

New Mexico Public Education Commission



2024-25 IMPLEMENTATION YEAR CHECKLIST

**Requirement for authorization to commence full operations
for charter schools authorized by the Public Education Commission**

Equip Academy

June report to the PEC on the status of the IY Checklist

Mercy Herrera and team have successfully completed the November, March and May checklist items. The school was very receptive to feedback and worked to incorporate all of the suggestions given to them by CSD. The school missed the March 1 deadline completely as they thought the 15th was the deadline for all three of the due dates. There was one item from the November checklist that was not completed until after the March deadline. This occurred again with one item from the March checklist not being completed until after May 15th. Overall the school did well and is ready for your consideration for commencement of operations.

Late	Missing	Concerns
2 items plus all of March	None	None

Implementation Year Checklist

Items due by October 1

Indicators	Documentation	Date Complete	Comments
Board of Finance.	<p>✓ Obtain standing as an approved Board of Finance no more than 90 days from the date of the vote for approval of the new application.</p> <p>NMSA § 22-8-38[B]; 6.80.4.16[A] NMAC; PEC Policy</p>	10.18.24	MAB - completed

Items due by November 15

Indicators	Documentation	Date Complete	Comments
11-15.1. Governing Board established, has completed the New Member Training and is operating according to bylaws and in accordance with the Open Meetings Act. <i>NMSA § 22-8B-5.1; 22-8-12.3; 10-15-1;14-2-1, et seq.</i>	<p>✓ List of governing body members. Include the governing body positions to be held, either a place of residence or work, and contact information.</p>	9.9.24	MAB- completed
	<p>✓ Evidence each Board member has completed the 10-hour New Member Course.</p> <p>NMSA §22-8B-5.1</p>	11.15.24	MAB - all are complete
	<p>✓ Bylaws</p> <p>include provision for creating-audit and finance committees.</p>	3.24.25	MAB 11.20.24 I Section 6: How would the board chair resign? Be clear on the date of resignation. I Section 7: thank you

Indicators	Documentation	Date Complete	Comments
<i>Charter Contract</i>	include provision for replacing and removing members NMSA § 22-8-12.3		You need to include a provision regarding action if no quorum is present. A quorum of the board will consist of a simple majority of full board membership. If there is no quorum for a meeting, the board members may discuss business but take no action (no vote), and reschedule (“reconvene”) without altering agenda. Must state exact date and time when the board will reconvene. I recommend adding a provision stating that anyone raising money, engaging with the community, etc., be required to report their activities to the board and or receive permission prior to activities.
	✓ Audit and Finance Committee – Evidence that the sub-committees have been formed, have scheduled meetings, and list of committee membership. NMSA § 22-8-12.3	12.5.24	MAB - 11.18.24 Need to separate the lists
	✓ Evidence the Governing Board has drafted an annual calendar of meetings, key Governing Board tasks, and reporting requirements.	11.18.24	MAB - Completed
	✓ Transparent, annual process for selecting and appointing Equity Council members that reflect student demographics. PED guidance	11.18.24	MAB - Complete
	✓ How the board will ensure that the Equity Council will fulfill their role as advisors ensuring equity including completing readiness	11.18.24	MAB - Complete

Indicators	Documentation	Date Complete	Comments
	assessments, advisement, strategic planning, and CLR inventory and framework responsibilities.		
	<p>✓ Evidence that public notice of meetings, meeting agendas and minutes that comply with state law including live video webcasting of meetings and posting recorded meetings to website</p> <p>NMSA § 22-8B-5.5; NMSA § 10-15-1 F-G, et seq.</p>	11.18.24	MAB - complete
	<p>✓ Annual Open Meetings Act Resolution as well as plan to update annually</p> <p>NMSA § 10-15-1 (D)</p>	1.15.25	<p>MAB - 11.18.24 emailed school re: needing a specific day of the month to be noted. Well done putting the plan to update annually in your Annual Calendar. (The board needs to meet on the ___ of every month. For the “November” meeting will be changed to this date and time” Look at Annual Calendar)</p> <p>Task Complete</p>
	<p>✓ IPRA policy and procedures that comply with state law.</p> <p>NMSA § 14-2-1, et seq.</p>	1.15.25	<p>MAB - 11.18.24 incomplete. You need to include the reasonable fee amount in your policy. Most schools put a dollar/page. You can consider not only the cost of the printing and paper, but also the time of a staff person doing the copying. You should indicate the position title of the person who will be the Records Custodian. Office Manager for example. Think long and hard before assigning this to the Head Admin please.</p> <p>Task Complete</p> <p>“You can come pick up the materials and will cost x amount”</p>

