

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**

Sun Mountain Community School

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

Zoe Wilcox, Jonathan Davis 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. There were five items from the November checklist that were not completed until after the March deadline. This occurred again with three items 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
8	None	None

Part IV. 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 - this task is complete and all documents are in the R drive

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- Complete
	<p>✓ Evidence each Board member has completed the 10-hour New Member Course.</p> <p>NMSA §22-8B-5.1</p>	9.9.24	MAB- Complete
	<p>✓ Bylaws</p> <p>include provision for creating-audit and finance committees.</p>	12.27.24	MAB - 12.27.204 completed MAB - 12.17.24 returned in Epicenter MAB - 11.20.24

Indicators	Documentation	Date Complete	Comments
<i>Charter Contract</i>	include provision for replacing and removing members NMSA § 22-8-12.3		7.0 Resignation - how does the chair resign? 12.6.4 - consider including the responsibility of posting the meeting recordings as well. 13.1.4 - by statute the Audit committee must have 6 members.
	✓ 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	11.18.24	MAB - Completed
	✓ Evidence the Governing Board has drafted an annual calendar of meetings, key Governing Board tasks, and reporting requirements.	4.11.25	MAB - 12.17.24 returned in Epicenter MAB- 11.18.24 needs revision
	✓ Transparent, annual process for selecting and appointing Equity Council members that reflect student demographics. PED guidance	3.18.25	MAB - 12.17.24 returned in Epicenter MAB - The Equity Council must be a reflection of the school's population. A consortium would not meet this criteria. You are on the right track with the % listed but you won't know your school's % until you have enrolled students. Also, there needs to be a way annually to ensure the EC reflects the current school %'s. This document should include a description of what the transparent process is going to be. Will you post openings, do direct outreach to desired groups?

Indicators	Documentation	Date Complete	Comments
	✓ How the board will ensure that the Equity Council will fulfill their role as advisors ensuring equity including completing readiness assessments, advisement, strategic planning, and CLR inventory and framework responsibilities.	11.18.24	MAB - The month that the board expects to receive the reports mentioned from the Equity Council would be good to add to your Annual Board Calendar.
	✓ 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 NMSA § 22-8B-5.5 ; NMSA § 10-15-1 F-G , et seq.	11.18.24	MAB - Complete
	✓ Annual Open Meetings Act Resolution as well as plan to update annually NMSA § 10-15-1 (D)	3.18.25	MAB - 12.17.24 returned in Epicenter MAB - 11.18.24 We are missing the plan to update annually. This would be good to put on your board's annual calendar. MAB - 3.18.25 the board still needs to determine their intended meeting date and time
	✓ IPRA policy and procedures that comply with state law. NMSA § 14-2-1 , et seq.	11.18.24	MAB - complete
	✓ Name of the foundation, name of the principal officers, and their contact information. PEC Policy	11.18.24	MAB- No Foundation at this time. Please note that if you do decide to have a foundation, you will need to submit the required Amendment Request to do so.

Indicators	Documentation	Date Complete	Comments
	✓ Conflict of interest policy and procedures, for the Governing Board and school personnel NMSA § 22-8B-5.2.	11.18.24	MAB- I recommend considering in section III.3 if the board does waive the nepotism clause, will the Head of school be the direct supervisor of their family member?
	✓ Anti-nepotism policy and procedures. NMSA § 22-8B-10.	11.18.24	MAB - see note above
	✓ Background check policy and procedures. NMSA § 22-10A-5.	12.17.24	MAB - 12.17.24 returned in Epicenter MAB - 11.18.24 Please know that the school is required to pay for all fingerprinting costs. This can be done as a reimbursement. You can require a contractor to pay for their employee's fingerprinting.
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 - School is creating an MOU with the former Waldorf school to use their ORI #
	✓ 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. I suggest that you consider that appeals come to a subcommittee of the board first. You should also include a process for if the complaint is about the head of school. This is why a subcommittee would be very helpful as they can attempt to come to a resolution without having to have an open meeting. Also, I have developed a tracker that you might consider. Consider that a

