachment: Facilities Master Plan Ed/ Spec Checklist</u>
Rating	Expectations
Meets	<p>A complete response must</p> <ul style="list-style-type: none"> ● Demonstrate the applicant submitted a Facilities Master Plan to PSFA by the deadline; ● If offering or planning or offer a PreK or Early Childhood program, provide a description of the facilities and playground in the Facilities Master Plan; and ● Demonstrate the PSFA has approved the applicant’s Facilities Master Plan.

The Equip Academy of New Mexico founding team’s response Meets the expectations for this section.

K.(2)	<u>Evidence of Researched Facilities/Properties</u>
Rating	Expectations
Meets	<p>A complete response must</p> <ul style="list-style-type: none"> ● Demonstrate the applicant has done the following: <ul style="list-style-type: none"> ○ Conducted outreach and researched multiple facilities or properties in the targeted geographic location to understand if there are public facilities that are available, appropriate, and viable ○ Identified whether or not each potential property will meet the requirements of NMSA 1978 § 22-8B-4.2, including occupancy, adequacy, and ownership; ● Identify at least one potential facility or property that meets requirements. ● Identify a plan that would enable the applicant to prepare the facility/property to meet the facility needs of the proposed school in time for the proposed school’s opening date, include specific action steps, timelines, responsible parties, and capital outlay needs; ● Identify how the project to prepare the facility will be funded.

The Equip Academy of New Mexico founding team’s response Meets the expectations for this section.

III. Financial Framework

A. School Size

A.	<u>Projected Enrollment</u>
Rating	Expectations

Meets	<p>A complete response must</p> <ul style="list-style-type: none"> • Identify the anticipated number of students for each of the first five years and “at capacity”, based on the long-term strategic plan; • Identify the grade levels requested to be served in each of the first five years (phase in plan) and “at capacity”, based on the long term strategic plan; and • Identify the student/teacher ratio (not student/staff ratio) that aligns with the number of students served, grade levels, and staffing plan for each of the first five years and “at capacity”, based on the long term strategic plan.
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The Equip Academy of New Mexico founding team’s response Meets the expectations for this section.

B. Budgets

B.(1)	<u>Attached Appendix F, 910B5 State Equalization Guarantee (SEG)</u>
Rating	Expectations
Does Not Meet	<p>A complete response must</p> <ul style="list-style-type: none"> • Include a complete 910B5 Worksheet in Appendix F; • Use appropriate values and computations in each year; • Use projected unit value; and • Budget the correct special education percentage based on the local special education population, unless the school has a sufficient justification for why it will have a larger population (provide justification, if applicable).

The Equip Academy of New Mexico founding team’s response Does Not Meet the expectations for this section.

The following concerns have been noted:

- 910B5 is the wrong Appendix 910B5 and is not in alignment with proposed enrollment. It appears the 910B5 for the first year was copied into the second year. As such, the enrollment numbers are off for each year, which is significant considering the school intends to have enrollment increase by 75 students each year.
- Rural Population is applied to all students. This does not seem accurate given the school is in Albuquerque.
- The applicant factored in a 3% increase in the SEG unit value for each year. This was an increase % from FY24 to FY25, but it could be "optimistic".
APS At Risk Index for FY 24 = .200, Applicant used .189
- The school has included funding for the K-12 Program in the SEG, but there are no K-12 Program days in the calendar. This has a large financial impact for the school.
- The special education percentage is higher than the district for each year with several years having a special ed population of near 28%. No justification provided.

RESPONSE - 910B5 and Enrollment

Factual error or misunderstanding (BUDGET Details, Appendix F)

This appears to have been a mis-reading of the 910B5. Proposed enrollment figures in these appendices are based upon informed and experienced practice for enrollment reporting. The first year

910B5 will be adjusted by PED for actuals based on the 40th day. All subsequent years will be based on the average 80/120 day student count from the prior year. The reason why the numbers match for years 1 and 2 is because they are both student counts for the first year; year 1 is the 40th day and year 2 is the average of 80/120 day. We assumed the school would keep steady enrollment during the first year. The additional 75 students in year 2 are budgeted as growth which is further down on the 910B5.

RESPONSE - Rural Populations

Factual error or misunderstanding (BUDGET Details, Appendix F)

This appears to be a mis-reading of the 910B5. Equip Academy did not apply any students to rural populations given our proposed area is in the Albuquerque area. We do not anticipate receiving any Rural Population funding as schools in Albuquerque do not receive this. Our 910B5 shows zero funding being allocated from this. See reference from our 910B5 and it is zero across all 5 years.

<u>Rural Population:</u>		Rural Population	Rural Population	Chartered		Cost	
Rural Population Formula	800/1200 AVG FTE MEM	Rate	Rate >0.4	After 7/1/2018?	Eligible?	Differential	Units
$(MEM) \times (Rural\ Population) \times (0.15) = Units$	75.00	0.000	N	Y	N	0.15	0.000

RESPONSE - Increase in SEG Unit Value

Factual error or misunderstanding (BUDGET Details, Appendix F)

We looked at the trend of the increase in unit value over the last 10 years and believed 3% to be a conservative increase in unit value. The APS At Risk Index rate used for the FY25 910B5s is .189.

Timeline	Unit Value	Percentage Change
2014	\$3,817.55	
2015	\$4,007.75	5%
2016	\$4,037.75	1%
2017	\$3,979.63	-1%
2018	\$4,084.26	3%
2019	\$4,190.85	3%
2020	\$4,602.27	10%
2021	\$4,536.75	-1%
2022	\$4,863.00	7%
2023	\$5,522.50	14%
2024	\$6,241.67	13%
2025	\$6,442.55	3%

RESPONSE - SEG Funding

Factual error or misunderstanding (BUDGET Details, Appendix F)

This appears to be a mis-reading of our budget materials. We believe Equip Academy's K-12+ revenue estimates to be correct based upon local guidelines. Specifically, as per the most recent 2024 and 2025 K-12+ Program Guidelines Manual funding protocol, the school can use up to 60 hours of professional development towards the K12+ days. Equip Academy has 198.5 hours of professional development built into its budget. At 6 hours per day, we are able to count an additional 10 days ($6 \times 10 = 60$ hours), for a total of 196 days counting towards the K12+ program. The Tier 1 multiplier is based on total days over 180 and the Tier 2 multiplier is based on total days over 190. The days do not need to be specified as K12+, they are looking at hours and days in total. The school has 186 instructional days plus over an additional 10 days (6 hours per day) of professional development. See image below for reference:

K12+ Program Guidelines Manual

Introduction

In the 2023 Legislative Session, the New Mexico Legislature passed and Governor Michelle Lujan Grisham signed into law House Bill 130. This bill:

- increases the minimum instructional hours requirement to 1,140 hours for all grade levels;
- allows for up to 60 hours of professional work hours for elementary educators and up to 30 professional work hours for secondary educators to count toward the 1,140 instructional hours requirement; and
- repealed the K5+, Extended Learning Time Program (ELTP) and the K12+ grant programs and replaced them with the new K12+ Program. K12+ will now be funded through the State Equalization Guarantee (SEG), eliminating the need for an application and approval process.

What follows is a guide for implementation of the new instructional hours requirements and the K12+ Program.

RESPONSE - SPED Percentage and Rationale

Factual error or misunderstanding (BUDGET Details, Appendix F)

This appears to be a misunderstanding. The school requested the FY25 planning 910B5 special education counts for APS from PED. We took the percentage of A/B, C, and D students from this and allocated it to our numbers.

Early Childhood Education (ECE) Program:		80D/120D AVG MEM					
PK		1,015.50					
KF		4,533.50					
Total ECE FTE (PK/2+KF)		5,041.25			Factor	1.440	Units 7,259,400
Basic Program (Includes A/B, C & C-Gifted, D & D-Gifted):							
Grade 1		4,745.00			1.200		5,694,000
Grade 2		5,061.50			1.180		5,972,570
Grade 3		4,984.00			1.180		5,881,120
Grade 4		5,182.00			1.045		5,415,190
Grade 5		5,289.00			1.045		5,527,005
Grade 6		4,593.50			1.045		4,800,208
Grade 7		4,577.00			1.250		5,721,250
Grade 8		4,774.00			1.250		5,967,500
Grade 9		6,703.00			1.250		8,378,750
Grade 10		5,937.50			1.250		7,421,875
Grade 11		4,959.00			1.250		6,198,750
Grade 12		4,378.00			1.250		5,472,500
Total Grades 1-12		61,183.50					72,450,718
Total FTE MEM		66,224.75				Total Membership Program Units	79,710,118
Staffing Cost Multiplier (SCM):			OCT 2023 TCI	WEIGHT		SCM	
			1.074	1.00		1.074	
			subject to change based on TCI audit				
						Adjusted Membership Program Units	85,608,667
Special Education Program:		80D/120D AVG MEM			Factor	Units	
A/B MEM		11,964.00			0.70		8,374,800
C & C-Gifted		3,112.00			1.00		3,112,000
D & D-Gifted		3,486.50			2.00		6,973,000
D LEVEL 3Y-4Y		765.50			2.00		1,531,000
Adjusted Ancillary FTE		544.25			25.00		13,606,250
							33,597,050

B.(2)	Attached Appendix G: Proposed five-year Budget Plan
Rating	Expectations
Does Not Meet	<p>A complete response must</p> <ul style="list-style-type: none"> • Include a five-year budget plan in Appendix G that is based on the 910B5 SEG Revenue Worksheet from Appendix F; • Support the proposed school’s mission and all elements of the proposed program laid out in the application; and • Align with the proposed school’s five-year growth plan.

The Equip Academy of New Mexico founding team’s response Does Not Meet the expectations for this section.

The following concerns have been noted:

- In all but year 1, the expenditures exceed revenue. Total 5-year deficit = \$3,094,628. The applicant budgeted carry-over cash for all years, but there is deficit spending in all years, so there is no carry-over cash.
- All grants that were budgeted were in balance except 26999. In year 1 the revenue was greater than expenditures and the carryover was not budgeted for year 2.
- Should not have budgeted for Fund 26999 as this grant needs to be applied for and there is no guarantee the applicant will receive the funds. Additionally, the applicant included the planning year revenue and expenditures for this grant, and this is not correct.
- Applicants did not budget SPED teachers until year 3.
- Did not budget anything in 2200 for testing or technology (library as well).

