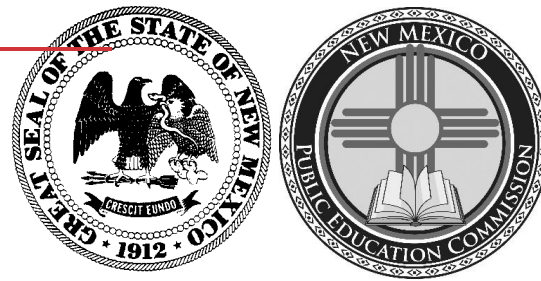


New Mexico Public Education Commission



~~2024-25~~ IMPLEMENTATION YEAR CHECKLIST

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

Approved by the Public Education Commission: October 21, 2022

Updated: ~~August 21, 2024~~ July 18, 2025

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Part I. Introduction

Through charter schools, the Public Education Commission (“PEC”) as Authorizer and the Charter Schools Division (“CSD”) in the New Mexico Public Education Department (“PED”) seek to provide families with effective, quality educational options.

Throughout this document, “Approved Applicant Charter School” shall be referred to as “Charter School” or “School”.

~~PART II. Charter School Contact Information~~

~~School Information:~~

~~Name of Charter School:~~

~~School Address (if known):~~

~~School Location (City/Town):~~

~~School District Within Which School Will Be Located:~~

~~Contract Grades to Be Served:~~

~~Contract Enrollment Cap:~~

~~Founder Contact Information:~~

~~Primary Contact Person:~~

~~Secondary Contact Person:~~

~~Address:~~

~~Address:~~

~~City, State, Zip:~~

~~City, State, Zip:~~

~~Office Phone:~~

~~Mobile Phone:~~

~~Office Phone:~~

~~Mobile Phone:~~

~~E-Mail:~~

~~E-Mail:~~

~~Foundation Information:~~

~~Foundation Name (if applicable):~~

~~Principal Officer:~~

~~Mailing Address:~~

~~City, State, Zip:~~

~~Office Phone:~~

~~Mobile Phone:~~

~~E-Mail:~~

Part III. Implementation Year Checklist Authority and Purpose

The *Public Education Commission Implementation Year Checklist* serves as a guide and tool for a charter school to develop and produce all necessary materials to demonstrate compliance with all applicable laws, rules, and charter provisions as readiness to operate a public school in New Mexico.

The *Public Education Commission Implementation Year Checklist* also provides an opportunity for a charter school to demonstrate it has the capacity to both operate and function as a place of education and learning. The legal, regulatory, and policy requirements of an authorized charter school are significant. Successful school operators need to both demonstrate an understanding and a capability to institute and implement a program consistent with the requirements presented within this document.

The PEC holds charter schools accountable to all applicable laws, rules, and charter provisions, making the *Public Education Commission Implementation Year Checklist* a requirement for authorization to commence full operations. Prior to the end of the implementation year, a school must apply to the PEC for authorization to commence full operations ([NMAC § 6.80.4.11\[E\]](#)). Successful completion of the Implementation Year Checklist *is required for approval of commencement of operation*.

The PEC makes the final determination regarding commencement of operations, and any conditions of charter approval, after considering the review and recommendations made by the CSD in completing the *Public Education Commission Implementation Year Checklist*. The PEC is not limited by these reviews and recommendations and may request any additional documentation, information, or input that the PEC deems appropriate.

Development of the Implementation Year Checklist

The items identified in the *Public Education Commission Implementation Year Checklist* template are those designed to address local, state, and federal, laws, rules and regulations, charter contract provisions, charter best practices, and PEC directives. Each year, the CSD reviews any changes to the aforementioned laws, rules and regulations, charter contract provisions, charter best practices, and PEC directives and prepares a revised draft *Public Education Commission Implementation Year Checklist* template for review and approval by the PEC. The proposed revised template along with any CSD recommendations is presented to the PEC at a regularly scheduled meeting. The PEC reviews and makes the final determination regarding the draft template and these CSD recommendations. The PEC is not limited by these recommendations and may add, remove, or revise any language presented in the draft template.