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			complainant might rescind their complaint (in writing) and or accepts the resolution.
	<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 	11.25.24	MAB- 11.20.24 incomplete school has indicated that they are working on the UEI
	<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). 	5.19.25	<p>MAB - 12.17.24 returned in Epicenter</p> <p>KL- 11.20.24</p> <p>Section Needs Revision No mention of Benchmarks or responsible parties. School needs a descriptive plan for how they will ensure curriculum is aligned to mission, goals and content standards, leveraging the equity council. School should include a plan for structure for the equity council to ensure curriculum is developed with subgroups in mind, and mission specific goals and educational model</p>

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			<p>are aligned. School should include a scope and sequence for education program that includes NM Content standards</p> <p>KL 5.6.25- Returned:</p> <p>Thank you for adding to this plan providing a timeline and responsible parties. I see that in your plan mentions "Content Standards Breakdown (Grades k-8)-- Break down the New Mexico Common Core State Standards (ELA and Math), New Mexico State Standards (Social Studies), and the New Mexico Next Generation Science Standards (Science) into measurable learning objectives, as well as determine which ELA and Math standards are taught in each of the courses (i.e. ELA and Textual Analysis, Foundational Math and Conceptual Math)". This was to be completed by March 2025. I do not see NMSS linked into your plan, please connect those where appropriate.</p> <p>Another concern: I only see Math and Language Arts core content areas mentioned in the 2nd grade scope and sequence. We should see all content areas presented in the scope and sequence. Please also include the other core content areas (Social Students and Science). Adding to this plan will help me identify your vision for NMSS in a Waldorf Inspired school. Feel free to reach out to me, and we can hop on a zoom if you need more guidance on this.</p>

Indicators	Documentation	Date Complete	Comments
			KL- Task complete 5.19.25
	<p>✓ Special population services development plan, to ensure development of plans, policies, and procedures to serve special education, ELL, and 504 Plans.</p>	4.16.25	<p>MAB - 12.17.24 returned in Epicenter</p> <p>KL- 11.20.24</p> <p>Very detailed and descriptive plan. A lot of information on how to implement services and processes, which is helpful, but difficult to navigate, because it's so vast.</p> <p>Section Needs Revision- School needs to include a table with Roles, responsibilities, dates and actions for each subgroup and how often it will happen/take place. *Exemplar Equip</p> <p>KL- Task complete- Looks great!</p>
	<p>✓ 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.</p> <p>NMSA § 22-23A, 6.35.2 NMAC</p>	11.7.24	MAB - this task is complete
<p>11-15.4 Development Plans.</p> <p>6.29.1.9B(8) NMAC</p>	<p>✓ 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</p> <p>NMSA § 22-23B</p>	11.7.24	MAB - this task is complete

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	<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 - consultation has occurred
	<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. 	11.20.24	MAB - complete
	<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 is complete
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 is complete
11-15.6 Enrollment processes and policies	<ul style="list-style-type: none"> ✓ Detailed and separate lottery and enrollment policies that comply with state guidance. 	3.18.25	KL- 11.202.24 -Detailed lottery and enrollment in compliance.

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that comply with state and federal requirements. <i>NMSA § 22-8B-4.1; 6.80.4.12 NMAC;</i>	CSD Lottery FAQ ✓ All necessary forms that will be used for lottery admissions and enrollment processes. ✓ Evidence that the school is advertising. Methods of advertisement to recruit diverse student populations.		11.20.24 Was not able to access Google Form *Lottery Application- Form provided called “Enrollment Form” - Not sure if this is the Lottery form. Encouraged to take off street address from lottery form. Recruitment efforts identified- encouraged to add language as a part of the recruitment efforts, so that EL families are not excluded from student populations recruited.
11-15.7 State Accountability System Choice The school’s choice of how the PEC will annually assess the school’s academic success	✓ Option 1: School’s overall performance on the state accountability system 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 - iStation MAB - As of 5.19.25 the school is no longer option 2. They will be option1
Summary Report – Items Due by November 15			
The Sun Mountain Community School team provided all elements of the November checklist. Nine items were returned for clarification. Three items are still outstanding as of March 27, 2024			
11-15.7 Attend all planning year conferences to discuss issues, concerns, and findings identified in the Checklist.	✓ The school scheduled with CSD within 10 days or received the November 15 Summary Report. ✓ Attended all Technical Assistance Training Sessions	12.17.24	Completed