- Used incorrect object code for Professional Services, used 55900, should be 53414 and for function 2600 contracted janitorial should be 54312
- The salary for the assistant principal in year 4, even as a .5FTE, does not meet PED minimum requirement (off by \$250).
- If the office assistant is the position budgeted in 2400-1211, this position salary is more than the office manager position, 2400-1217, which supervises the office assistant.
- There was no budget for the Manager of Operations, who starts in year 5.
- Not all of the positions in the narrative were budgeted (1.0 Sped and 1.0 Enrich Teachers in year 1 & 2 and 1.0 Enrichment teacher in year 3 and 2.0 Enrichment teacher in years 4 & 5)
- Even though the budget indicates SPED & Enrichment teachers are paid in contract services there is not enough to cover 1.0 for each in years 1 & 2.
- The principal and manager of operations salaries were lower on the budget than on the salary schedules
- The revenue amount for year 1 should be based on projected SEG without federal flowthrough funds. Unrestricted cash amounts are not accurate, and the school cannot depend on capital outlay to support purchasing a building.

COMPREHENSIVE RESPONSE

Factual error or misunderstanding (BUDGET Details, Appendix F, Appendix G)

There appear to be multiple misunderstandings and mis-readings of the budget as submitted, which are individually addressed below. There are two small items that we have updated as well (please see below).

RESPONSE - Expenditures and Revenues

Factual error or misunderstanding (BUDGET Details, Appendix G)

This appears to be a misunderstanding of the budget as submitted. We presented a balanced budget as we would if we were submitting to PED. In the application, we stated that our cash carryover/money we would not be spending was budgeted in function 1000 object 57331. The deficit number you have is the same as our cash carryover number year to year.

RESPONSE - FUND 26999

Clarification(page 211, BUDGET Details, Appendix G)

We appreciate the opportunity to address this item directly. Scott Hindman, Executive Director of Excellent Schools New Mexico, verified by a letter dated June 19, 2024, that Excellent Schools New Mexico will make a one-time, \$350,000 unrestricted grant to Equip Academy of New Mexico upon Equip Academy of New Mexico's successful charter application authorization by the New Mexico Public Education Commission.

RESPONSE - Budget Details for Testing or Technology

Factual error or misunderstanding (BUDGET Details, Appendix G)

This appears to be a misunderstanding of the budget as submitted. Internal assessments and all books were budgeted in the curriculum. The PED has not charged for testing in recent years.

RESPONSE - Professional Services Object Code

Factual error or misunderstanding (BUDGET Details, Appendix G)

This appears to be a misunderstanding of the budget as submitted. Object 55900 was not used in the budget. Per the May 2024 PED UCOA Supplement 55915 is for janitorial. See image below for reference:

55915 Other Contract Services. Includes services such as janitorial, security, legal notices, linen and industrial, printing and binding, medical claims review/payment, grounds keeping, referees, and drug and alcohol testing. Used with all Functions except 2900 (Other Support Services), 4000 (Capital Outlay), and 5000 (Debt Service and Miscellaneous). **Use 53330 for any expenditures that apply to professional development.**

RESPONSE - Assistant Principal Salary

Clarification (Budget Details, Appendix G)

Thank you for the opportunity to clarify. This role is an APIR = Assistant Principal in Residence. This role is an AP in training and therefore will be working towards administrator licensure during the residency year. However, the budget has been updated to reflect the minimum.

RESPONSE - Office Assistant and Office Manager Salaries

Factual error or misunderstanding (Budget Details, Appendix G)

This appears to be a misunderstanding of the budget as submitted. The Office Manager, as seen in line 2400-1211, is budgeted at \$45,000; the Office Assistant, as seen in line 2400-1217, is budgeted at (Y1 @ .45 FTE) \$15,750.00 and (Y2 @ 1 FTE) \$35,525.00.

RESPONSE - Budget Details for Manager of Operations

Factual error or misunderstanding (BUDGET Details, Appendix G)

This appears to be a misunderstanding of the budget as submitted. This is budgeted in function 2300 object 51100 job class 1113.

RESPONSE - Budgeting for All Positions

Factual error or misunderstanding (BUDGET Details, Appendix G)

This appears to be a misunderstanding of the budget as submitted. All of the positions in the narrative have been budgeted per all hiring needs.

RESPONSE - Sufficient Revenue for SPED and Enrichment

Factual error or misunderstanding (BUDGET Details, Appendix G)

This appears to be a misunderstanding of the budget as submitted. All of the positions in the narrative have been budgeted and updated as per all hiring needs.

RESPONSE - Revenue

Factual error or misunderstanding (BUDGET Details, Appendix G)

This appears to be a misunderstanding. Federal funds will be allocated based on 40th day student counts. Per the PED award letters for other first year charters, they were allocated Title I and IDEA-B funds. We are not counting on special capital outlay funding to purchase a building. We only have lease assistance budgeted as a capital outlay fund.

B.(3)	<u>Budget Narrative</u>
Rating	Expectations
Does Not Meet	A complete response must <ul style="list-style-type: none">● Explain basic assumptions;● Identify reliable sources for each assumption;● Include priorities consistent with the proposed school’s mission;● Include priorities consistent with the proposed school’s educational program;● Include priorities consistent with the proposed school’s staffing; and● Include priorities consistent with the proposed school’s facility.

The Equip Academy of New Mexico founding team’s response Does Not Meet the expectations for this section.

The following concerns have been noted:

- In the budget narrative, Figure 96, the expenditures are not the same as in the budget document. The applicant references a grant from Excellent Schools New Mexico and has budgeted for this grant in the amount of \$350,000. They are counting on this grant to fund their planning year and in year one. Scott Hindman, Executive Director of Excellent Schools New Mexico verified by a letter dated June 19, 2024, that Excellent Schools New Mexico will make a one-time, \$350,000 unrestricted grant to Equip Academy of New Mexico upon Equip Academy of New Mexico's successful charter application authorization by the New Mexico Public Education Commission. However, because they will use the funds, mostly in their planning year, this should not be included in their budget spreadsheet, especially for the planning year.
- Not all positions are budgeted for and not all salaries budgeted align with the salary schedule. The budget projections are unrealistic. The amount of federal flowthrough funding from APS is negotiated per year and cannot be assumed to increase in the amounts listed. Cash reserves of 48% in Year 4-5 to help to purchase a permanent facility are unrealistic as the school’s cash reserves from the SEG go to instruction and not capital campaigns.
- The budget projections are unrealistic. The amount of federal flowthrough funding from APS is negotiated per year and cannot be assumed to increase in the amounts listed. Cash reserves of 48% in Year 4-5 to help to purchase a permanent facility are unrealistic as the school’s cash reserves from the SEG go to instruction and not capital campaigns.

COMPREHENSIVE RESPONSE

Factual errors or misunderstandings (BUDGET NARRATIVE, BUDGET Details, Appendix G)

There appear to be some misunderstandings and mis-readings of the budget as submitted, which are individually addressed below. There is one small item that we have updated as well (please see below).

RESPONSE - Grant

Factual error or misunderstanding (page 211, BUDGET Details, Appendix G)

This appears to be a misunderstanding. The Excellent Schools New Mexico grant is unrestricted and can be used across the planning year and year one; therefore, we are utilizing it across both years. Scott Hindman, Executive Director of Excellent Schools New Mexico, verified by a letter dated June 19, 2024, that Excellent Schools New Mexico will make a one-time \$350,000 unrestricted grant to Equip Academy of New Mexico upon Equip Academy of New Mexico's successful charter application authorization by the New Mexico Public Education Commission. As indicated by the instructions, we included these funds in the "26000 Fund Codes." The template also includes a budget line item for planning in fund 26999. Please see PED guidance used for our budgeting lines.

If the school intends on receiving other charitable funds, please include those in the 26000 fund codes by adding additional 2600 codes in the revenue string. To identify already established 26000 fund codes, please review the fourth tab in this sheet "26000 Fund Codes." If a current fund code does not exist, please use 26999 as a placeholder code and add an appropriate description to identify the funding source.

RESPONSE - Salaries and Budget Projections

Clarification (BUDGET Details, Appendix G)

Thank you for this opportunity to clarify. All accurate salary projections are on the budget sheet. Salary schedule questions were answered in B(2) and B(3) above across multiple questions. We will adjust salary bands to ensure full clarity and accuracy. Equip Academy will allocate all funding for instruction as necessary. As has been established as prudent and conservative fiscal planning, and as exercised by many charter schools, we will also remain conservative in order to reserve funds for long-term sustainability given that we are not privy to bonds and other financing sources as is possible with district schools.

RESPONSE - Budget Projections

Factual error or misunderstanding (BUDGET Details, pages 210-214)

This appears to be a misunderstanding. We are not an APS charter so our funding will not be negotiated. As a potential state charter authorized by the PEC, our research has been based on currently publicly available information as well as the experience of other charter schools and their federal awards with similar enrollment.

B. (4)	<u>Budget Adjustments</u>
Rating	Expectations
Approaches	<p>A complete response must</p> <ul style="list-style-type: none"> ● Describe budget control strategies as well as budget adjustments that will be made to meet financial budget and cash-flow challenges; ● Describe budget control strategies as well as budget adjustments that will be made to address the failure to receive any anticipated funding sources; ● Include explanations that are viable and realistic, based on the professional judgment of experienced, licensed, school business officials; ● Address how special education students will receive services before special education funding is provided, based on accurate 40-day counts; and ● Address how gaps between budgeted students and actual enrollment will be addressed. ● Demonstrate how budget control strategies provide capacity to manage the budget successfully. ● Address how the school will modify the budget for students with special needs. ● describe how the proposed school will address the budget in the event that the proposed school has budgeted for more students, based on early enrollment, than actually enroll in the proposed school at the beginning of the proposed school year.

The Equip Academy of New Mexico founding team’s response Approaches the expectations for this section.

The following concerns have been noted:

- The applicant states: "Our budget includes only the revenues we qualify for based on our academic and supportive programming for our projected student enrollment. We have not budgeted any grants or funds that should not be allocated to Equip Academy." The applicant budgeted for Title I (24101) and IDEA (24106) for all years. In year 1 these may not materialize, especially IDEA as they will not have a full accounting of their SPED population.
- Additionally, all SPED expenditures need to come from their SEG Operational fund; IDEA is for costs above and beyond.
- The applicant states: "Additionally, the school has an Administrative Assistant budgeted at a part-time FTE for year 1. The school will delay hiring this position until we have submitted 40th day student counts and know we can afford the position". Who will perform these duties if they cannot afford to hire for this position?
- Does not adequately address how gaps between budgeted students and actual enrollment will be addressed. Similarly, does not address what happens if actual enrollment is less than early enrollment predictions.
- Cash balances projection is unrealistic for the budget to be used towards purchasing a building. Cash balances are used to maintain program, curriculum, training, equipment, furniture for the school, and not capital outlay to the extent stated in the budget application.
- There is a concern about the issue of supplanting with the use of federal funds instead of SEG to support staff. It’s not clear that the founding members/Governing Board understand the difference and the requirements.