On the PEC's web page, within the PED's website, the most recently approved *Public Education Commission Implementation Year Checklist* template is made available.

Directions

1. Any PEC conditions must be completed by the PEC deadlines identified in the approval with conditions of the charter application, and items on the *Public Education Commission Implementation Year Checklist* must be completed on or before May 15 to receive a CSD recommendation regarding commencement of operations.
2. The school must attend all implementation year training and technical assistance sessions hosted by the CSD.
3. All submissions and all documentation must be submitted to the CSD for review on or before the deadlines indicated within each submission window. Documentation should be submitted through the PEC's Epicenter platform.
4. The CSD staff will review all submissions. This review will provide the basis for any recommendation to the PEC. All documentation re-submitted by schools for additional review and/or revision shall be saved in Word or PDF format with the track changes function enabled, to maintain all changes made to the document until the final draft is reviewed and approved by the CSD.
5. The CSD will provide three summary reports to the school which will detail a summary of all findings, issues, and concerns identified by CSD. The school is required to arrange a phone, zoom or in-person conference with CSD within 10 days of receipt of these summary reports. The purpose of this conference will be to discuss the issues and concerns identified by CSD and action steps necessary to resubmit documentation for review.
6. Following receipt of a summary report, the school is required to address and resolve all findings, issues, and concerns 14 days from the date of the conference.
7. All plans, policies, manuals, and other documents submitted by the school are considered to be in draft status until they have been approved by the CSD and subsequently by a vote of the school's governing board.
8. Key Terms:
 - a. An **"Indicator"** is a stated compliance objective that must be addressed and completed by the school. These objectives may be legal, regulatory, charter contract provisions, charter school best practices, or PEC directives.
 - b. **"Documentation"** requires a school to submit copies of all policies, procedures, forms, protocols, spreadsheets, documents, or any other material that will provide evidence that the school has addressed or completed the relevant indicator and compliance objective.

- c. **“Date of Completion”** is the date that CSD certifies that documentation addressed or completed the relevant indicator. This field will be left blank until such time as CSD has received sufficient documentation to certify that a relevant indicator was completed.
 - d. **“Findings”** are those CSD comments and notes which identify deficiencies in the “documentation” provided by the school, and which details the reasons why CSD was unable to certify documentation as having addressed or completed the relevant indicator.
 - e. **“Condition”** means the PEC’s approval of the charter school application with conditions as provided in [NMSA §22-8B-6\(M\)](#).
- 9. When an indicator or request for documentation references a statute, rule, or regulation, the school must address each element or provision that is required.
 - 10. Some indicators may require the school to consult, update, and receive approval from different agencies, departments, or divisions within the PED. The school must provide evidence of these consultations where indicated and provide copies to CSD of any materials provided to these different agencies, departments, or divisions.
 - 11. Additional elements may be added to the *Public Education Commission Implementation Year Checklist* based on changes to legislation, statute, regulation, or due to PEC direction or condition.
 - 12. The PEC makes the final determination of commencement of operations, after considering the review and recommendations provided by the CSD. The PEC is not limited by these reviews and recommendations and may request any additional documentation, information, or input that the PEC deems appropriate.

Review Process

Acting as staff support to the PEC, the CSD will review all school submissions and provide a summary report and any findings within 30 days of each submission deadline.

Generally, the CSD review process is as follows:

- 1) The school sends all policies, procedures, and documents related to an indicator or documentation requirement on or prior to the indicated submission date.
- 2) CSD consults any applicable laws, regulations, charter contract provisions, written PEC policies, or written guidance manuals applicable to the indicator or documentation required.
- 3) CSD analyzes the documentation to determine whether all required elements of the applicable laws, regulations, contract provisions, written PEC policies, or written guidance manuals were addressed and satisfied.