Items Due by March 1

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3-1.1. Resolve all findings with the Implementation Year Checklist.	✔ 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.	5.15.25	MB/KL Meeting 3.26.2025 3.28.25 We are still waiting on the Board’s Annual Calendar, The Curriculum development plan and the Special Populations plan																																																																																																																																																																																																																																																																																																																									
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 successfully completed a board member change notification																																																																																																																																																																																																																																																																																																																									
3-1.3. Student Membership NMSA § 22-8-12.1 .	✔ Student membership for the upcoming school year to the CSD. Indicate number of students by grade level. Membership numbers must detail evidence.	3.6.25	MB School has provided a list of their prospective students. They have 119 prospective students who made it in their lottery <table><tr><th colspan="6">ACCEPTED</th></tr><tr><th>No.</th><th>Kindergarten</th><th>1st Grade</th><th>2nd Grade</th><th>3rd Grade</th><th>4th Grade</th><th>5th Grade</th></tr><tr><td>1</td><td>Vega Ziegler</td><td>William Marand</td><td>Georgia Fader</td><td>Ayesha Wardland</td><td>Pear Lucidike</td><td>Aspen Wardland</td></tr><tr><td>2</td><td>Patricia Lucidike</td><td>Karen Oda</td><td>Jessica Cullen</td><td>Kenneth Ziegler</td><td>Dante Hoffman</td><td>Kortan Hoffman</td></tr><tr><td>3</td><td>Garcenia</td><td>Arthur Lucidike</td><td>Sylvia (Yurika) Jensen</td><td>Alexander Scott</td><td>Egonne Scott</td><td>Egonne Scott</td></tr><tr><td>4</td><td>Zain Castro</td><td>Melody Mawronce</td><td>Rory Stewart</td><td>Frances Fader</td><td>Stella Jensen</td><td>Stella Fochney</td></tr><tr><td>5</td><td>Jay Wheeler</td><td>Ado Boppe</td><td>Archer Backer</td><td>George Marand</td><td>Melody Rubio</td><td>Yag Marand</td></tr><tr><td>6</td><td>Arndt Morris</td><td>Bertor Muller</td><td>Lemon Lorene</td><td>Azmer Mayi</td><td>Taylor Buschorn</td><td>Maru Oda</td></tr><tr><td>7</td><td>August Morris</td><td>Marion Wheeler</td><td>Marion Wheeler</td><td>Rachel Cullen</td><td>Prize Buschorn</td><td>Yanika Cruz-Castillo</td></tr><tr><td>8</td><td>Imena Soria</td><td>Rumi Blag</td><td>Kajoo Rivera</td><td>James Lucidike</td><td>Kelma Lorene</td><td>Zachary Kipping</td></tr><tr><td>9</td><td>Daniela Valencia</td><td>Mirna Weller</td><td>Theresa Morris</td><td>Beth Cullen</td><td>Jonas Parker</td><td>Mesa Herman</td></tr><tr><td>10</td><td>Pablo Yael Rodriguez Morales</td><td>Juliana Medson Hom</td><td>Eleanor Parker</td><td>Carlota Isaac</td><td>Isaac Corbin</td><td>Isaac Corbin</td></tr><tr><td>11</td><td>Noor Razaoui</td><td>Tommy Bright</td><td>Athens Greening</td><td>Oliver Marand</td><td>Asper Abrams</td><td>Tula Gild</td></tr><tr><td>12</td><td>Faye Boppe</td><td>Shepard Jensen</td><td>Spence Backer</td><td>Zachary Zandaram</td><td>Alissa Backer</td><td>Sabrina Williamson</td></tr><tr><td>13</td><td>Chelsea Kopp</td><td>Gabriella Vigil</td><td>Judith Kuller</td><td>Cy Simon</td><td>Rutyn Lee</td><td>Zulia Estess</td></tr><tr><td>14</td><td>Matthew Garner</td><td>Alexandra Vigil</td><td>Spence Gert</td><td>Liam Farnes</td><td>Andrew Hestey</td><td>Samuel Jensen</td></tr><tr><td>15</td><td>Isabella Zaghes Leone</td><td>Makena Abrams</td><td>Elena