Indicators	Documentation	Date Complete	Comments
	✓ Name of the foundation, name of the principal officers, and their contact information. PEC Policy	11.18.24	MAB - Complete
	✓ Conflict of interest policy and procedures, for the Governing Board and school personnel NMSA § 22-8B-5.2.	11.18.24	MAB - Interested in the potential involvement of the Finance committee.
	✓ Anti-nepotism policy and procedures. NMSA § 22-8B-10.	11.18.24	MAB - Complete
	✓ Background check policy and procedures. NMSA § 22-10A-5.	11.18.24	MAB - Please know that the school is required to pay for all fingerprinting costs. This can be done as a reimbursement. Timeline for teachers. Be clear that this is for employment and the licensure background check also needs to be on file.
11-15.2. Initial Basic Operating Policies and Procedures have been developed and approved by Governing Body.	✓ Evidence the school has begun the process of securing individual ORI Number for obtaining background checks.	11.18.24	MAB - Complete
	✓ FERPA policy and procedures. 20 U.S.C. § 1232g.	11.18.24	MAB - Complete
	✓ Complaint and grievance policy including a process for receiving, tracking, and resolving community, parental, and other public complaints. 6.10.3 NMAC	11.20.24	MAB - complete. Please consider some form of tracker to ensure the timelines are followed.

Indicators	Documentation	Date Complete	Comments
			Missy will send example tracker. Potentially request to see Zoey's policy.
	<ul style="list-style-type: none"> ✓ Volunteer policies and procedures. To include provisions for background check requirements. 6.50.18.8 NMAC. 	11.20.24	MAB - complete
	<ul style="list-style-type: none"> ✓ Bank records or other evidence that shows a public entity account has been established at a NM banking institution. 	11.20.24	MAB - complete
	<ul style="list-style-type: none"> ✓ Tax ID numbers (federal and state). ✓ Nontaxable Transaction Certificates http://tax.newmexico.gov/Businesses/non-taxable-transaction-certificates.aspx ✓ Unique Entity ID (UEI) number required to receive federal funding https://sam.gov/content/duns-uei 	2.13.25	<p>MAB - incomplete 11.20.24 the EIN is different from the NTTC's</p> <p>Click the link and follow directions.</p>
	<ul style="list-style-type: none"> ✓ W-9 Form (submitted to DFA through PED). 	11.20.24	MAB - complete
11-15. 3. School is established as a formal public-school entity in the state of New Mexico with all necessary tax identification numbers, bank accounts, etc. 6.20.2.14 NMAC	<ul style="list-style-type: none"> ✓ Curriculum development plan including 1) timeline, 2) benchmarks, and 3) responsible parties, including an Equity Council, to ensure development of curriculum identified in the application and aligned to mission, goals, and NM Content Standards (to be final May 15). 	2.13.25	<p>KL-11.20.24 Include responsible parties- edit, then this section will be complete.</p> <p>Roles and responsible parties. Add another responsible party (board, other staff, grade team lead, equity council).</p> <p>Reach out to Cindy for their plan.</p>

Indicators	Documentation	Date Complete	Comments
	<ul style="list-style-type: none"> ✓ Special population services development plan, to ensure development of plans, policies, and procedures to serve special education, ELL, and 504 Plans. 	11.20.24	KL- Complete I would use this as an exemplar- it's detailed enough and very organized.
	<ul style="list-style-type: none"> ✓ Assurance the school has consulted with the Indian Education Division to develop any needed policies, procedures, and memoranda to comply with the Indian Education Act. NMSA § 22-23A, 6.35.2 NMAC	11.7.24	MAB - complete
11-15.4 Development Plans. 6.29.1.9B(8) NMAC	<ul style="list-style-type: none"> ✓ Assurance the school has consulted with the Language and Culture Division to determine to develop any needed policies, procedures, and memoranda to comply with processes for identifying, serving and monitoring English Learners NMSA § 22-23B	11.7.24	MAB - complete
	<ul style="list-style-type: none"> ✓ Assurance the school has developed any needed policies, procedures, and memoranda to comply with the Black Education Act. NMSA § 22-23C; 22-10A-19.3	11.7.24	MAB - complete
	<ul style="list-style-type: none"> ✓ Plan including responsible parties, timelines, and action steps for how the governing body will identify, recruit, and hire a prospective head administrator. 	11.22.24	MAB - complete