COMPREHENSIVE RESPONSE

Factual errors or misunderstandings (BUDGET Details)

There appear to be several misunderstandings and mis-readings of the budget as submitted, which are individually addressed below.

RESPONSE - Y1 Funding

Factual error or misunderstanding (BUDGET Details)

This appears to be a misunderstanding of the budget details as submitted. We realistically and conservatively anticipate that federal funds will be allocated based on 40th day student counts. Per the PED award letters for other first year charters, they were allocated Title I and IDEA-B funds. Our 40th day percentage will be calculated and funds will be received and distributed based on actual count as these are projections based on current percentages.

RESPONSE - SPED Expenditures

Factual error or misunderstanding (BUDGET Details)

This appears to be a misunderstanding of the budget details as submitted. The SEG operational fund will support the costs of our educational program overall. All SPED expenditures as may be drawn from IDEA will be used to supplement and not supplant educational services beyond our core educational program and only for those students on IEPs receiving such services. Further, our research indicates that, Per the PED award letters for other first year charters, they were allocated IDEA-B funds and were allocated based on 40th day student counts starting in year 1.

RESPONSE -Administrative Assistant

Factual error or misunderstanding (BUDGET Details)

This appears to be a misunderstanding of the budget details as submitted. Our conservative and balanced budget demonstrates that we have the financial capacity to hire, at minimum, a .45 FTE Office Assistant who will take on the core financial tasks outlined above. The .45 FTE position is budgeted in function 2400 object 51100 job class 1217. We have adjusted the hiring of this position within the budget adjustment area to a .25 FTE role if needed, given the critical need for segregation of financial duties on the day-to-day school level.

RESPONSE - Enrollment Projections and Budget

Factual error or misunderstanding (BUDGET Details)

We recognize that the fiscal health of the school is dependent on enrollment. We are clear as a group that we will monitor that metric closely in the planning year. Our goal is not to be in this position, and to reach full enrollment and establish a wait list. To be prudent, we have also planned for the worst-case scenario. As we will not hire for teaching positions until actual enrollment warrants, we plan on adjusting our budget until we have enough students to justify more teachers. We also have an administrative position the first year that we could, if needed, delay hiring until the 40th day when we have the enrollment funding. There are contractor

positions that will also be based on demand and will be adjusted based on actual enrollment numbers. We also have a model that K12 accounting has developed to help us determine how much our anticipated funding is based on current student count and which expenses to cut based on enrollment figures if they are below what we expect, ensuring that we are prioritizing the instructional needs of all students and all learners, including those with IEPs.

RESPONSE - Cash Balances

Factual error or misunderstanding (BUDGET Details)

This appears to be a misunderstanding of the budget details as submitted. Equip Academy will allocate all funding for instruction as necessary. As many charters do, we will also remain conservative in order to reserve funds for sustainability for a facility given we are not privy to bonds and other financing sources that districts are. Federal funds will be allocated based on 40th day student counts. Per the PED award letters for other first year charters, they were allocated Title I and IDEA-B funds. We are not counting on special capital outlay funding to purchase a building. We are using our cash carryover. There could be a decrease in projections in the future due to unforeseen circumstances or additional educational needs, and we will remain conservative.

RESPONSE - Federal Funds

Factual error or misunderstanding (BUDGET Details)

This appears to be a misunderstanding of the budget details as submitted. Positions budgeted out of federal funds are additional funds not needed to maintain mandated classroom sizes or Equip Academy’s instructional design but instead to provide additional support to students based on demographics if needed.

C. Financial Policies, Oversight, Compliance, and Sustainability

C.(1)	<u>Internal Control Procedures</u>
Rating	Expectations

Approaches	<p>A complete response must</p> <ul style="list-style-type: none"> ● Identify all the internal control procedures that have been attached in Appendix H; ● Attach in Appendix H internal control procedures the proposed school will utilize to assure the following: <ul style="list-style-type: none"> ○ safeguard assets ○ segregate its payroll ○ segregate cash and check disbursement duties ○ provide reliable financial information and promote operational efficiency ○ ensure compliance with all applicable federal and state statutes, regulations, and rules; ● Attach procedures that—based on the professional judgment of experienced, licensed, school business officials—successfully ensure appropriate segregation of duties; and ● Provide a process the school will use to regularly evaluate compliance with the internal control procedures that have been attached in Appendix H and other internal control procedures that will be developed and implemented by the school.
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The Equip Academy of New Mexico founding team’s response Approaches the expectations for this section.

The following concerns have been noted:

- In the internal controls document, the applicant refers to the Office Manager of Education at the PED. There is no such position.
- “Equip Academy of New Mexico will maintain an emergency account that may range from one (1) percent to five (5) percent, not to exceed five (5) percent, of its operational expenditures using operational cash balances carried forward from the previous fiscal year. Equip Academy of New Mexico will use the account to pay for any unforeseen expenditures that may arise after the initial budget has been approved.” Money in the emergency account shall not be expended on salaries or benefits without prior written approval from the Head of School.
- If the school budgets emergency reserve, they must get permission from the Secretary of Education to spend these funds.
- The internal controls document states that land has a depreciation schedule of 39 years. Land does not get depreciated, only the structures built on the land.
- Regarding purchasing contracts, it should be included in the policies and procedures that only the Head of School (or the GC Board Member) can sign contracts. Employees are not allowed to commit the school to a contract. All multi-year contracts (contracts crossing fiscal years) need to include the non-appropriation of funds cancellation clause.
- Detailed Internal Controls are given within the response area of the application, but these details are not included in the Internal Controls document.

RESPONSE - Role Reference

Clarification (Appendix H)

Thank you for the opportunity to clarify. The Office Manager is an employee at Equip Academy and will liaise with a NMPED representative.

RESPONSE - Internal Controls Document

Clarification (Appendix H)

The submitted Internal Controls are a sample. Post approval, the Board will finalize and approve all internal controls. All detailed Internal Controls will be included in the final Equip Academy documents post approval.

C.(2)	<u>Staff for Financial Tasks</u>
Rating	Expectations
Approaches	<p>A complete response must</p> <ul style="list-style-type: none"> ● Identify the appropriate staff to perform each financial task identified in the response to B(1) and all other required financial tasks; ● Align completely with the organizational chart from response to D(1) in the Organizational Framework; ● Align completely with the budget in A(1) and A(2) responses in Financial Framework; ● Describe appropriate qualifications and responsibilities for each of the identified positions; and ● Include a plan that will result in the recruitment, identification, the evaluation of candidates, and the hiring of highly qualified staff for each of the identified positions, no later than two weeks prior to the start of the proposed school year.

The Equip Academy of New Mexico founding team’s response Approaches the expectations for this section.

The following concerns have been noted:

- It appears that multiple employees are tasked with the same financial tasks as noted in the charter document and the job descriptions.
- The office manager is assigned some financial tasks. However, in the budget adjustment area, it is stated that this position may not be filled in year one if there is not enough revenue provided to the school to pay for this position.
- The office assistant and the operations manager are not hired until later years, and they appear to have some of the same responsibilities.
- The operations manager is not budgeted.
- The business manager (contracted firm) is in the Organizational Chart and will be hired using the CES or ACES contract.
- The narrative is missing a plan that will result in recruitment, identification and hiring of staff no later than 2 weeks before the start of school. However, this was addressed in the section on staffing.
- There appears to be a significant overlap between many of the administrative staff for the school which is confusing regarding who is responsible for what tasks. The Governing Board has the Head of School being responsible for the budget and monthly reporting, etc. But many of the same monthly tasks are also the responsibility of the contracted Business Manager, the contracted Assistant Business manager and the contracted Chief Operating Officer.
- Although the Internal Controls Manual follows the State and Federal laws relative to financial issues, who does each task seems confusing and the process that the school will follow is also not clear. For example, the submission of BARs to PED are considered approved if the PED takes longer than 30 days to approve a BAR.

COMPREHENSIVE RESPONSE

Factual error or misunderstanding

There appear to be some misunderstandings of the details provided within this section, which are individually addressed below. We also provide additional detail for full clarity in response to reviewers' noted concerns (please see below).

RESPONSE - Financial Tasks

Clarification (pages 219-225)

We appreciate the opportunity to further clarify. As a slow growth charter school, growing one grade per year with associated staffing sizes, we recognize the need to have a cross-trained team to ensure adequacy of implementation of core day-to-day operational needs of a small school. We also recognize the need to have clear responsibilities within each role, particularly as the school grows over time and roles become increasingly segregated per duties. The "common" tasking on the job descriptions primarily captures that cross-training approach to staffing these key positions and ensuring no gaps at any time. We will update the job descriptions prior to posting any positions, separating out those cross-trained functions from those prioritized within the role. Specifically, in Year 1, the Office Assistant will prepare and maintain bank deposits, manage all shipping and receiving, including invoice management, and collect monies for various student activities. In Year 3, these responsibilities will shift to the Office Manager as hired, which we anticipate may be the promotion of the individual within the Office Assistant role. The Office Assistant will then become a technical support of the many small administrative tasks within the school office.

RESPONSE - Office Manager

Factual error or misunderstanding (BUDGET Details)

This appears to be a misunderstanding, and we provide further clarity here as well. Our conservative and balanced budget demonstrates that we have the financial capacity to hire, at minimum, a .45 FTE Office Assistant who will take on the core financial tasks outlined above. The .45 FTE position is budgeted in function 2400 object 51100 job class 1217. We have adjusted the hiring of this position within the budget adjustment area to a .25 FTE role if needed, given the critical need for segregation of financial duties on the day-to-day school level.

RESPONSE - Office Roles

Factual error or misunderstanding (BUDGET Details)

This appears to be a misunderstanding, and we provide further clarity here as well. The Office Assistant is hired in Y1 as a .45 FTE position, which becomes a 1 FTE position in Y2 and in all continuing years. The Office Manager is hired in Y3. The Manager of Operations is hired in Y5. As stated above, we cross train positions, particularly in the early years, to ensure adequacy of implementation and maintenance of segregation of financial duties within a small staff. As roles are added, more prioritization of key functions is made clear across the growing team. As stated above, the "common" tasking on the job descriptions primarily captures that cross-training approach to

staffing these key positions and ensuring no gaps at any time. We will update the job descriptions prior to posting any positions, separating out those cross-trained functions from those prioritized within the role.

RESPONSE - Office Manager

Factual error or misunderstanding (BUDGET Details)

This appears to be a misunderstanding of the budget details as submitted. The office manager is budgeted in function 2400 job class 1211 and the operations manager is budgeted in function 2300 job class 1113.