- 4) Should all elements be addressed and satisfied, CSD reviews the documentation for completeness, considering feasibility of implementation, i.e., whether the described program is possible, consistent, and reasonable.
- 5) Finally, CSD reviews implementation and consistency in relationship to all other policies and procedures provided by the school.
- 6) In the case of PEC imposed condition(s), the CSD reviews documentation provided that addresses and satisfies the specific condition(s) imposed by the PEC.
- 7) All documentation re-submitted for additional review and/or revision shall be saved in Word or PDF format with the track changes function enabled, to maintain all changes made to the document until the final draft is reviewed and approved by the CSD. All submitted documents must be submitted electronically via the method provided by CSD.
- 8) Two Weeks Prior to Opening Review – The CSD will review for completeness all required indicators. If the school fails to submit and/or provide any items due two weeks prior to opening date, the CSD will inform the PEC.

Part IV. Implementation Year Checklist

School-Specific Conditions from PEC Motion

Condition	Documentation	Date Complete	Comments
Summary Report - Conditions			

Items due by October 1

Indicator and Documentation Needed	Date Complete	CSD Comments
1. Board of Finance Designation		
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.		
2. Administrative Licensure		
<u>Administrative license or plan for obtaining licensure at least 90 days prior to contract effective date</u>		
<u>Summary Report</u>		

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Items due by November 15

Indicator and Documentation Needed	Date Complete	CSD Comments
1. The Governing Board established, has completed the New Member Training and is operating according to bylaws and in accordance with the Open Meetings Act.		
List of governing body members. Include the governing body positions to be held, either a place of residence or work, and contact information.		
Evidence each Board member has completed the 10-hour New Member Course.		
Bylaws include provision for creating-audit and finance committees and include provision for replacing and removing members		

Audit and Finance Committee – Evidence that the sub-committees have been formed, have scheduled meetings, and list of committee membership.		
The Governing Board has drafted an annual calendar of meetings, key Governing Board tasks, and reporting requirements.		
Transparent, annual process for selecting and appointing Equity Council members that reflect student demographics.		
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.		
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		
Annual Open Meetings Act Resolution as well as plan to update annually		
IPRA policy and procedures that comply with state law.		
Name of the foundation, name of the principal officers, and their contact information.		
Conflict of interest policy and procedures, for the Governing Board and school personnel		
Anti-nepotism policy and procedures.		
Background check policy and procedures.		
2. School is established as a formal public-school entity in the state of New Mexico with all necessary tax identification numbers, bank accounts, etc.		
Evidence the school has begun the process in securing individual ORI Number for obtaining background checks.		
FERPA policy and procedures.		
Complaint and grievance policy including a process for receiving, tracking, and resolving community, parental, and other public complaints.		
Volunteer policies and procedures. To include provisions for background check requirements.		
Bank records or other evidence that shows a public entity account has been established at an NM banking institution.		
Tax ID numbers (federal and state).		
Nontaxable Transaction Certificates		
Unique Entity ID (UEI) number required to receive federal funding		
W-9 Form (submitted to DFA through PED).		
3. Initial Basic Operating Policies and Procedures have been developed and approved by Governing Body.		

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).		
Special population services development plan, to ensure development of plans, policies, and procedures to serve special education, ELL, and 504 Plans.		
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.		
4. Development Plans		
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		
Assurance the school has developed any needed policies, procedures, and memoranda to comply with the Black Education Act.		
Plan including responsible parties, timelines, and action steps for how the governing body will identify, recruit, and hire a prospective head administrator.		
Detailed timeline and criteria for recruiting, interviewing, selection, conducting background checks, and signing a contract for the head administrator by May 15.		
Develop a Head Administrator(s) evaluation process with timeline, responsible parties, forms and outcomes (evidenced in annual calendar)		
5. Detailed Staffing Plan		
List of all prospective staff positions and licensure requirement for each.		
6. Enrollment processes and policies that comply with state and federal requirements		
Detailed lottery policies that comply with state guidance.		
All necessary forms that will be used for lottery admissions		
Detailed enrollment policies that comply with state guidance.		
All necessary forms that will be used for enrollment processes.		
Evidence that the school is advertising including the methods of advertisement to recruit diverse student populations.		
7. State Accountability System Choice		
<input type="checkbox"/> Option 1: School's overall performance on the state accountability system		