Indicators	Documentation	Date Complete	Comments
	<ul style="list-style-type: none"> ✓ Detailed timeline and criteria for recruiting, interviewing, selection, conducting background checks, and signing a contract for the head administrator by May 15. 	11.20.24	MAB - complete
	<ul style="list-style-type: none"> ✓ Develop a Head Administrator(s) evaluation process with timeline, responsible parties, forms and outcomes (evidenced in annual calendar) 	11.20.24	KL- Task complete- Encouraged to provide evaluation form Include for quick access
11-15.5 Detailed Staffing Plan. 6.29.1.9 NMAC	<ul style="list-style-type: none"> ✓ List of all prospective staff positions and licensure requirements for each. 	11.20.24	KL- Task complete
11-15.6 Enrollment processes and policies that comply with state and federal requirements. NMSA § 22-8B-4.1 ; 6.80.4.12 NMAC ;	<ul style="list-style-type: none"> ✓ Detailed and separate lottery and enrollment policies that comply with state guidance. CSD Lottery FAQ 	11.20.24	KL- Lottery & enrollment policies complete KL- 11.20.24 Lottery & enrollment forms are not provided. Include these to complete this section Child of staff member? yes or no. Is there a sibling enrolling in the school? yes or no? If so, name and grade processes complete Advertising methods and recruitment are complete
	<ul style="list-style-type: none"> ✓ All necessary forms that will be used for lottery admissions and enrollment processes. 		
	<ul style="list-style-type: none"> ✓ Evidence that the school is advertising. Methods of advertisement to recruit diverse student populations. 		

Indicators	Documentation	Date Complete	Comments
11-15.7 State Accountability System Choice The school's choice of how the PEC will annually assess the school's academic success	<input checked="" type="checkbox"/> Option 1: School's overall performance on the state accountability system <input type="checkbox"/> Option 2: School's overall performance on the state accountability system <i>and</i> supplemental proficiency and growth data in both reading and math using PED-approved nationally and/or state-normed assessments	11.15.24	MAB - complete
Summary Report – Items Due by November 15			
The Equip Academy team provided all elements of the November checklist. Six items were returned for clarification and all concerns/suggestions were incorporated.			
11-15.7 Attend all planning year conferences to discuss issues, concerns, and findings identified in the Checklist.	<input checked="" type="checkbox"/> The school scheduled with CSD within 10 days or received the November 15 Summary Report. <input checked="" type="checkbox"/> Attended all Technical Assistance Training Sessions	12.5.24	Completed

Items Due by March 1

Indicators	Documentation	Date Complete	Comments
3-1.1. Resolve all findings with the Implementation Year Checklist.	<input checked="" type="checkbox"/> Revise policies and provide additional documentation to resolve all findings, issues, and concerns identified in the November 15 review or discussed during the November 15 conference.	2.13.25	MB/KL

Indicators	Documentation	Date Complete	Comments
3-1.2. Governing Board established and complying with PEC notification requirements	✓ Review the PEC Policy, and Charter School Governing Body Changes document. Provide notice regarding any changes to the Governing Body which have occurred since November 15 and status of all board members training, to date.	3.5.25	The school has not had to make any changes to their board yet.
3-1.3. Student Membership <i>NMSA § 22-8-12.1.</i>	✓ Student membership for the upcoming school year to the CSD. Indicate number of students by grade level. Membership numbers must detail evidence.	3.28.25	MB- Returned 3.10.25 no evidence provided This is supposed to be the number of students you currently have based on lottery applications or enrollment forms received.
3-1.4 Status report on the development and acquisition of facilities that meet E-Occupancy, NMCI requirements, and ownership/lease requirements. <i>NMSA § 22-8B-4.2</i>	<p>✓ Status report of all actions taken to acquire a facility or a letter of commitment for an appropriate facility.</p> <p>If the school has not identified an appropriate facility, provide a detailed action plan, with steps, responsible parties and timelines.</p> <p>If the school has identified such a facility, provide the following as evidenced by timely contact with PSFA:</p> <ol style="list-style-type: none"> 1) Expected date of E-Occupancy certificate or actual certificate. 2) Any construction items that must be completed before E-Occupancy can occur. 3) NMCI score or expected date to receive score. 4) PSFA approval or identify items that must be completed before approval can be secured. 	3.10.25	MB- Task complete