RESPONSE - Business Manager and Assistant Business Manager

Factual error or misunderstanding (BUDGET Details)

This appears to be a misunderstanding, and we provide further clarity here as well. The Business Manager and Assistant Business Manager will be contracted as service through a business through an ACES or CES contract.

RESPONSE - Hiring Deadlines

Clarification (pages 172-175)

Equip Academy's plan for recruitment, identification and hiring staff no later than two weeks before the start of school is outlined in Section II D.(3).

RESPONSE - Administrative Roles

Factual error or misunderstanding

This appears to be a misunderstanding, and we provide further clarity here as well. We intend to hire K12 Accounting as our financial back office provider which supports school districts as well as charter schools by fulfilling responsibilities normally taken on by a Business Manager and Assistant Business Manager. As a school that will start with 75 students in Y1, and grow by 75 students per year with accompanying staff growth, it was critical for us to have in place an experienced, respected, and proven financial set of services starting on day 1. The Head of School will be responsible for setting all annual budget priorities, working with K-12 to ensure a conservative and balanced budget with full and detailed assumptions, which will be ready for the Board's consideration and approval; the Head of School will be responsible for making ongoing financial decisions to ensure short-term fiscal health and healthy cash flow, with the technical support of K12 and the oversight of the Board; the Head of School will be responsible for meeting weekly with K12 to ensure that all financial items are being recorded and deposited accurately, and the Head of School will be the signatory for the school; any second signatory will be a member of the Board, and most typically the Treasurer. K12 will prepare the monthly financial statements for the board and will attend monthly board meetings to discuss any financial questions. Equip Academy does not have a Chief Operating Officer on staff.

RESPONSE - Internal Controls

Clarification (Appendix H)

Current Internal Controls are a sample and will be finalized upon approval. Per the example cited in the concern, the business manager (this will be served through our K12 contracted services) will prepare BARs to be reviewed and approved to the Governing Board. After approval by the Governing Board, the HOS will approve any BARs in OBMS; K12 Financial Services, in the contracted role of business manager, will make the final submission of OBMs to PED.

C.(3)	<u>Governing Body Legal & Fiscal Oversight</u>
Rating	Expectations
Approaches	<p>A complete response must</p> <ul style="list-style-type: none"> ● Describe how the Governing Body audit and finance committees will be formed and how they will: <ul style="list-style-type: none"> ○ Function generally ○ Ensure proper legal oversight ○ Ensure proper financial oversight; ● Describe how the proposed school’s audit and finance committees will interact with the school’s management; and ● Describe how the audit and finance committees will interact with the full Governing Body.

The Equip Academy of New Mexico founding team’s response Approaches the expectations for this section.

The following concerns have been noted:

- The applicant states in this section that the audit committee is responsible for selecting the school’s annual auditor. As a state-chartered charter school, the school is required to be audited as a part of the PED audit. It is also stated that this committee will also conduct an internal audit of the Governing Board to assess its performance, but this is not a requirement and should possibly be an ad hoc committee or a part of the governance committee (if there is one). Additional clarity is needed in regard to legal oversight or how the committees will interact with management or the full governing body.
- Per NMAC 22-8-12.3 the Audit committee must contain two Governing Council members, a parent and a volunteer who has experience in finance or accounting. This requirement should be included in the plan and Bylaws.
- There is a concern that the Governing Board will be involved with the running of the school and its finances. The Head of School and the Business Manager/Assistant Business Manager run the school and finances and keep the Governing Board informed of the operation of the school.
- Although every member of the Governing Board is involved on a committee, there is concern that communication between Board members could violate the Open Meetings Act (e.g. Finance Committee and Audit Committee communication).
- Although Governing Board members have appropriate background and training in various aspects of running a program or a business, the understanding of financial requirements for running a school are very different from the business world and the State and Federal laws required for public schools.

RESPONSE – Annual Audit and Governance Management Relationships

Clarification (pages 224-226)

We affirm that as a state-chartered charter school, we will be audited as part of the PED audit and that the audit committee will not select the school’s auditor.

We will update who will conduct the internal audit of the Governing Board; this will be done by the Governance Committee.

The Governing Board has legal responsibility for oversight of the school, and will hire, set compensation for, oversee, and evaluate the Head of School, to whom it will delegate all management responsibilities and decisions for the school. The Head of School will report to the Board monthly, through a formal reporting process, and more often as requested by the Board. The Head of School will work with the Finance Committee to ensure that the annual budget is sufficiently prepared for the Board’s review, consideration, and vote, and that all monthly financial documents are prepared and ready for the Board’s review at each monthly Board Meeting. The Head of School will ensure that the Audit Committee has all necessary school resources and documents, and will furnish all items to the Committee upon request and make themselves fully available to both the Board and its committees as needed.

RESPONSE – Governance and Management

Clarification (pages 224-226)

The Governing Board is the body legally charged with fiscal and academic oversight of the school and is a policy-making body. The Board will hire and evaluate only one role – the Head of School; the Head of School is the only role to report to the Board. The Board will delegate all management responsibilities and decisions to the Head of School, and will not be involved in running the school in any way or in managing the finances of the school. Instead, the Board in its governance capacity will approve the annual budget, approve all fiscal policies, and review all monthly financials to ensure the short- and long-term financial health of the school and ensure that the school is abiding by all fiscal policies as set by the Board.

RESPONSE – OPEN MEETINGS ACT

Clarification (pages 224-226, 266)

All Board communication, including that of its committees, will fully comply with all elements of the Open Meetings Act. As stated on page 266, “**The Audit Committee** is responsible for preparing the school for its financial audit each year, starting with presenting multiple external auditors or auditing service for the Governing Board to consider and ultimately select. Once an auditor is selected, this committee will then be responsible for communicating with the auditor to support their work, tracking findings, and sharing the audit report with the broader Governing Board. This committee will also conduct an internal audit of the Governing Board to assess its performance. The Audit Committee will fulfill the duties pertaining to audit committees, per NMSA 22-8-12.3. This committee will consist of two members, neither of whom are a part of the Finance Committee.” Moreover, the Board and its committees, (page 225) “Upon authorization from the Public Education Commission, the Founding Board will transition to the Equip Academy of New Mexico Governing Board and maintain compliance with the New Mexico Open Meetings Act (NMSA 10-15-1). At this time, the Equip Academy of New

Mexico Governing Board will also elect officers and adopt the Bylaws, Conflict of Interest policy and Board Job Description found in **Appendix A**. In addition to fiscal oversight, the Board also oversees Mission and Vision Alignment; Academic Accountability; and Evaluation of Head of School. Public Transparency (please see **Section II, A-C** for more detail).

RESPONSE – FINANCIAL REQUIREMENTS OF RUNNING A PUBLIC SCHOOL

Factual error or misunderstanding (pages 225-226)

The Board has been working with and intends post-authorization to contract with the proven financial company, K12 Accounting, which provides financial services to districts across New Mexico, along with providing services to charter schools. In their work with districts and charters, K12 functions as a Business Manager and Assistant Business Manager and works with districts and schools to follow all laws as required by public schools in their financial policy-setting, planning, decisions, and management. We believe that such experience and expertise in and understanding of the financial requirements for running a school and the State and Federal laws required for public schools is a crucial element of the school and will be of deep advantage to the Governing Board. We recognize the differences in business and financial management in the private sector with that in the public sphere, and particularly in public education, and we will work closely with K12 and with PED to ensure that we are fully compliant with all requirements at the local, state, and federal level.

IV. Evidence of Support

A. Outreach Activities

A.	<u>Outreach Program</u>
Rating	Expectations
Approaches	<p>A complete response must</p> <ul style="list-style-type: none"> ● Describe an outreach program to develop community support for the proposed school that has been implemented during the application process; ● Describe specific activities that have been implemented, include evidence of implementation; ● Include evidence that demonstrates the activities reached a broad audience that is representative of the community in which the proposed school will be located; and ● Describe how this outreach has enabled the applicant team to understand the needs of the community in which the proposed school intends to locate.

The Equip Academy of New Mexico founding team's response Approaches the expectations for this section.

The following concerns have been noted:

- The proposed community is east of the Rio Grande. The response includes a map depicting representation of local community organizations, businesses, and individuals. Most of the pins on this map are on the west side of the river.
- The narrative states: "Out of the survey respondents (n = 36), 31% were from the Albuquerque Westside. By incorporating responses from neighboring areas such as Rio Rancho and the North Valley, which share proximity and demographic similarities, this collective accounted for 61% of the total sample. This is a substantial and adequate representation of the communities surrounding the proposed school." This does not show strong support from the Westside community. Even if the 61% is accepted as part of the community surrounding the proposed school, that's only 21 responses from the intended community.
- The response reflects the timeline and names of businesses and companies in Albuquerque that attended outreach meetings, but there is little family verification to demonstrate that the families that are interested in the school were reached during the outreach activities. 245 members of the community responded, 19 possible families were included in the responses.
- The narrative stated that outreach has enabled the team to understand the needs of the community; however, the response does not include what those needs are that have been identified.

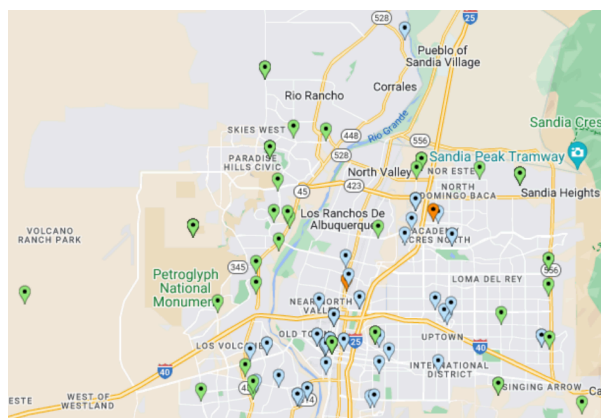
COMPREHENSIVE RESPONSE

Factual error or misunderstanding (pages 227-239)

Several concerns appear to be misunderstandings; we appreciate the opportunity to address and clarify each item.

RESPONSE - Community Support & Engagement Initiatives Map

Clarification (pages 2227-238)



To clarify, Equip Academy aims to locate West of the river (not East). In response to the number of community support and engagement pins located East of the river, it's important to note that the

preponderance of Albuquerque businesses, non-profit organizations, and social services is far denser East of the river based on historic population trends. The rapid development and population growth West of the river is why a new school option is particularly needed on Albuquerque's Westside. We have developed and will continue to cultivate and expand relationships with community organizations and families on the Westside and ensure we focus our student recruitment efforts in the highest-need areas of the community.