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<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 (<i>school's serving ONLY high school students, must choose option 2</i>)		
8. Attend all planning year conferences to discuss issues, concerns, and findings identified in the Checklist.		
Attended all Technical Assistance Training Sessions		
The school scheduled with CSD within 10 days or receiving the November 15 Summary Report.		
Revise policies and provide additional documentation to resolve all findings, issues, and concerns identified in the October 1 review or discussed during the October 1 conference.		
9. CSD Summary Report		

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Items due by March 15

Indicator and Documentation Needed	Date Completed	CSD Comments
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.		
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 1 and the status of all board members training, to date.		
3. Student Membership		
Student membership for the upcoming school year to CSD with supporting evidence		
Indicate number of students by grade level		
4. Status report on the development and acquisition of facilities that meet E-Occupancy, NMCI requirements, and ownership/lease requirements.		
Status report on all actions taken to acquire a facility or a letter of commitment for an appropriate facility.		
If the school has not identified an appropriate facility, provide a detailed action plan, with steps, responsible parties and timelines.		
Expected date of E-Occupancy certificate or actual certificate.		

Construction items that must be completed before an E-Occupancy can be granted.		
NMCI score or expected date to receive score.		
PSFA approval or identify items that must be completed before approval can be secured.		
5. Financial Control		
Fully integrated accounting system to record and report all financial transactions		
Internal Control procedures		
Identify the Chief Procurement Officer		
Procurement procedures consistent with state and federal law and regulations.		
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).		
Tobacco, alcohol, and drug-free policies and procedures.		
Medical cannabis policies and procedures.		
Bullying prevention policies and procedures.		
Dual credit policies and procedures (high schools).		
Distance and hybrid learning policies and procedures.		
Grade change policies and procedures.		
Policies and procedures for ensuring parental access to information regarding professional qualifications of teachers, instructional support providers, and principals.		
Forms or tracking tool for ensuring parental access to information regarding professional qualifications of teachers, instructional support providers, and principals.		
Student information system security policies and procedures.		
Staff discipline policies and procedures.		
Policy, process, or plan to disseminate <i>Code of Ethics</i> and <i>Standards of Professional Conduct</i> to all licensed employees.		
Policies and procedures for detention, suspension, or expulsion.		
Student discipline policies and procedures.		
Student and/or Parent Handbook.		
Staff Handbook.		
7. Curriculum Plan		
Status report on implementation of Special Population Development Plans.		
Status report on implementation of curriculum development plan.		

8. MLSS and SAT		
Multi-Layered System of Supports (MLSS) policies, procedures		
Student Assistance Team (SAT) policies, procedures		
9. Serving Special Populations		
Evidence the school has consulted with the Language and Culture Division to develop procedures for identifying and serving ELs.		
Plan to identify and serve English Learners, including forms and letters to parents.		
Evidence the school has consulted with the Special Education Division to review plan for IDEA and 504 requirements.		
Homeless education and assistance policies and procedures, to include the McKinney Vento Dispute Resolution. Homeless youth compliant policy and Notice of Educational Rights.		
10. Governing Board Annual Calendar		
Status report on annual calendar		
11.10. Family Engagement		
Family Engagement Plan		
12.11. Attend all implementation year conferences to discuss issues, concerns, and findings identified in the checklist		
Attended all Technical Assistance Training Sessions		
School scheduled a conference with CSD within 10 days of receiving the March 15 Summary Report.		
CSD Summary Report		

Items due by May 15

Indicator and Documentation Needed	Date Complete	CSD Comments
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 15 review or discussed during the March 15 conference.		
2. Head Administrator		
Administrative license or plan for obtaining licensure within 90 days of contract effective date.		
Signed contract with position description.		
<u>Signed Conflict of Interest Statement from head administrator</u>		