Hestey</td><td>Max Proser</td><td>Ira Blackwell</td><td>Eligh Gartner</td></tr><tr><td>16</td><td>Harro Muller</td><td>West Logel</td><td>Indie Blackwell</td><td>Diamond Murphy</td><td>Phyllis Hudson</td><td>Walden Murphy</td></tr><tr><td>17</td><td>Elodie Friedman</td><td>Cecilia Buschorn</td><td>Post Wallfuer</td><td>Sasha Trullis Buatta</td><td>Ther Hestey</td><td>Renee Rubin</td></tr><tr><td>18</td><td>Bernadette Cornejo</td><td>Athens Morales Pablos</td><td>Hadi McQuade</td><td>Oakley Glanberg</td><td>Charles Bishop</td><td>Chen Dry</td></tr><tr><td>19</td><td></td><td></td><td>Ru. 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7	August Morris	Marion Wheeler	Marion Wheeler	Rachel Cullen	Prize Buschorn	Yanika Cruz-Castillo																																																																																																																																																																																																																																																																																																																						
8	Imena Soria	Rumi Blag	Kajoo Rivera	James Lucidike	Kelma Lorene	Zachary Kipping																																																																																																																																																																																																																																																																																																																						
9	Daniela Valencia	Mirna Weller	Theresa Morris	Beth Cullen	Jonas Parker	Mesa Herman																																																																																																																																																																																																																																																																																																																						
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13	Chelsea Kopp	Gabriella Vigil	Judith Kuller	Cy Simon	Rutyn Lee	Zulia Estess																																																																																																																																																																																																																																																																																																																						
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6	Louis Mawronce	Kai Love				Rosita Montoya																																																																																																																																																																																																																																																																																																																						
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13	Henry Murray	Harvey Monson				Mia Anderson																																																																																																																																																																																																																																																																																																																						
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Indicators	Documentation	Date Complete	Comments
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. 	3.6.25	MB - school has provided their lease agreement
3-1.5 Financial Control.	<p>✓ 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.</p>	3.26.25	MB- returned 3.7.25. we need the name of the software program. AXIOM
	<p>✓ Internal control procedures</p> <p>6.20.2.11 – 6.20.2.18 NMAC</p>	5.19.25	<p>MB - 3.6.25 Returned to school asking for more detail on the action steps to be taken by the finance committee in the monitoring of internal controls</p> <p>MB- 4.17.25 returned to school. They need to describe how the Finance Committee will monitor</p>