RESPONSE – Survey Respondents

Factual error or misunderstanding ((pages 237-238)

As required by NM charter law, the proposed school will be accessible to all families whose students are attending or would otherwise attend an Albuquerque public school. As such, we have ensured that multiple communities were made aware of the proposed school. Our wider outreach efforts amplify the strong interest in and support of the school from the Westside, as seen below and as noted in our application. The data collected during this outreach effort, although involving a smaller sample size on the community input survey, remain significant as it represents the lived experiences and voices of community members. The narrative highlighted that 31% of survey respondents were from the Albuquerque Westside, and when combined with responses from neighboring areas such as Rio Rancho and the North Valley, this represented 61% of the total sample. While it might seem modest, this representation is substantial given the historical context of educational engagement in these areas. The outreach program was inclusive and aimed at reaching a broad audience reflective of the community demographics, including those who might not have direct, current engagement with the local schools but still hold a vested interest in the community's educational landscape. Although the peer feedback indicated that we received only 21 responses, we recognize that these responses represent 21 individuals who live in this area and had the courage to share their voices. Equip Academy's approach to equity-centered and culturally responsive assessment is grounded in the principle that every piece of data represents a real person with unique experiences and needs. Small sample sizes do not invalidate the importance of these responses; instead, they provide meaningful insights that larger datasets might overlook. By contextualizing the data collected through surveys, focus groups, and one-on-one meetings, we have been able to extract valuable narratives that inform our understanding of the community's educational needs and aspirations.

RESPONSE - Community Engagement

Factual error or misunderstanding (pages 230-239)

Our outreach activities included one-on-one meetings, focus groups, and letters of support from community members. These engagements were not merely for enrollment purposes but were focused on genuinely hearing and understanding the community's concerns and expectations. Many of the individuals we spoke with have lived on the Westside for years and have valuable insights despite not currently having school-aged children. Their experiences and perspectives are critical as they provide a historical context and long-term view of the community's educational challenges and needs. The expectations for the outreach program did not require the Equip Academy team to identify families ready to enroll their children but rather to focus on reaching a representative audience within the community and understanding their needs. Our efforts were centered on engaging a broad cross-section of community members through surveys, focus groups, one-on-one meetings, and gathering letters of support. This approach allowed us to capture a diverse range of perspectives and accurately identify the educational needs and priorities of the community. By doing so, we ensured

our outreach activities were inclusive and reflective of the community’s demographics and needs, rather than solely concentrating on immediate enrollment interests.

RESPONSE – Identified Community Needs

Factual error or misunderstanding (pages 230-239)

Families that are long-time members of the community and the many local organizations that work closely with local families and who deeply know their needs and desires across the community have together been strongly supportive of our proposal. These individuals and grass roots organizations have all identified the community’s education needs such as, their children being able to read, access to school transportation, family and community events, and a school where teachers are trained and prepared – all of which we have responded to and incorporated. We look forward to talking with more families in the months ahead, and we look forward to partnering with these organizations post-authorization as we continue our outreach to and engagement with local families in response to their needs. In listening to local families and to leadership within the various nonprofits across the Westside, we have been able to identify several key needs, which the proposed school addresses.

To highlight, the needs identified through our outreach include a strong desire for high-quality school options on the Westside, a focus on reading and language development, and ensuring that teachers are well-prepared and supported. These needs have been directly incorporated into Equip Academy’s mission and educational model. Our curriculum is designed to address these specific needs by providing a rigorous, inquiry-based educational experience that emphasizes literacy and teacher excellence.

By embedding community collaboration into our school-based curriculum and decision-making processes, Equip Academy ensures that the voices of all community members, regardless of their immediate engagement with the school, are integral to our planning and implementation strategies. This approach addresses enrollment but most powerfully provides Equip Academy with a genuine understanding and informed foundation by which we can address the community's educational needs.

B. Community Support

B.	<u>Evidence of Community Support</u>
Rating	Expectations

Approaches	<p>A complete response must</p> <ul style="list-style-type: none"> ● Include quantitative data that demonstrates community support from a broad audience for this proposed school; ● Include qualitative data that demonstrates community support from a broad audience for this proposed school; ● Include descriptions of the anticipated demographics of the students who will be served by the proposed school, disaggregate the number of prospective students by zip code, school of attendance (current), gender, type of current school (home, private, public), or other pertinent data. ● Ensure the demonstrated support includes support within the community of the specific targeted geographic location; and ● Describe why the applicant team believes the evidence demonstrates the school will be embraced and supported as the community’s school and that there is abundant support for this school as a part of the community.
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The Equip Academy of New Mexico founding team’s response Approaches the expectations for this section.

- There is no disaggregated data on the number of prospective students by zip code, school of attendance, type of current school (home, private, public) or any other pertinent data
- Although demographics of the area were provided, it is unclear as to how many kindergarten-aged or elementary school students are available to attend to calculate if the projected membership for each grade is realistic or inflated.

RESPONSE – Disaggregated Data and Available Grade-Level Students

Clarification (pages 4, 5)

While it was noted that there is no disaggregated data on the number of prospective students by zip code, school of attendance, type of current school (home, private, public), or any other pertinent data, Equip Academy has provided comprehensive demographic information throughout the application, and specifically in FIGURES 1, 2, and 3.

This data includes a detailed breakdown of the local community’s economic, educational, and ethnic composition. We are including those figures again below.

FIGURE 1 - Economics, Demographics, and Education – Comparative Analysis⁷

Demographics	Zip code 87105	Zip code 87121	Albuquerque
Median Family Income	\$21,689	\$21,520	\$56,366
% Hispanic	79%	83%	49.8%
High School Graduates	78.7%	81.1%	90.9%
Bachelor’s Degree or Higher	15.4%	13.2%	37.4%

⁷ (U.S. Census Bureau QuickFacts: Albuquerque city, New Mexico).

FIGURE 2 - Student Population of Target Geographical Area⁸

Student Subgroup	Enrollment in Schools in Target Area
Hispanic	83%
White /Caucasian	8.5%
American Indian/Alaskan Native	3.9%
Black/African American	2.1%
Two or More Races	1.3%
Eligible for Free/Reduced Lunch	96.4%
English Learners	30.9%
Special Education	21.7%

FIGURE 3 - Student Demographics and Proficiency Rates in Proposed Community⁹

Student Subgroup	ELA/Reading Proficiency in Target Area Schools	APS ELA/Reading Proficiency	Math Proficiency in Target Area Schools	APS Math Proficiency
Hispanic	26.1%	33.1%	13.4%	18.4%
White/Caucasian	32.4%	64.8%	26.8%	50.0%
American Indian/Alaskan Native	23.6%	22.5%	8.8%	11.4%
Black/African American	18.7%	30.1%	3.8%	15.6%
Two or More Races	27.5%	51.5%	13.7%	38.4%
Free/Reduced Lunch	25.6%	28.8%	13.6%	15.4%
English Learners	18.4%	17.1%	8.6%	8.9%
Special Education	5.4%	10.1%	3.8%	5.7%
Overall Results	26.1%	40.0%	14.3%	25.7%

As noted within the application, our intended enrollment at full capacity is 75 students at each grade level, and for clarity, this represents a small share of local student enrollment.

School Name	Pre-K	Kindergarten	First Grade
Rudolfo Anaya	44	83	78
Lavaland	32	58	57
Atrisco	14	28	28
Valle Vista	68	39	33
Alamosa	18	60	49
Helen Cordero	97	103	121

⁸ [New Mexico Public Education Department 2022-23 Enrollment Subgroup Percentages.](#)

⁹ [Workbook: NM-MSSA Results \(tableau.com\).](#)

Carlos Rey	28	75	68
M. A. Binford	22	75	63
Armijo	17	36	47
Navajo	16	55	48
Painted Sky	18	73	103
Tres Volcanes	0	78	62
Marmon	17	77	89
Chaparral	35	50	56
TOTAL ENROLLMENT	426	890	902

Equip Academy has based its enrollment projections on data obtained from the National Center for Educational Statistics (NCES), a reputable and reliable federal entity known for its comprehensive and accurate educational data. The NCES provides critical public data into student demographics and enrollment trends, ensuring that our projections are grounded in reliable and current data.

This information is crucial for accurately forecasting the potential student population for each grade level. The NCES data, combined with our community surveys and focus groups, provides a robust foundation for these projections. This analysis has allowed us to create realistic enrollment projections for each grade. Further, our outreach efforts and engagement with the community have provided a solid understanding of the local population’s needs and support levels.

In addition, Equip Academy has conducted extensive outreach activities, including meetings with local organizations, businesses, and families. These activities are documented with evidence of implementation, showcasing the broad support we have garnered from the community. Our outreach program was designed not only to find families interested in enrolling their children but to understand the needs and aspirations of the community comprehensively. This aligns with the criteria to develop community support for the proposed school.

Demonstration of Community Engagement:

1. Quantitative and Qualitative Data:

- We have connected with 245 community members through various engagement methods (survey, focus groups, one-on-one meetings).
- This does not include the additional 134 letters of support.
- Our survey included responses from individuals across different parts of Albuquerque, ensuring a representative sample.

2. Understanding Community Needs:

- Through our engagement activities, we have identified key needs such as the demand for high-quality school options, a focus on reading and language development, and the importance of well-supported teachers.
- Our outreach efforts were aimed at genuinely understanding these needs rather than just enrolling students, reflecting a deep commitment to community-centric planning.

3. Realistic Enrollment Projections:

- Our enrollment projections are based on a thorough analysis of local demographic data, including the number of school-aged children and the community's support for new educational options.
- This approach ensures that our projected membership for each grade is both realistic and grounded in actual community data.

Our understanding of the community's needs and our realistic enrollment projections underscore the robustness of our planning process. We believe this evidence demonstrates that Equip Academy will be embraced and supported as a valuable addition to the community. We are grateful for the opportunity to further clarify these details here.

C. Community Relationships

C.	<u>Networking with Community</u>
Rating	Expectations
Meets	<p>A complete response must</p> <ul style="list-style-type: none">● Identify and describe specific meaningful and strategic networking relationships with local community agencies, groups, or individuals that will support the school. Include evidence of these relationships.● Identify and describe specific meaningful and strategic resource agreements with local community agencies, groups, or individuals that will support the school. Include evidence of these relationships; and● Describe why the applicant team believes the identified relationships demonstrate the school will be embraced and supported as the community's school and that there is abundant support for this school as a part of the community.

The Equip Academy of New Mexico founding team's response Meets the expectations for this section.

D. Capacity Interview

PLEASE NOTE

The Founding Team had been informed via a calendar invite from Melissa Brown at the NMPED Charter Schools Division that the Capacity Interview would be four hours.