3. Membership Projections and Enrollment		
Evidence of current enrollment by grade level and as a percentage of the March 15 projected enrollment.		
<u>Table showing rollout of grades during first charter term</u>		
4. First Year Operating Budget in place		
A Charter School Operating Budget that aligns with current enrollment and that has been submitted to the CSD.		
A 901BCS-10 signed form that aligns with current enrollment and that has been submitted to the CSD.		
<u>If the school is at less than 95% of budgeted enrollment, provide a board approved adjusted budget plan that reflects the decreased enrollment figures</u>		
5. Facilities		
<u>PSFA letter certifying NMCA requirements</u>		
<u>Lease Agreement</u>		
<u>If with a private lessor or foundation, assurances that the lease meets maintenance requirements</u>		
6. Access to OBMS		
OBMS User Form submitted to School Budget Bureau.		
7. Electronic system for management of financial data meets all requirements of statute and code		
Name of software the school plans on using and name of entity that publishes, manages, or operates the software.		
Evidence software includes encumbrance tracking.		
8. 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.		
Evidence software is compatible with NOVA.		
9. Assessment Plan Developed (If the school provides interim assessments)		
Evidence that assessment(s) have been identified and budgeted, and that there has been contact with an assessment vendor		
Provide plan for administration of interim assessment(s) and for administration of all state-mandated assessments, or any other planned assessments		
Provide a schedule for administration of interim assessment(s) and for administration of all state-mandated assessments, or any other planned assessments		

10. Staffing Plan		
Status report on recruitment and hiring to meet staffing plan provided in application		
<u>Status report on a plan for obtaining required licensure to teach identified classes and grade levels</u>		
Timelines to secure licensing and backgrounds for each prospective staff member		
Special education staffing plan		
Special education staff contracts.		
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.		
<u>Evidence of a licensed gifted provider either on staff or on contract. If school has no identified gifted students, evidence of a plan to provide these services if needed.</u>		
<u>Signed contracts supporting minimum salaries and detailed position descriptions</u>		
11. Professional Development Plan		
Plan and forms to implement professional development plans (PDPs) for individual teachers.		
Evidence the school has communicated with the Educator Growth and Development Bureau for required PDP management systems.		
12. Employee benefits and Risk Insurance coverage through the New Mexico Public Schools Insurance Authority (NMPSIA).		
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).		
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).		
13. Health, Safety, and Wellness Policy Requirements		
Health services policies and procedures.		
Wellness policies and procedures pursuant to 6.12.2 NMAC submitted to the Student Success and Wellness Bureau for review.		
<u>Plan to submit</u> Safe Schools Plan pursuant to 6.12.6 NMAC submitted to the Safe and Healthy Schools Bureau for review.		
Plan for implementation of required emergency drills, including dates and types of drills for the school year.		
Gun Free Schools policy.		

Health and wellness curriculum, scope and sequence that aligns to the NM content standards for all grades served.		
Physical education curriculum, scope and sequence, that aligns with the NM content standards for the grades served.		
Immunizations policies and procedures.		
Pest control policies & procedures.		
14. Serving Special Populations		
Special education & 504 policies and procedures.		
Completed special education policies.		
Procedures and all necessary forms for tracking special education direct student services.		
English Learner policies and procedures that align with federal and state guidance.		
All forms and surveys for implementation of EL policies and procedures.		
15. Directed Program Time Requirements		
Schedule that ensures minimum directed program time and adequate instructional time for grades served.		
Calendar that ensures minimum directed program time and adequate instructional time for grades served.		
Any other necessary documentation that ensures minimum directed program time and adequate instructional time for grades served.		
16. High school and middle school requirements		
Graduation requirements (schools that serve grade 12).		
Next Step Plan forms, policies and procedures (schools that serve grades 8-12).		
School Athletic Equity policies and procedures (schools that serve grades 7-12).		
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).		
Evidence the school has a signed Dual Credit Master Agreement with an institution of higher education (schools that serve grades 9-12).		
Evidence the school has a program of distance learning courses in place (schools that serve grades 9-12).		
Evidence the school is prepared to offer at least two years of a language other than English (schools that serve grades 9-12).		
17. Budget Approval		