Indicators	Documentation	Date Complete	Comments
			the various financial procedures outlined in their policy.
	✓ Identify the Chief Procurement Officer. NMSA § 13.1-95.2	3.7.25	MB- They are working on getting trained and certified
	✓ Procurement procedures consistent with state and federal law and regulations. NMAC § 6.20.2.17 ; 34 CFR 74.44 .	3.5.25	in section III.a.ii do you mean Purchases to be plural? Are you aware that the board has to approve purchases over 5K in section II.a.ii but not on items over 10K in III.v? There are highlighted sections that you may want to unhighlight: III.b.ii and iii and i
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.	4.14.25	KL- Returned 3-5- Revise to Include explanation of excused attendance for Tribal community traditions. Recommendation: This should be tailored to your unique school model and program KL- Task complete 4/14
	✓ Tobacco, alcohol, and drug-free policies and procedures. 6.12.4 NMAC	3.5.25	KL- task complete march 5
	✓ Medical cannabis policies and procedures. 6.12.10 NMAC	3.7.25	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

Indicators	Documentation	Date Complete	Comments
	✓ Dual credit policies and procedures (high schools). 6.30.7.8 NMAC	N/A	KL- Task complete March 5
	✓ 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	3.5.25	KL- Task complete March 5 Recommendation: This should be tailored to your unique school model and program
	✓ 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.	3.6.25	KL- Task complete 3/6 Encouraged to add/change School will provide language access for families that do not speak English.
	✓ Student information system security policies and procedures. 6.19.5.8 NMAC	6.16.25	KL- RETURNED 3.7.25 School is using PowerSchool but there were no Policy nor Procedures MB - completed 6.16.25
	✓ Staff discipline policies and procedures. 6.69.2.8 NMAC	3.6.25	KL- Task complete 3/6
	✓ Policy, process, or plan to disseminate <i>Code of Ethics</i> and <i>Standards of Professional Conduct</i> to all licensed employees. 6.60.9.8 , 6.60.9.9 NMAC	3.5.25	KL- Task Complete March 5
	✓ Policies and procedures for detention, suspension, or expulsion. 6.11.2.12 NMAC	3.5.25	KL- Task Complete March 5

Indicators	Documentation	Date Complete	Comments
			Recommendation: This should be tailored to your unique school model and program
	✓ Student discipline policies and procedures. 6.11.2.1 NMAC , et seq.	3.6.25	KL- Task complete 3/6 Recommendation: This should be tailored to your unique school model and program
	✓ Student and/or Parent Handbook.	3.6.25	KL- task complete 3/6
	✓ Staff Handbook.	3.6.25	KL- Task complete 3/6
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.	5.19.25	KL- Curriculum status report Task complete 3/6 KL- Special population- I don't see a submission 3/6 KL- Task complete 5.19.25
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	3.6.25	KL- Task complete 3/6 Encouraged to outline in bulleted form Tiered supports at the beginning for clarity and overall understanding.
3-1.9. Serving Special Populations IDEA 2004; 29 U.S.C. § 701 (Section 504 of the Rehabilitation Act of 1973) <i>NMSA § 22-13-5 to 22-13-8;</i> 6.29.1.9; 6.29.5.1, et seq.; 6.31.2, et seq.;	✓ Evidence the school has consulted with the Language and Culture Division to develop procedures for identifying and serving ELs.	3.6.25	KL- consider revising to include the school name on the document, with who from LCD you met with and on what date this happened.
	✓ Plan to identify and serve English Learners, including forms and letters to parents.	5.4.25	KL- Returned 3/6 revise to include forms and letters to families (in English & Spanish) KL- Returned 4/14 I still do not see forms and letters to families in the submission KL- Task Complete 5/4

Indicators	Documentation	Date Complete	Comments
and 6.10.3.9(D) NMAC Homeless Guidance , NM Educational Stability Guidelines	✓ Evidence the school has consulted with the Special Education Division to review plan for IDEA and 504 requirements.	2.3.25	MB- OSE met with the schools during our February IY Training
	✓ Homeless education and assistance policies and procedures, to include the McKinney Vento Dispute Resolution. Homeless youth compliant policy and Notice of Educational Rights. Title IX, Part A of ESSA ; PED Guidance	3.6.25	KL- Task complete 3/6
3-1.10 Governing Board Annual Calendar	✓ Status update on the Governing Board's annual calendar.	4.21.25	MB- returned Completed
3-1.11 Family Engagement	✓ Family Engagement Plan.	3.6.25	KL- Task complete Wonder: Is part of the family engagement the equity council? This should comprise all stakeholder groups as they relate to the subgroups in the Y/M lawsuit, not just parents. Recommendation: This should be tailored to your unique school model and program
Summary Report – Items Due by March 1			
The Sun Mountain Community School team provided all elements of the March checklist. Eight items were returned for clarification. Seven items from the March checklist and three items from the November checklist are still outstanding as of March 27, 2024			