Indicators	Documentation	Date Complete	Comments
3-1.5 Financial Control.	✓ Fully integrated accounting system to record and report all financial transactions; meeting the requirements stipulated per 6.20.2 NMAC , the Public-School Code, Chapter 22, NMSA, 1978 Compilation and Generally Accepted Accounting Principles (GAAP), and federal laws and regulations.	3.27.25	MB - School submitted their internal control procedures. K12 Aptafund
	✓ Internal control procedures 6.20.2.11 – 6.20.2.18 NMAC	5.19.25	MB - 3.10.25 Returned. need more information on the monitoring activities (how the board will monitor: the finance committee will provide monitoring annually and monthly). MB - 4.24.25 returned. Same reason as above. Provided more detailed guidance MB- task is complete.
	✓ Identify the Chief Procurement Officer. NMSA § 13.1-95.2	3.10.25	MB- Task complete
	✓ Procurement procedures consistent with state and federal law and regulations. NMAC § 6.20.2.17 ; 34 CFR 74.44 .	3.18.25	MB - Task completed
3-1.6 Mandatory operational policies and procedures have been developed.	✓ Attendance policies and procedures that meet the requirements of the Attendance for Success Act to include progressive and tiered interventions and communication methods with parent(s). NMSA § 22-12A-6 et seq.	3.27.25	KL- 3-5 Complete Recommendation: Tiered interventions should be tailored to your unique school model and program
	✓ Tobacco, alcohol, and drug-free policies and procedures. 6.12.4 NMAC	3.17.25	MB task complete

Indicators	Documentation	Date Complete	Comments
	✓ Medical cannabis policies and procedures. 6.12.10 NMAC	3.10.25	MB- Task complete
	✓ Bullying prevention policies and procedures. 6.12.7.8-10 NMAC	3.5.25	KL- Task Complete March 5 Recommendation: This should be tailored to your unique school model and program
	✓ Dual credit policies and procedures (high schools). 6.30.7.8 NMAC	N/A	KL- Task complete- K-5 does not offer
	✓ Distance and hybrid learning policies and procedures. 6.30.8 NMAC	3.5.25	KL- Task Complete March 5
	✓ Grade change policies and procedures. 6.30.10 NMAC	3.10.25	KL- Task complete 3/10
	✓ Policies, procedures, and any forms for ensuring parental access to information regarding professional qualifications of teachers, instructional support providers, and principals. NMSA § 22-10A-16.	3.7.25	MB task complete
	✓ Student information system security policies and procedures. 6.19.5.8 NMAC	3.7.25	MB task complete Power School
	✓ Staff discipline policies and procedures. 6.69.2.8 NMAC	3.10.25	KL-Task complete 3/10
	✓ Policy, process, or plan to disseminate <i>Code of Ethics and Standards of Professional Conduct</i> to all	3.5.25	KL- Task complete March 5

Indicators	Documentation	Date Complete	Comments
	licensed employees. 6.60.9.8 , 6.60.9.9 NMAC		
	✓ Policies and procedures for detention, suspension, or expulsion. 6.11.2.12 NMAC	3.5.25	KL- Task Complete March 5
	✓ Student discipline policies and procedures. 6.11.2.1 NMAC , <i>et seq.</i>	3.27.25	KL- Returned 3/10:Revise to include behavior intervention and tiered system for student behavior. Your policy should be unique to your school model and how students are supported behaviorally. KL- Task complete 3.27.25- Wonderful job!
	✓ Student and/or Parent Handbook.	3.11.25	MB task complete
	✓ Staff Handbook.	3.10.25	KL- Task complete 3/10
3-1.7 Curriculum plan. 6.29.1.9 NMAC	✓ Status report on implementation of Special Population Development Plans. ✓ Status report on implementation of curriculum development plan.	3.5.25	KL- Task complete 3/10
3-1.8 MLSS and SAT <i>NMAC § 6.29.1.9;</i> State Guidance .	✓ Multi-Layered System of Supports (MLSS) & Student Assistance Team (SAT) policies, procedures	3.10.25	KL- Task complete 3/10
3-1.9. Serving Special Populations IDEA 2004; 29 U.S.C. § 701 (Section 504 of the Rehabilitation Act of 1973)	✓ Evidence the school has consulted with the Language and Culture Division to develop procedures for identifying and serving ELs.	3.6.25	KL-Completed 3/6 Recommend include more details explaining outcomes of consultation as it relates to the school and how it will inform procedures with these subgroups