At the start of the interview, we were informed by Ted Farnath that the interview we were about to begin would be three hours, inclusive of 20 minutes of opening and closing statements, leaving 160 minutes or 2 hours and 40 minutes for the interview itself. The unanticipated loss of 25% of interview time, but no reduction in the number of questions to be addressed, often caused the team to truncate their responses.

In addition, due to the shortened time, the last several responses (16-20) needed to be deeply abbreviated, with only a few minutes left in the interview. The reviewers' comments for these questions are uniform and indicative of this unexpected time constraint.

Given the previously unannounced time abbreviation, we provide further clarity here as needed.

1.	What is the most important contribution your proposed school will bring to public education in the community in which you propose to operate? How will this contribution be essential to the success of the proposed school?
Meets	Independent Review Team Comments: The applicant team fully responded to all the components of the question.
2.	How will you evaluate whether your mission and implementation of it are working?
Approaches	<p>Independent Review Team Comments:</p> <p>The mission statement: By providing a top-tier, inquiry-base, college-preparatory education, Equip Academy of New Mexico ensures K-5 students master the knowledge and skills to dream audaciously, engage deeply, and pursue a life of purpose.</p> <p>The applicant team expanded on their mission statement as a guide for the entire academic program noting that evaluation of the assessment data will drive instruction, teacher professional development and implementation of corrective action. Inquiry-based instruction, fiscal health and responsiveness to the community were also briefly addressed. The applicant team did not, however, address the “softer parts” of the mission statement that included mastering the knowledge and skills to dream audaciously, engage deeply, and pursue a life of purpose and how that might be evaluated.</p> <p>RESPONSE – Mission Evaluation</p> <p>Additional information / update</p> <p>Thank you for your feedback. We understand the importance of focusing on academic excellence and ensuring our students develop broader skills and mindset articulated in our mission statement. To address the "softer parts" of our mission, Equip Academy of New Mexico has several strategies and evaluation methods that relate to more of these social-emotional factors:</p> <ol style="list-style-type: none"> Character Development Program: We will integrate a character education program that focuses on fostering resilience, curiosity, and engagement. This will include regular classroom discussions, reflections, and activities centered on our core values of Excellence, Questioning, Urgency, Independence, and Partnership & Perseverance that is a component of our inquiry-based instructional model. Social-Emotional Learning (SEL) Assessments: We will incorporate SEL assessments to measure students' growth in areas such as self-awareness, self-management, social awareness, relationship skills, and responsible decision-making. These assessments will provide insights

	<p>into students' ability to dream audaciously, engage deeply, and pursue their passions as a part of our inquiry-based instructional model.</p> <ol style="list-style-type: none"> 3. Student Portfolios: Each student will maintain a portfolio that includes academic achievements, personal goals, reflections, and projects. This portfolio will be reviewed regularly with teachers and parents to track progress in both academic and personal development. 4. Community Involvement and Projects: Students will participate in community service projects and other extracurricular activities that encourage them to apply their learning in real-world contexts. These experiences will be documented and evaluated as part of their overall development. 5. Feedback from Multiple Stakeholders: We will gather feedback from students, parents, and community members to assess how well our students are embodying the skills and attitudes outlined in our mission. This process will involve comprehensive surveys, interviews, and focus groups, integral components of the Culture & Equity Council and our partnerships with community organizations. These efforts will ensure that Equip Academy continuously meets the evolving needs and expectations of our community. 6. Celebration of Achievements: We will hold regular ceremonies and events to celebrate students' achievements in both academic and personal growth. These events will highlight examples of students dreaming audaciously, engaging deeply, and pursuing lives of purpose. <p>Equip Academy has these strategies built into the educational program and will ensure that we are achieving high academic standards and nurturing well-rounded individuals who are prepared to succeed in all aspects of life.</p>
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<p>3.</p>	<p>What role does a governing body play in the success of a charter school? Describe your strategic process for identifying and selecting members. How will this process support the success of your proposed school?</p>
<p>Meets</p>	<p>Independent Review Team Comments: The applicant team fully responded to all the components of the question.</p>
<p>4.</p>	<p>What role does the school leader play in the success of a charter school? Describe your strategic process for identifying and selecting her/him. How will this process support the success of your proposed school?</p>
<p>Meets</p>	<p>Independent Review Team Comments: The applicant team fully responded to all the components of the question.</p>
<p>5.</p>	<p>How does a high-quality process to evaluate the effectiveness of the governing body and the school contribute to the success of a charter school? Describe your strategic process for conducting these evaluations. How will these processes support the success of your proposed school?</p>

<p>Meets</p>	<p>Independent Review Team Comments: The applicant team fully responded to all the components of the question.</p>
<p>6.</p>	<p>Please explain the delineated roles and responsibilities of, and the relationships between, the founders, the governing body, and the proposed school’s administration during the transitional period between the planning/implementation year and the first year of operations. Describe how those relationships evolve to ensure the success of the charter school.</p>
<p>Approaches</p>	<p>Independent Review Team Comments: The applicant’s response to this question left the independent review team with the impression that the founders might be more involved in the school than permitted during the transitional period. They spoke of bylaws and policies that would guide the governing body. However, the following paraphrased statement raised some concern: I want to emphasize that in our start-up year . . . we as a board are going to be working more closely with our head of school than we ever will again and that’s really out of necessity. Without hired staff, it’s on us as a board to support these really critical tasks for getting ready to open our doors as a school.</p> <p>RESPONSE – Governance and Management</p> <p>Factual error or misunderstanding</p> <p>We are pleased to further clarify our response in this document.</p> <p>The Board is the governing body of the school, responsible for the financial and academic success of the school and conducting that responsibility through providing governing oversight, establishing policy, as well as hiring, setting compensation for, and evaluating the Head of School, who reports to the Board, and to whom the Board delegates all management decisions and responsibilities regarding processes and procedures for and implementation of policies at the school level. The Head of School is the only role hired by and reporting to the Board; all other school positions will be hired by and report to the Head of School.</p> <p>During the start-up year prior to the first year of operation as with all years of school operation, the Head of School will lead and be accountable for all management decisions and responsibilities.</p> <p>Per the details of the specific question regarding the transitional period and the evolving relationships here, during the charter application phase, the proposed Head of School and the proposed Governing Board have worked together as a Founding Team to develop the school proposal and engage the community in all of our outreach efforts. Upon charter approval, we will transition into first a Governing Board, passing our bylaws, installing our officers, and establishing our committees, and operating under all Open Meeting requirements, and then the Governing Board will approve the job description for, and set contractual agreement details with, including compensation details for the Head of School, who will then report to the Board. It is critical that we then operate within clearly prescribed roles, each ensuring from our distinct roles and sets of responsibilities the success of the charter school. Also worth noting, the governing board members are volunteers and that as such, they are committed to dedicating their time and expertise to support the proposed Head of School with</p>

	specific start-up efforts as appropriate, separate and apart from their governance duties, which is a great asset during a planning year.
7.	Explain the importance of by-laws and policies to the success of a charter school. Describe the strategic processes the proposed school will use to establish, implement and update them and how these will contribute to the success of the proposed school.
Meets	Independent Review Team Comments: The applicant team fully responded to all the components of the question.
8.	How will the proposed school ensure that policies and procedures are not only compliant, but also well implemented, current, and effective? How will the proposed school determine when they are in need of change and how will it react?
Meets	Independent Review Team Comments: The applicant team fully responded to all the components of the question.
9.	Describe your plan for acquiring a facility and ensuring that the facility meets educational occupancy standards required by applicable New Mexico construction codes and the weighted New Mexico Condition Index. Whose responsibility will it be to carry out this major piece of opening a charter school? Please include details about locating, securing, and funding the facility.
Approaches	<p>Independent Review Team Comments: The applicant founding team has established a task force that is working with Homewise and a Budget Support Specialist. Six possible facilities have been identified. The team states: "We cannot rely on one option until we've signed the lease." Details about construction code, the weighted New Mexico Condition Index, E-Occupancy, securing and funding the facility were not specifically addressed.</p> <p>RESPONSE – Facility</p> <p>Clarification Equip Academy is partnering with Homewise, a Community Development Financial Institution (CDFI) non-profit, to help select and secure the new school facility. Homewise offers a comprehensive suite of services as part of their Charter School Initiative developed in the service of charter school operators needing facilities technical assistance. For Equip Academy, Homewise’s real estate development team is helping with site selection, including construction feasibility, financial feasibility, and regulatory compliance, such as zoning, parking adequacy, and E-occupancy. As Homewise has already helped two high-performing charter schools secure long-term facilities, they have a thorough understanding of the continuum of facilities needs.</p> <p>For the site selection process, Equip Academy and Homewise are studying factors such as facility condition, educational adequacy, location appropriateness, anticipated repair costs (by utilizing a Facility Condition Index) and occupancy type. Homewise has the technical expertise to help identify suitable properties quickly, ones that complement the New Mexico Educational Adequacy Standards as well as meet the educational programming of Equip Academy.</p>

	<p>Thank you for the opportunity to further expand upon our response regarding the facility and all requirements associated with it.</p> <p>While we cannot know at the time of charter submission what our final facility location will be, we do ensure that regardless of the final facility as ultimately selected, it will meet all applicable construction codes and it will meet all elements of the New Mexico Condition Index to ensure e-occupancy ready.</p> <p>As the securing of a facility lease requires that we incur a contractual obligation, the Board is responsible for the final decision on the facility, and will delegate much of the responsibility for researching and narrowing facility options in its management role as it works with a facility task force, inclusive of but not limited to Board membership, as well as the real estate expertise of Homewise, which will be contracted by the Board to fill this role, as well as K12 Accounting regarding all financial implications, which the will also be contracted by the Board. Any final facility options will be examined by the Board, to ensure that the facility not only fulfills all regulatory requirements but that it also meets the needs of our community and our academic program. As satisfied that both are true, the Board will sign a lease for the chosen facility.</p> <p>Per funding the facility, the Excellent Schools New Mexico grant will cover those costs and are reflected in the budget in Fund: 26999 and Function: 2600.</p>
<p>10.</p>	<p>If you cannot find a building that meets the need of the plan described in the PSFA (Public School Facilities Authority) approval, what is your next steps plan?</p>
<p>Approaches</p>	<p>Independent Review Team Comments:</p> <p>The applicant founding team indicated that if a building that meets the needs of the plan cannot be found, criteria will be reprioritized based on the availability of facilities without affecting the school’s mission and vision. A detailed next steps plan, however, was not identified.</p> <p>RESPONSE – Building Plans</p> <p>Additional information / update</p> <p>The proposed Head of School, Facilities Task Force, and Founding Board will hold a dedicated meeting to discuss the outcomes of site tours and network outreach if they cannot find a building that meets the needs of the plan. This meeting will focus on identifying areas where criteria can be reprioritized without compromising the school's mission and vision. Alternative plans based on available facilities, considering potential compromises such as starting with a smaller facility, will be drafted. This team will evaluate the feasibility and impact of each alternative on school operations and community accessibility.</p> <ul style="list-style-type: none"> • The team will review all gathered information and alternative plans to make a final decision on the most suitable facility option. The Founding Board will formally approve the selected facility. Once decided the Board