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 	3.26.2025	

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.	6.16.25	MB/KL Still waiting on SIS security P&P 5.28.25 MAB: Completed 6.16.25
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
	✓ Signed contract with position description.	5.15.25	MB
5-15.3. Membership Projections & Enrollment. <i>NMSA § 22-8-12.1.</i>	<ul style="list-style-type: none"> ✓ Evidence of current enrollment by grade level and as a percentage of the March 1 projected enrollment. <p>(If insufficient evidence is provided, the School Budget Bureau may adjust the projected enrollment and determine SEG funding accordingly.)</p>	5.15.25	MB

Indicators	Documentation	Date Complete	Comments
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.	5.23.25	MB- Returned 5.19.25 It was just a signature page from the board stating they have approved the budget. MB- Completed
5-15.5. Access to OBMS.	✓ OBMS User Form submitted to School Budget Bureau. 6.20.2.10 NMAC	5.15.25	MB
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.	5.19.25	MB- They did not provide the name of the software. I have emailed Axiom Axiom says the software is Trequel
	✓ Evidence software includes encumbrance tracking. 6.20.2.9 (F) NMAC	5.19.25	MB The school is using Axiom who is well versed in the requirements
5-15.7.	✓ Name of software the school plans on using and name of entity that publishes, manages, or operates the software.	5.22.25	MB- 5.20.25 returned. The submission was regarding financial data management not student data management

Indicators	Documentation	Date Complete	Comments
Electronic system for management of student data			Completed
	✓ Evidence software is compatible with NOVA.	5.22.25	MB - PowerSchool
5-15.8. Assessment Plan Developed. <i>NMAC § 6.80.4.9.</i>	✓ If the school provides interim assessments, evidence that they have been identified and budgeted, and that there has been contact with an assessment vendor.	5.20.25	KL
	✓ 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	5.20.25	KL
5-15.9. Staffing Plan.	✓ Status report on recruitment and hiring to meet staffing plan provided in application.	5.20.25	KL
	✓ Timelines to secure licensing and backgrounds for each prospective staff member.	5.20.25	KL
	✓ Special education staffing plan / contracts.	5.20.25	KL
5-15.10. Professional development plan.	✓ Plan and forms to implement professional development plans (PDPs) for individual teachers.	5.20.25	KL
	✓ 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 ;	5.15.25	MB - 5.15.25 School has done research and has reached out to Educator Growth & Development but has not yet heard back. Evidence was emailed as Epicenter neglected to create an upload for the task

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).	6.13.25	MB Returned on 5.22.25 only submitted an email asking for evidence from NPSIA 5.23.25 - school is in process with NPSIA MB- Zoe has the doc
	✓ 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
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>	5.20.25	KL
	✓ Wellness policies and procedures pursuant to 6.12.2 NMAC submitted to the Student Success and Wellness Bureau for review. 6.12.6 NMAC	5.20.25	KL
	✓ 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.	5.19.25	MB

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	5.20.25	KL
	✓ Gun Free Schools policy. NMSA § 30-7-2.1; 32A-2-33.	5.20.25	KL
	✓ 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	5.20.25	KL
	✓ Physical education curriculum, scope and sequence, that aligns to the NM content standards for the grades served. 6.29.9.1 et. seq. NMAC	5.20.25	KL
	✓ Immunizations policies and procedures. 6.12.2.8 NMAC	5.15.25	MB
	✓ Pest control policies & procedures. 6.29.1.9(P) (6) NMAC	5.15.25	MB
5-15.13. Serving Special Populations IDEA 2004; 29 U.S.C. § 701 (Section 504, Rehabilitation Act of 1973);	✓ Special education & 504 policies and procedures.	5.20.25	KL
	✓ Completed special education policies. 34 C.F.R. § 300.201	5.20.25	KL
	✓ Procedures and all necessary forms for tracking special education direct student services.	6.16.25	KL- returned 5.20 this was not included in the plan MB - completed 6.16.25