Indicators	Documentation	Date Complete	Comments
<p>NMSA § 22-13-5 to 22-13-8; 6.29.1.9; 6.29.5.1, et seq.; 6.31.2, et seq.; ; and 6.10.3.9(D) NMAC</p> <p>Homeless Guidance, NM Educational Stability Guidelines</p>	<p>✓ Plan to identify and serve English Learners, including forms and letters to parents.</p>	3.10.25	KL-Complete 3/10 Recommended to include more details explaining outcomes of consultation as it relates to the school and how it will inform procedures with these subgroups
	<p>✓ Evidence the school has consulted with the Special Education Division to review plan for IDEA and 504 requirements.</p>	2.3.25	MB- OSE met with the schools during our February IY Training
	<p>✓ Homeless education and assistance policies and procedures, to include the McKinney Vento Dispute Resolution. Homeless youth compliant policy and Notice of Educational Rights.</p> <p>Title IX, Part A of ESSA; PED Guidance</p>	3.27.25	KL-3/10 returned Revise to include: More details specific to Liaison roles and responsibilities and specific supports to families and students identified. KL- Task complete 3/27
3-1.10 Governing Board Annual Calendar	<p>✓ Status update on the Governing Board’s annual calendar.</p>	3.1.25	MB- School did not need to make any changes to their November submission
3-1.11 Family Engagement	<p>✓ Family Engagement Plan.</p>	3.27.25	KL- 3/10 Returned: Revise to include more specifics on your unique school model and how you intend to include and leverage families KL- Task complete 3/27
Summary Report – Items Due by March 1			
<p>The Equip Academy team provided all elements of the March checklist. Seven items were returned for clarification and all concerns/suggestions were incorporated. STILL WAITING ON INTERNAL CONTROL MONITORING</p>			

Indicators	Documentation	Date Complete	Comments
Attend all implementation year conferences to discuss issues, concerns, and findings identified in the Checklist.	<ul style="list-style-type: none"> ✓ School scheduled a conference with CSD within 10 days of receiving the March 1 Summary Report. ✓ Attended all Technical Assistance Training Sessions 	3.27.25	MB/KL

Items due by May 15

Indicators	Documentation	Date Complete	Comments
5-15.1. Resolve all findings with the Implementation Year Checklist.	✓ Revised policies and additional documentation to resolve all findings, issues, and concerns identified in the March 1 review or discussed during the March 1 conference.	5.19.25	MB/KL
5-15.2. Head Administrator <i>NMSA § 22-10A-3; 22-8B-10.</i>	✓ Administrative license or plan for obtaining licensure within 90 days of contract effective date.	5.15.25	MB Task in progress. Mercy Herrera is currently enrolled in the ALD program through CES
	✓ Signed contract with position description.	5.15.25	MB
5-15.3. Membership Projections & Enrollment. <i>NMSA § 22-8-12.1.</i>	✓ Evidence of current enrollment by grade level and as a percentage of the March 1 projected enrollment. (If insufficient evidence is provided, the School Budget Bureau may adjust the projected enrollment and determine SEG funding accordingly.)	5.15.25	MB The school is 52% enrolled as per their March projection
5-15.4. First Year Operating Budget in place. <i>NMSA § 22-8-11.</i>	✓ A Charter School Operating Budget and 901BCS-10 signed form that aligns with current enrollment and that has been submitted to the CSD.	5.15.25	MB – completed
5-15.5. Access to OBMS.	✓ OBMS User Form submitted to School Budget Bureau. 6.20.2.10 NMAC	5.27.25	MB will upload

Indicators	Documentation	Date Complete	Comments
5-15.6. Electronic system for management of financial data meets all requirements NMAC 6.20.2 , the Public-School Code, Chapter 22, NMSA 1978 Compilation, and Generally Accepted Accounting Principles (GAAP) and federal laws and regulations.	✓ Name of software the school plans on using and name of entity that publishes, manages, or operates the software.	5.15.25	MB School is using K12 Accounting and they use Aptafund
	✓ Evidence software includes encumbrance tracking. 6.20.2.9 (F) NMAC	5.15.25	MB Aptafund includes encumbrance tracking. It integrates encumbrance monitoring with its budgeting and purchasing modules.
5-15.7. Electronic system for management of student data	✓ Name of software the school plans on using and name of entity that publishes, manages, or operates the software.	5.15.25	MB PowerSchool
	✓ Evidence software is compatible with NOVA.	5.15.25	MB PowerSchool is compatible with NOVA
5-15.8. Assessment Plan Developed. NMAC § 6.80.4.9 .	✓ If the school provides interim assessments, evidence that they have been identified and budgeted, and that there has been contact with an assessment vendor.	6.16.25	KL- I do not see this in the Assessment plan that was submitted Should include assessment vendor and budget have been identified 5.19.25.