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).		
18. Attend all implementation year conferences to discuss issues, concerns, and findings identified in the Checklist.		
Attended all Technical Assistance Training Sessions.		
The school scheduled a conference with CSD within 10 days of receiving the May 15 Summary Report.		
CSD Summary Report		

School-Specific Conditions from PEC Motion

Condition	Documentation	Date Complete	Comments
Summary Report - Conditions			

Commencement of Operations Checklist: PEC Meeting

Indicator and Documentation Needed	Date Complete	CSD Comments
1. Board of Finance Designation		
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.		
<u>2.1. Facilities</u>		
Assurances to demonstrate the lease, lease purchase, or ownership arrangement complies with NMSA § 22-8B-4.2		
Evidence school has timely submitted all required application materials to PSFA for lease reimbursement payments by its deadlines.		
<u>3.2. Contract and framework negotiation and approval process.</u>		
PEC approval of any substantial changes to the educational model, staffing, organizational, and governance plan, or finance plan that were presented in the application.		

4.3. Nepotism and Conflict of Interest		
Evidence the Foundation board complies (if applicable)		
<u>Signed Conflict of Interest statements from all currently seated board members</u>		
<u>Schedule Pro-Opening Site visit with Charter Schools Division</u>		
<u>School scheduled their pre-opening site visit</u>		

Items Due Two Week Prior to Opening

Indicator and Documentation Needed	Date Complete	CSD Comments
1. Resolve all findings in the checklist		
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.		
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.)		
Resources necessary for the implementation of the curriculum as articulated are available.		
Curriculum identifies resources, knowledge and skills students are expected to learn (NMCCSS/NMCS).		
Curriculum identifies the learning standards or learning objectives students are expected to meet for each course.		
Curriculum identifies the units and lessons that teachers will teach.		
Curriculum identifies example assignments and projects that will be given to students.		
Curriculum identifies example books, materials, videos, presentations, and readings used in a course.		
Curriculum identifies example tests, assessments, and other methods used to evaluate student learning		
3. School has implemented and adopted a budget and all mandatory policies.		
Signed statement from the governing body that the final budget, the final operating budget, and any revised policies were adopted and implemented.		
4. Facilities		
E-Occupancy certificate.		
<u>PSFA letter certifying NMCI requirements</u>		
<u>Lease. If with a private lessor or foundation, assurances that the lease meets maintenance requirements.</u>		

5. Recruitment and hiring of adequate number of teachers and support personnel to match assignments and staffing plan, as adapted for actual enrollment		
Licenses and credentials in staff files or a plan for obtaining required licensure within 90 days.		
School has necessary licensure to teach identified classes and grade levels or a plan for obtaining required licensure within 90 days.		
Criminal background checks and fingerprinting documentation in each staff file.		
Evidence that licensed school employees are in compliance with nepotism and conflict of interest policies.		
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.		
Evidence of a licensed diagnostician available for special education evaluation referrals.		
6. Relevant and necessary student forma completed and on file		
Completed student enrollment forms. Forms must indicate there is enrollment for a minimum of 8 students with New Mexico Residency.		
Completed Language Usage Survey for any students new to the NM Public School system.		
IEPs for all identified students or evidence that an IEP meeting has been requested.		
Summary Report – Items Due Two Weeks Prior to TO Opening Date		

CHECKLIST RESOURCES		
Indicator	Requirement	Resource
The Governing Board established, has completed the New Member Training and is operating according to bylaws and in accordance with the Open Meetings Act.	Board Training	NMSA §22-8B-5.1
	Bylaws	NMSA § 22-8-12.3
	Board Committees	NMSA § 22-8-12.3
	Equity Council	PED guidance
	Meeting Compliance	NMSA § 22-8B-5.5; NMSA § 10-15-1 F-G, et seq.
	Annual OMA	NMSA § 10-15-1 (D)
	IPRA	NMSA § 14-2-1, et seq.
	Foundation	PEC Policy