	<p>will initiate lease or purchase negotiations for the chosen facility, ensuring all legal and financial aspects are reviewed and finalized.</p> <ul style="list-style-type: none"> • The proposed Head of School, Facilities Task Force, architects, and contractors will begin necessary renovations or modifications to the facility, ensuring it meets all regulatory and safety standards. They will plan and execute the move into the new facility, setting up classrooms, administrative offices, and other essential spaces. <p>Throughout this process, the proposed Head of School and Founding Board will keep the school community informed about progress and the timeline for moving into the new facility. They will also organize an open house or tour for families and community members once the facility is ready, ensuring transparent and ongoing communication.</p>
<p>11.</p>	<p>How are you going to open your proposed school without federal start-up funds? Does the proposed school have a plan to supplement its budget in some way? Does the proposed school have a plan to acquire funding necessary to accomplish planning/implementation year requirements (setting up a bank account, acquiring furniture, having software systems in place to interface with PED’s OBMS system, etc.)?</p>
<p>Approaches</p>	<p>Independent Review Team Comments: The applicant group’s response indicated that, if approved by the Public Education Commission, the school would receive a one-time, \$350,000 unrestricted grant from Excellent Schools New Mexico. At the time of the interview, the applicant team did not have verification of the grant funding. However, Scott Hindman, Executive Director of Excellent Schools New Mexico provided a letter verifying the \$350,000 unrestricted grant award. The applicant group plans to use some of the award funds for start-up expenses.</p> <p>RESPONSE – Start Up Funds</p> <p>Factual error or misunderstanding</p> <p>Scott Hindman, Executive Director of Excellent Schools New Mexico, verified by a letter dated June 19, 2024, that Excellent Schools New Mexico will make a one-time \$350,000 unrestricted grant to Equip Academy of New Mexico upon Equip Academy of New Mexico's successful charter application authorization by the New Mexico Public Education Commission. Mr. Hindman received an email from Melissa Brown at NM PED’s Charter School division, confirming receipt and therefore knowledge of the fund, and stating that the letter was sufficient to meet the reasonability of grant funding, which fully satisfies the question.</p> <p>We are grateful for the funding from Excellent Schools NM pending charter approval, and we intend on using those funds during the planning year primarily for transportation. We understand that is one of the main challenges charter schools face in the first year, and that impacts enrollment and equitable access to the school. We will also utilize the funds for other start-up expenses the proposed school needs such as furniture, curriculum, and initial facility costs. We have three (3) grant writers on our board and will utilize their skill sets to apply for applicable grants as well. We then engaged with our contractor K12 Accounting to more fully populate, inform, and finalize the budget details as well as support with setting up a bank account, having software systems in place to interface with PED’s OBMS system and to ensure compliance.</p>

<p style="text-align: center;">12.</p>	<p>In detail describe how you will make enrollment projections to establish and submit your first budget to PED? How will you ensure these enrollment projections are reasonable and align closely to your actual 40 day count?</p>
<p style="text-align: center;">Does not meet</p>	<p>Independent Review Team Comments: The applicant team provided an extensive number of outreach events and activities that were being planned in the community. However, the response did not represent a clear and cohesive plan to ensure the enrollment projections are reasonable and will align closely to the proposed school’s 40-day count.</p> <p>RESPONSE – Enrollment Projections</p> <p>Additional information / update</p> <p>To ensure alignment with the 40-day count, we will implement weekly check-ins on enrollment numbers starting six weeks before the school opening, using data from these check-ins to make necessary adjustments in outreach efforts. Final adjustments will be made one month before the 40-day count, intensifying outreach and engagement activities to fill any remaining enrollment gaps and ensuring all enrolled students are prepared and confirmed for attendance through follow-up communications. By integrating these strategies, Equip Academy will create an adaptive enrollment plan that sets realistic projections and aligns closely with actual enrollment numbers, ensuring financial and operational stability from the outset.</p>
<p style="text-align: center;">13.</p>	<p>Suppose your actual enrollment on the first day is 50% below your pre-opening “enrollments” and 70% below your projections used to submit your budget. What are the implications for your budget/business plan and what are your next steps? Describe in detail what actions you would take and when you would take them to address this situation.</p>
<p style="text-align: center;">Does not meet</p>	<p>Independent Review Team Comments: The applicant team’s response partially addressed the question and included some options to cut back on hiring. They have worked with a model provided by K-12 Accounting that would assist with cutting expenses if the enrollment targets are not reached. However, the response did not include a clear, detailed action plan to address the situation as described.</p> <p>RESPONSE – Enrollment and Budget Implications</p> <p>Additional information / update</p> <p>First, we will implement rigorous enrollment monitoring, with intensified efforts starting six months before the school opens. The Proposed Head of School and volunteer ambassadors will oversee a robust enrollment tracking system to monitor applications and confirmations in real-time. Bi-weekly reviews of enrollment data will help identify trends and potential shortfalls early, allowing us to take proactive measures. In the event of a potential shortfall, we will immediately enhance our outreach efforts. This will include launching targeted marketing campaigns, such as social media ads and community events to boost enrollment. We will also host additional open houses and information sessions to attract more applicants. Our Head of School and ambassadors will engage community leaders and influencers to advocate for the school and encourage</p>

	<p>enrollments, leveraging local media outlets to raise awareness and promote the school’s offerings.</p> <p>Financial contingency planning will be a critical component of our strategy. We will conduct monthly budget reviews to identify areas where expenses can be reduced without compromising essential services. The Proposed Head of School and Finance Committee will prioritize spending to focus on critical operational needs and delay non-essential expenditures. Staffing adjustments will be made as needed, with a phased hiring approach to align with actual enrollment numbers. Existing staff may be reassigned to cover critical areas, ensuring all essential functions are maintained.</p> <p>To further support our financial stability, we will seek additional funding sources, such as grants, donations, and partnerships with local businesses. The Founding Board and Development Officer will establish relationships with community organizations and stakeholders who can provide support or resources. We will also collaborate closely with K-12 Accounting to model various financial scenarios and adjust the budget as needed, utilizing their expertise to implement best practices in financial management and expense reduction. Continuous evaluation and adjustment will be key to our approach. The Proposed Head of School, Founding Board, and Finance Committee will conduct regular progress reviews to assess the effectiveness of implemented strategies and make necessary adjustments. Transparency with all stakeholders will be maintained through regular updates on enrollment and financial status.</p>
<p>14.</p>	<p>Describe the organizational steps the proposed school will take during the planning year to be ready for opening?</p>
<p>Meets</p>	<p>Independent Review Team Comments: The applicant team fully responded to all the components of the question.</p>
<p>15.</p>	<p>Describe how you approached the delineation of roles & responsibilities for staff. How will you attract the talent and skills needed to implement the school as described?</p>
<p>Approaches</p>	<p>Independent Review Team Comments: The applicant team stated that the organizational structure is highly supportive and needs based. Many positions and needs were described in the response, including some possibilities for attracting the talent and skills needed. However, a clear and cohesive response did not emerge.</p> <p>RESPONSE – Skills and Talent Needed as per Roles and Responsibilities</p> <p>Additional information / update</p> <p>Positions and highlighted abilities/skills needed for school success:</p> <ul style="list-style-type: none"> • Head of School (proposed Mercy L. Herrera): Ability to hire, train, support, and manage a mission-aligned team; ability to select and implement curricula that will support our ambitious goals; ability to

	<p>develop and implement a highly effective professional development plan that supports teacher development and propels student outcomes; ability to be accountable to a governing body; ability to communicate effectively with a wide range of stakeholders and community members; ability to create an equitable school community in which all students are seen, valued, and succeed</p> <ul style="list-style-type: none"> ● Business Manager/Assistant Business Manager (fulfilled by K12 Accounting): Ability to provide the Head of School and Board with all the financial resources for healthy decision making, ability to ensure school compliance with all applicable regulations; ability to effectively manage financial resources for our academic program ● Lead Teachers: Ability to discuss, prepare, practice, and immerse themselves in rich academic content through an inquiry-based lens; ability to wear the hat of a facilitator and truly listen to what students are saying, creating a space for students to think their way through to answers and praising their insights and curiosities along the way; ability to be coached and engage deeply in transformative professional development; ability to effectively communicate with all families on behalf of their student’s success ● Special Education Teachers: Ability to provide direct support and modified instruction as needed to students with IEPs for progress toward achievement and success; ability to communicate IEP growth to families and support strong school to home communication at all times ● Instructional Assistants: Ability to provide more support to lead teachers in the classroom, with a constant focus on student growth and success ● Operations Team (Office Assistant, Office Manager, Manager of Operations): Ability to manage all the non-instructional elements of the school, ensuring that the Head of School can focus on students and teachers and the overall success of the academic program ● Assistant Principal in Residence/Assistant Principal: Ability to serve as an additional instructional leader with all of the associated responsibilities when the school reaches maximum capacity. ● Education Coordinator: Ability to oversee special education services, ancillary services and testing accommodations and logistics ● Enrichment Providers: Ability to provide a rich set of extracurricular and cultural enriching opportunities and experiences to our students. <p>We intend to hire Mercy Herrera as our founding Head of School and we have established a relationship with K12 Accounting, with whom we intend to contract post-authorization as outlined in the charter application.</p> <p>For attracting other talent and skills as outlined above, we will implement a multi-faceted recruitment strategy to attract highly qualified licensed staff. Strategies may include advertising vacancies through various channels (online job boards, educational networks, social media platforms) and partnerships with local colleges and universities. We will also attend job fairs and hosting recruitment events in order to connect with a wide pool of potential candidates.</p>
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	<p>In addition, it is critical to our success that we recruit a diverse team embodying these skills. There are several key approaches that we will take to attract quality and diverse teachers:</p> <ul style="list-style-type: none"> ● We will attract diverse teachers through institutional partnerships and data use. ● We will establish and build relationships with teacher preparation programs that enroll a diverse student body, such as UNM, CNM and alternative teacher preparation programs. ● We will recruit through an early hiring process to generate a larger applicant pool, as the more applicants generally increases diverse applicants.
16.	Explain how the proposed school will apply phonics to students who don't enter the school speaking English?
Does not meet	<p>Independent Review Team Comments: The applicant team's response did not directly address the specific question.</p> <p>RESPONSE - Phonics and English Language Learners</p> <p>Additional information / update (abbreviated time and shortened interview window disallowed a full and detailed response at time of interview)</p> <p>We appreciate the opportunity to provide more detail here.</p> <p>Equip Academy of New Mexico is committed to providing high-quality education to all students, including English Learners (ELs). Our approach integrates structured literacy instruction and comprehensive support to ensure that students who do not enter the school speaking English can achieve proficiency in both spoken and written English. It is built into our inquiry-based instructional model.</p> <ol style="list-style-type: none"> 1. Structured Literacy Instruction: <ul style="list-style-type: none"> ○ Phonics and Phonemic Awareness: Our literacy program includes daily phonics and phonemic awareness sessions. We utilize the Success for All phonics curriculum, which is designed to teach letter-sound connections, blending, segmenting, and concepts of print. This direct instruction in small groups ensures that students receive personalized attention and practice, which is critical for ELs. ○ Multisensory Learning: We incorporate multisensory approaches to reinforce phonics instruction, such as visual aids, auditory activities, and kinesthetic exercises. These methods help ELs connect sounds with letters and words, making the learning process more engaging and effective. 2. Language Acquisition Support: <ul style="list-style-type: none"> ○ Phonics and small group instruction will be provided in English. Students will be grouped in small homogeneous groups of similar English language skill to reach the needs of all students, including