Indicators	Documentation	Date Complete	Comments
			KL- 6.12.25 Assessment plan still does include budget for assessment and communication with vendor KL- 6.16.25 Task complete
	✓ Provide plan and schedule for administration of interim assessment(s) and for administration of all state-mandated assessments, or any other planned assessments. 2024-25 Assessment & Accountability Memo	5.19.25	KL- Task complete 5.19.25
5-15.9. Staffing Plan.	✓ Status report on recruitment and hiring to meet staffing plan provided in application.	5.19.25	KL- task complete 5.19.25
	✓ Timelines to secure licensing and backgrounds for each prospective staff member.	6.12.25	KL- I do not see this mentioned in the plan provided 5.19.25 KL- Task complete 6.12.25
	✓ Special education staffing plan / contracts.	5.19.25	KL- I see SPED staffing plan but no contracts 5.19.25
5-15.10. Professional development plan.	✓ Plan and forms to implement professional development plans (PDPs) for individual teachers.	5.19.25	KL- Task complete 5.19.25
	✓ Evidence the school has communicated with the Educator Growth and Development Bureau for required PDP management systems. 6.60.10 ; 6.65.2.8 ; 6.30.5.13 ;	5.21.25	MB- The evidence was emailed as there was no location in Epicenter

Indicators	Documentation	Date Complete	Comments
5-15.11. Employee benefits and Risk Insurance coverage through the New Mexico Public Schools Insurance Authority (NMPSIA). <i>NMSA § 22-8B-9;</i> <i>NMAC § 6.50.1 et. seq;</i> <i>Charter Contract</i>	✓ Employee benefits coverage (may include basic life and accidental death & dismemberment, voluntary life, long-term disability, two medical plans, a dental plan with basic and comprehensive coverage, and a vision plan).	5.15.25	MB Task Complete
	✓ Risk coverage policy (may include property insurance, liability insurance, workers' compensation, student catastrophic insurance, student accident insurance, boiler & machinery insurance, and underground storage tanks coverage).	5.15.25	MB Task Complete
5-15.12. Health, Safety, and Wellness Policy Requirements <i>NMSA § 30-7-2.1; 32A-2-33</i> <i>6.29.1.9(O)(6); 6.12.1, et seq.</i> <i>NMAC</i> <i>Wellness Policy Guidance Document;</i>	✓ Health services policies and procedures. 6.12.2 NMAC ; <i>Health Education Guidance Document</i> .	5.19.25	KL- Task complete 5.19.25
	✓ Wellness policies and procedures pursuant to 6.12.2 NMAC submitted to the Student Success and Wellness Bureau for review. 6.12.6 NMAC	5.19.25	KL- Task complete 5.19.25
	✓ Safe Schools Plan pursuant to 6.12.6 NMAC submitted to the Safe and Healthy Schools Bureau for review. 6.12.6 NMAC ; Safe Schools Guidance .	5.15.25	MB- Task complete

Indicators	Documentation	Date Complete	Comments
Health Education Guidance Document; Homeless Policy Guidance Document; Charter Contract	✓ Plan for implementation of required emergency drills, including dates and types of drills for the school year. NMSA §22-13-14	5.19.25	KL- Task complete
	✓ Gun Free Schools policy. NMSA § 30-7-2.1; 32A-2-33.	5.19.25	KL- Task Complete 5.19.25
	✓ Health and wellness curriculum, scope and sequence that aligns to the NM content standards for all grades served. 6.29.6.1 et. seq. NMAC	5.19.25	KL- Task complete 5.19
	✓ Physical education curriculum, scope and sequence, that aligns to the NM content standards for the grades served. 6.29.9.1 et. seq. NMAC	5.19.25	KL- Task complete 5.19.25 ** Wish this plan was more robust and descriptive, not much scope and sequence provided.
	✓ Immunizations policies and procedures. 6.12.2.8 NMAC	5.15.25	MB Task Complete
	✓ Pest control policies & procedures. 6.29.1.9(P) (6) NMAC	5.15.25	MB Task Completed
5-15.13. Serving Special Populations IDEA 2004; 29 U.S.C. § 701 (Section 504,	✓ Special education & 504 policies and procedures.	5.19.25	KL- Task complete
	✓ Completed special education policies. 34 C.F.R. § 300.201	6.16.25	KL- I don't see a place for the school to submit this item MB- Epicenter created spot on 5.20.25 KL- Task complete 6.16.25