Indicators	Documentation	Date Complete	Comments
<i>NMSA § 22-13-5; 22-13-8; 6.29.1.9; 6.29.5.1 <i>et seq.</i>; 6.31.2, <i>et seq.</i> NMAC</i>	<input checked="" type="checkbox"/> English Learner policies and procedures that align with federal and state guidance.	5.20.25	KL
	<input checked="" type="checkbox"/> All forms and surveys for implementation of EL policies and procedures.	5.27.25	KL- Returned 5.20 this is not included in the plan 5.27.25 Completed
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> .	5.27.25	KL- Returned 5.20.25: Please include a calendar and schedule for what the year and day will look like for students. 5.27.25 Completed
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	N/A	KL
	<input type="checkbox"/> Next Step Plan forms, policies and procedures (schools that serve grades 8-12). NMSA § 22-13-1.1	N/A	KL
	<input type="checkbox"/> School Athletic Equity policies and procedures (schools that serve grades 7-12). 6.13.4 NMAC	N/A	KL
	<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 .	N/A	KL

Indicators	Documentation	Date Complete	Comments
	<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.	N/A	KL
	<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.	N/A	KL
	<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.	N/A	KL
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
Summary Report – Items Due by May 15			
Attend all implementation year conferences to discuss issues, concerns, and findings identified in the Checklist.	<input checked="" type="checkbox"/> School scheduled a conference with CSD within 10 days of receiving the May 15 Summary Report. <input checked="" type="checkbox"/> Attended all Technical Assistance Training Sessions.	5.27.25	
	<input checked="" type="checkbox"/> All draft policies and procedures with concerns have been addressed and approved by the board.		

School-Specific Conditions from PEC Motion

Condition	Documentation	Date Complete	Comments
Sun Mountain Community School is approved on the conditions that the school provide a plan for outreach and possible options for transportation	https://drive.google.com/file/d/1-SDBsaN1p-dRo-WS6nqhlo2juHrvh_Qx/view?usp=drive_link	11.15.2024	Provide in the first submission of the Implementation Year Checklist. The outreach shall be targeted outside of the previous Waldorf community and show adequate outreach to the full Santa Fe community, including possible partners and tribal communities, to assist in outreach. A plan for adequate outreach and plan for transportation shall be incorporated in the charter contract.
Summary Report - Conditions			
Sun Mountain has provided a detailed plan with outreach and enrollment goals, strategies, timelines, responsible parties, guiding questions and evaluation. They have developed a multi-pronged strategy to reach out to Santa Fe area families who are unfamiliar with the Waldorf program using a variety of resources and methods.			

Commencement of Operations Checklist: PEC Meeting

Indicators	Documentation	Date Complete	Comments
C.1. Board of Finance.	<input checked="" type="checkbox"/> 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. NMSA § 22-8-38[B] ; 6.80.4.16[A] NMAC ; <i>PEC Policy</i>	10.18.24	
C.2. Facilities.	<input type="checkbox"/> Assurances to demonstrate the lease, lease purchase, or ownership arrangement complies with NMSA § 22-8B-4.2 .		

Indicators	Documentation	Date Complete	Comments
	<input type="checkbox"/> If applicable, evidence school has timely submitted all required application materials to PSFA for lease reimbursement payments by its deadlines.		
C.3. Contract and framework negotiation and approval process.	<input type="checkbox"/> PEC approval of any substantial changes to the educational model, staffing, organizational, and governance plan, or finance plan that were presented in the application.		
C.4. Nepotism and conflict of interest policy	<input type="checkbox"/> Signed Conflict of Interest statement from the Head Administrator.		
NMSA § 22-5-6 ; 22-8B-5.2	<input type="checkbox"/> Evidence the Governing Board and Foundation (if any) are in compliance.		

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.		

Indicators	Documentation	Date Complete	Comments
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		
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	✓ E-Occupancy certificate.	5.15.25	
	✓ PSFA letter certifying NMCI requirements	5.15.25	

Indicators	Documentation	Date Complete	Comments
<i>NMSA § 22-8B-4.2</i>	<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 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	<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.		

Indicators	Documentation	Date Complete	Comments
completed and on file.	<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			