	<p>non-English speaking students. For example, if an EL kindergartener student speak only their home language and is therefore working on developing their English language skills, they will be placed in an AA or A reading group to provide the needed supports for helping them to learn English structure, allowing them to work in a targeted and supportive way on foundational phonemic awareness, letter sound/identification, background knowledge, word-solving CVC skills and key vocabulary.</p> <p>3. Assessment and Progress Monitoring:</p> <ul style="list-style-type: none"> ○ Regular Assessments: ELs are regularly assessed using tools such as the WIDA (World-Class Instructional Design and Assessment) to monitor their English language development in listening, speaking, reading, and writing. These assessments guide instruction and help identify areas where additional support is needed. ○ Data-Driven Instruction: Assessment data is used to inform instruction and provide timely interventions. Teachers use this data to create individualized learning plans that address each student’s specific needs. <p>4. Professional Development:</p> <ul style="list-style-type: none"> ○ Ongoing Training: All teachers at Equip Academy receive ongoing professional development in best practices for teaching ELs. This includes training in the Science of Reading, differentiated instruction, and culturally responsive teaching. Teachers are equipped with the skills and knowledge to support ELs effectively. <p>5. Family and Community Engagement:</p> <ul style="list-style-type: none"> ○ Bilingual Communication: We maintain strong communication with EL families by providing bilingual newsletters, parent-teacher conferences, and community events. This ensures that families are engaged in their children’s education and can support their learning at home. ○ Cultural Inclusivity: Equip Academy celebrates the diverse cultural backgrounds of our students. We incorporate multicultural content into the curriculum and host events that recognize and honor the heritage of our EL students. <p>By implementing these comprehensive strategies, Equip Academy of New Mexico will adapt phonics instruction, along with other aspects of our academic program, in ways that ensure that English Language Learners receive the support they need to master phonics, develop English proficiency, and achieve academic success.</p>
17.	Without a grant, how will EQUIP purchase all of the equipment, computers, furniture needed before day 1 of 1st school year?
Does not meet	Independent Review Team Comments: The applicant team’s response did not directly address the specific question.

	<p>RESPONSE – Purchases Prior to Day 1</p> <p>Additional information / update (abbreviated time and shortened interview window disallowed a full and detailed response at time of interview)</p> <p>We appreciate the opportunity to provide more detail here.</p> <p>All equipment, computers, furniture, ect., will be purchased with a secured Excellent Schools New Mexico Grant of \$350,000. We have budgeted for all necessary purchases to be made prior to day 1 of our first year of operation in conjunction with the guidance of K12 Accounting. These expenditures will be in the 26999 fund in our budget.</p>
<p>18.</p>	<p>How will the curriculum be specifically modified to ensure culturally and linguistically responsive instruction across all minority groups that this charter wants to address.</p>
<p>Does not meet</p>	<p>Independent Review Team Comments: The applicant team’s response did not directly address the specific question.</p> <p>RESPONSE - Modification of Curriculum to be Culturally and Linguistically Responsive</p> <p>Additional information / update (abbreviated time and shortened interview window disallowed a full and detailed response at time of interview)</p> <p>We appreciate the opportunity to provide more detail here.</p> <p>Equip Academy's inquiry-based instructional model is inherently culturally responsive, designed to embrace and reflect the diverse backgrounds of our students. The curriculum will be modified to ensure culturally and linguistically responsive instruction by integrating culturally relevant materials and pedagogical practices.</p> <p>Teachers will receive professional development in culturally responsive teaching through the Institute for Educator Excellence, ensuring they use students' customs, characteristics, experiences, and perspectives as instructional tools.</p> <p>The curriculum will include texts and materials that represent diverse cultures and perspectives, promoting a sense of belonging and respect for all students. Additionally, the school will implement a culturally responsive framework that includes field studies and community events focused on the specific cultures of New Mexico, fostering an appreciation for cultural heritage. This approach ensures that all students see themselves reflected in the curriculum and feel valued and supported in their learning environment. Some examples are:</p> <ol style="list-style-type: none"> 1. Closing the Achievement Gap: <ul style="list-style-type: none"> ○ Data-Driven Instruction: We focus on closing the achievement gaps among students. Current ELA proficiency rates in our target community are: Hispanic students 26%, Black students 18%,

	<p>Native American students 23%, EL students 18%, and Special Education students 5%. With research- and evidence-based curriculum and comprehensive language acquisition programs, we address the achievement gaps amongst traditionally underserved groups in ELA and Math through innovative and responsive approaches.</p> <ul style="list-style-type: none"> ○ Inquiry-Based Learning: By valuing student voices in the classroom, we encourage inquiry-based learning that engages students and makes learning relevant to their experiences. <p>2. Celebrating Diversity:</p> <ul style="list-style-type: none"> ○ Community Circles: We incorporate opening, closing, and community circles that center joy and foster learning about oneself and others, building a strong, supportive community. ○ Culturally Relevant Texts: Our curriculum includes culturally relevant texts that resonate with our students' identities, enhancing engagement and learning. <p>3. Culture Immersion:</p> <ul style="list-style-type: none"> ○ Field Studies: We provide cultural immersion experiences through field studies at places like the Indian Pueblo Cultural Center and the Hispanic Cultural Center. ○ Community Partnerships: Partnerships with organizations such as the National Institute of Flamenco, Global Give a Book, and Bosque Nature Reserve offer students rich, culturally immersive learning opportunities.
19.	<p>Your expenditures far exceed your revenue, what budget cuts will you make to balance your budget? If you don't get a grant, how will you incorporate those expenditures in an already overextended budget?</p>
Does not meet	<p>Independent Review Team Comments: The applicant team's response did not directly address the specific question.</p> <p>RESPONSE – Budget</p> <p>Factual error or misunderstanding</p> <p>(additionally, abbreviated time and shortened interview window disallowed a full and detailed response at time of interview)</p> <p>We appreciate the opportunity to provide more detail here.</p> <p>We believe that this question is in response to a misunderstanding of the budget as submitted. Our budget as submitted is conservative, balanced, and has excess revenue and cash carryover each year to help ensure fiscal health and sustainability in the event of any contingencies.</p> <p>Also, we have secured the \$350,000 grant commitment from Excellent Schools New Mexico as addressed above.</p>

	<p>Embedded within this question, however, is the real challenge that all charter schools face, and particularly in start-up, and that is when projected revenues do not match actual revenues, which most commonly is a result of under-enrollment.</p> <p>Given this reality, first we will implement a phased hiring approach to match staffing levels with actual enrollment. This strategy involves delaying or reducing non-essential hires, such as administrative and support staff, until enrollment and revenue targets are met. Additionally, existing staff will be reassigned to cover critical areas, ensuring that essential functions are maintained without the need for additional hires.</p> <p>Operational expenditures will be closely scrutinized, with a focus on prioritizing spending on essential services that directly impact student learning and safety. Non-essential expenditures, such as certain extracurricular activities and discretionary supplies, will be postponed or scaled back as needed. We will also renegotiate contracts with vendors and service providers to achieve cost savings, exploring options for deferred payments or reduced service levels.</p> <p>In terms of facility costs, we will consider operating in a smaller facility initially to reduce rental and maintenance expenses if necessary. Plans for moving to a larger, permanent facility can be deferred until we achieve financial stability. Additionally, we will implement energy-saving measures and defer non-essential maintenance to further reduce facility-related costs.</p> <p>We will intensify efforts to obtain alternative funding through local fundraising campaigns, donations from community members, and partnerships with local businesses. We will also actively seek other grant opportunities and apply for multiple funding sources to diversify our financial base and reduce reliance on a single grant.</p> <p>Community and stakeholder engagement will play a crucial role in our contingency planning. We will leverage community support by engaging with community leaders and stakeholders to secure in-kind donations and volunteer support, reducing costs associated with certain services and programs. Additionally, we will explore structured voluntary contributions from parents and guardians to support specific programs or activities, ensuring transparency and maintaining affordability.</p>
<p style="text-align: center;">20.</p>	<p style="text-align: center;">What are your plans for providing Special Education services in year 1 and 2?</p>
<p>Does not meet</p>	<p>Independent Review Team Comments: The applicant team’s response did not directly address the specific question.</p> <p>RESPONSE – Special Education Services in Y1 and Y2</p> <p>Additional information / update (abbreviated time and shortened interview window disallowed a full and detailed response at time of interview)</p>

We appreciate the opportunity to provide more detail here.

While our initial intent was to contract for these needs in Y1 and Y2 given our small school size (75 students in Y1), we do recognize and have adjusted our staffing plan and all budgetary implications to provide for a Special Education teacher on our staff from the very first year of operation. In Year 1, we will have a full time Special Education Teacher. We will also have 3 full time lead teachers and 2.5 instructional assistants. These teachers will play a critical role in ensuring that all students with identified special needs, including those who are gifted, receive the necessary support to succeed. Additionally, we will contract with various service providers as needed to support our students' diverse needs. This approach allows us to be flexible and responsive to the specific requirements of our student population. In Year 2, we will hire a full time Special Education Teacher and maintain our partnerships with service providers to ensure continuity and stability in the services provided. We will also hire a Education Coordinator for Year 2 to ensure proper oversight over the SAT team. Our commitment to robust Special Education services is detailed in the application, particularly on pages 77-79