Indicators	Documentation	Date Complete	Comments
<i>Rehabilitation Act of 1973</i>); <i>NMSA § 22-13-5; 22-13-8; 6.29.1.9; 6.29.5.1, et seq.; 6.31.2, et seq. NMAC</i>	<input checked="" type="checkbox"/> Procedures and all necessary forms for tracking special education direct student services.	6.16.25	KL- I don't see a place for the school to submit this item MB- Epicenter created spot on 5.20.25 KL- Task complete
	<input checked="" type="checkbox"/> English Learner policies and procedures that align with federal and state guidance.	5.19.25	KL- Task complete 5.19.25
	<input checked="" type="checkbox"/> All forms and surveys for implementation of EL policies and procedures.	6.16.25	KL- I don't see a place for the school to submit this item MB- Epicenter created spot on 5.20.25 MB - accepted form in Epicenter on 6.16.25
5-15.14. Directed Program Time Requirements.	<input checked="" type="checkbox"/> Schedule, calendar, and any other necessary documentation that ensures minimum directed program time and adequate instructional time for grades served. NMSA § 22-8-9 ; 22-2-8.1 ; 6.29.1.9(J) NMAC ; <i>Instructional Hours Worksheet</i> .	5.19.25	KL- Task complete 5.19.25 ***Very difficult to read and understand
5-15.15. High school and middle school requirements. (This indicator is applicable only to schools that serve grades 6-12.) <i>Charter Contract</i>	<input type="checkbox"/> Graduation requirements (schools that serve grade 12). NMSA § 22-13-1.1		KL- N/A School serves K-5
	<input type="checkbox"/> Next Step Plan forms, policies and procedures (schools that serve grades 8-12). NMSA § 22-13-1.1		KL-N/A School serves K-5
	<input type="checkbox"/> School Athletic Equity policies and procedures (schools that serve grades 7-12). 6.13.4 NMAC		KL- N/A School serves K-5

Indicators	Documentation	Date Complete	Comments
	<input type="checkbox"/> Evidence the school offers at least one honors or similar academically rigorous class each in mathematics and language arts (schools that serve grades 9-12). NMSA § 22-13-1.4.		KL- N/A School serves K-5
	<input type="checkbox"/> Evidence the school has a signed Dual Credit Master Agreement with an institution of higher education (schools that serve grades 9-12). NMSA § 22-13-1.4.		KL- N/A School serves K-5
	<input type="checkbox"/> Evidence the school has a program of distance learning courses in place (schools that serve grades 9-12). NMSA § 22-13-1.4.		KL- N/A School serves K-5
	<input type="checkbox"/> Evidence the school is prepared to offer at least two years of a language other than English (schools that serve grades 9-12). NMSA § 22-13-1.4.		KL- N/A School serves K-5
5-15.16 Budget Approval 6.20.2.9 NMAC	<input checked="" type="checkbox"/> Governing Body meeting date to review and approve the school budget at an open meeting (school budget due dates will vary by school and are set by school budget division at PED).	5.15.25	MB task completed The budget approval is a scheduled agenda item for our June 12, 2025 board meeting
Summary Report – Items Due by May 15			
Equip did not submit all of the required elements of the May checklist on time. The school has successfully responded to all of the requirements of the Implementation Year Checklist as of June 26, 2025.			

Indicators	Documentation	Date Complete	Comments
Attend all implementation year conferences to discuss issues, concerns, and findings identified in the Checklist.	<ul style="list-style-type: none"> ✓ School scheduled a conference with CSD within 10 days of receiving the May 15 Summary Report. ✓ Attended all Technical Assistance Training Sessions. 	5.27.25	
	<ul style="list-style-type: none"> ✓ All draft policies and procedures with concerns have been addressed and approved by the board. 	6.16.25	

School-Specific Conditions from PEC Motion

Condition	Documentation	Date Complete	Comments
Equip Academy is approved on the condition that the school is housed in a location on the westside of Albuquerque.		3.13.25	<p>Once the applicant has provided an E-Occupancy showing that the school will be located on the westside of Albuquerque, the condition shall be deemed to be met, and the westside school location will be incorporated into your charter contract.</p> <p>3.13.25 at contract negotiations the PEC subcommittee refined the location requirements to say that The School will provide in-person instruction at a facility located within the Albuquerque Public School District west of Interstate 25. The school will provide the information on the location to the PEC prior to commencing operations.</p> <p>5.15.25 E-occupancy is scheduled for 5.12.25</p>
Summary Report - Conditions			
The PEC agreed to let the school widen their target area for their facility and the school secured a suitable location on the east side of the Rio Grande River.			

Commencement of Operations Checklist: PEC Meeting

Indicators	Documentation	Date Complete	Comments
C.1. Board of Finance.	<p>✓ Obtain standing as an approved Board of Finance no more than 90 days from the date of the vote for approval of the new application.</p> <p>NMSA § 22-8-38[B]; 6.80.4.16[A] NMAC; PEC Policy</p>		This was completed in the Fall of 2024
C.2. Facilities.	<p><input type="checkbox"/> Assurances to demonstrate the lease, lease purchase, or ownership arrangement complies with NMSA § 22-8B-4.2.</p> <p><input type="checkbox"/> If applicable, evidence school has timely submitted all required application materials to PSFA for lease reimbursement payments by its deadlines.</p>		
C.3. Contract and framework negotiation and approval process.	<p>✓ PEC approval of any substantial changes to the educational model, staffing, organizational, and governance plan, or finance plan that were presented in the application.</p>		There were no changes
C.4. Nepotism and conflict of interest policy	<p><input type="checkbox"/> Signed Conflict of Interest statement from the Head Administrator.</p>		
NMSA § 22-5-6 ; 22-8B-5.2	<p><input type="checkbox"/> Evidence the Governing Board and Foundation (if any) are in compliance.</p>		

Items Due Two Weeks Prior to Opening

If the school fails to meet any of the following indicators, the CSD will inform the PEC. At that time, the PEC will take appropriate action.

Indicators	Documentation	Date Complete	Comments
P-O.1. Resolve all findings in the Checklist.	<input type="checkbox"/> Revised policies and additional documentation to address and resolve all findings, issues, and concerns identified in the May 15 review or discussed during the May 15 conference.		
P-O.2. Curriculum framework is articulated in writing and matches school mission and goals. (Framework aligned to NM content standards, benchmarks and performance standards by end of first year.)	<input type="checkbox"/> Resources necessary for the implementation of the curriculum as articulated are available.		
	<input type="checkbox"/> Curriculum identifies resources, knowledge and skills students are expected to learn (NMCCSS/NMCS).		
	<input type="checkbox"/> Curriculum identifies the learning standards or learning objectives students are expected to meet for each course.		
	<input type="checkbox"/> Curriculum identifies the units and lessons that teachers will teach.		
	<input type="checkbox"/> Curriculum identifies example assignments and projects that will be given to students.		
	<input type="checkbox"/> Curriculum identifies example books, materials, videos, presentations, and readings used in a course.		
	<input type="checkbox"/> Curriculum identifies example tests, assessments, and other methods used to evaluate student learning		

Indicators	Documentation	Date Complete	Comments
P-O.3. School has implemented and adopted a budget and all mandatory policies.	<input type="checkbox"/> Signed statement from the governing body that the final budget, the final operating budget, and any revised policies were adopted and implemented.		
	<input type="checkbox"/> If the school is at less than 95% of budgeted enrollment, a plan to adjust budget.		
P-O.4. Facilities <i>NMSA § 22-8B-4.2</i>	<input type="checkbox"/> E-Occupancy certificate.		
	<input checked="" type="checkbox"/> PSFA letter certifying NMCI requirements	5.15.25	
	<input type="checkbox"/> Lease. If with a private lessor or foundation, assurances that the lease meets maintenance requirements.		
P-O.5. Recruitment and hiring of adequate number of teachers and support personnel to match assignments and staffing plan, as adapted for actual enrollment	<input type="checkbox"/> Licenses and credentials in staff files or a plan for obtaining required licensure within 90 days.		
	<input type="checkbox"/> School has necessary licensure to teach identified classes and grade levels or a plan for obtaining required licensure within 90 days.		
	<input type="checkbox"/> Signed contract(s) supporting minimum salaries and detailed position descriptions in each staff file.		
	<input type="checkbox"/> Criminal background checks and fingerprinting documentation in each staff file.		
	<input type="checkbox"/> Evidence that licensed school employees are in compliance with nepotism and conflict of interest policies.		
	<input type="checkbox"/> Evidence of a licensed special education provider and a licensed gifted provider either on staff or on contract. If school has no identified special education or gifted		

Indicators	Documentation	Date Complete	Comments
	students, evidence of a plan to provide these services if needed.		
	<input type="checkbox"/> Evidence of a licensed diagnostician available for special education evaluation referrals.		
P-O.6. Relevant and necessary student forms completed and on file.	<input type="checkbox"/> Completed student enrollment forms. Forms must indicate there is enrollment for a minimum of 8 students with New Mexico Residency.		
	<input type="checkbox"/> Completed Language Usage Survey for any students new to the NM Public School system.		
	<input type="checkbox"/> IEPs for all identified students or evidence that an IEP meeting has been requested.		
Summary Report – Items Due Two Weeks Prior To Opening Date			