	Conflict of Interest	NMSA § 22-8B-5.2.
	Anti Nepotism	NMSA § 22-8B-10.
	Background checks	NMSA § 22-10A-5.
Initial Basic Operating Policies and Procedures have been developed and approved by Governing Body.	FERPA	20 U.S.C. § 1232g.
	Complaint and Grievance	6.10.3 NMAC
	Volunteers	6.50.18.8 NMAC.
	Non-Taxable Transaction Certificate	http://tax.newmexico.gov/Businesses/non-taxable-transaction-certificates.aspx
	Unique Employer ID	https://sam.gov/content/duns-uei
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
	Consultation with Indian Ed	NMSA § 22-23A, 6.35.2 NMAC
Development Plan	Consultation with Language and Culture	NMSA § 22-23B
	Black Education Act	NMSA § 22-23C; 22-10A-19.3
Detailed Staffing Plan	List of all prospective staff positions and licensure requirement for each.	6.29.1.9 NMAC
Enrollment processes and policies	Lottery	CSD Lottery FAQ NMSA § 22-8B-4.1; 6.80.4.12 NMAC;
Student Membership		NMSA § 22-8-12.1.
Facilities Status Report		NMSA § 22-8B-4.2
Financial Control	Fully integrated accounting system	6.20.2 NMAC, the Public-School Code, Chapter 22, NMSA, 1978 Compilation and Generally Accepted Accounting Principles (GAAP), and federal laws and regulations.
	Internal Control Procedures	6.20.2.11 – 6.20.2.18 NMAC
	CPO	NMSA § 13.1-95.2
	Procurement	NMAC § 6.20.2.17; 34 CFR 74.44.
Mandatory operational policies and procedures have been developed.	Attendance policies	NMSA § 22-12A-6 et seq.
	Tobacco, alcohol, and drug-free policies and procedures.	6.12.4 NMAC
	Medical cannabis policies and procedures.	6.12.10 NMAC

	<u>Bullying prevention policies and procedures.</u>	<u>6.12.7.8-10 NMAC</u>
	<u>Dual credit policies and procedures (high schools).</u>	<u>6.30.7.8 NMAC</u>
	<u>Distance and hybrid learning policies and procedures.</u>	<u>6.30.8 NMAC</u>
	<u>Grade change policies and procedures.</u>	<u>6.30.10 NMAC</u>
	<u>Policies, procedures, and any forms for ensuring parental access to information regarding professional qualifications of teachers, instructional support providers, and principals</u>	<u>NMSA § 22-10A-16.</u>
	<u>Student information system security policies and procedures.</u>	<u>6.19.5.8 NMAC</u>
	<u>Staff discipline policies and procedures.</u>	<u>6.69.2.8 NMAC</u>
	<u>Policy, process, or plan to disseminate <i>Code of Ethics</i> and <i>Standards of Professional Conduct</i> to all licensed employees.</u>	<u>6.60.9.8, 6.60.9.9 NMAC</u>
	<u>Policies and procedures for detention, suspension, or expulsion.</u>	<u>6.11.2.12 NMAC</u>
	<u>Student discipline policies and procedures.</u>	<u>6.11.2.1 NMAC, et seq.</u>
<u>Curriculum plan.</u>		<u>6.29.1.9 NMAC</u>
<u>MLSS and SAT</u>		<u>NMAC § 6.29.1.9; State Guidance.</u>
<u>Serving Special Populations</u>		<u>IDEA 2004; 29 U.S.C. § 701 (Section 504 of the Rehabilitation Act of 1973)</u> <u>NMSA § 22-13-5 to 22-13-8;</u>

		<u>6.29.1.9; 6.29.5.1, et seq.; 6.31.2, et seq.; ; and 6.10.3.9(D) NMAC</u> <u>Homeless Guidance, NM Educational Stability Guidelines IDEA 2004; 29 U.S.C. § 701 (Section 504 of the Rehabilitation Act of 1973)</u> <u>NMSA § 22-13-5 to 22-13-8;</u> <u>6.29.1.9; 6.29.5.1, et seq.; 6.31.2, et seq.; ; and 6.10.3.9(D) NMAC</u> <u>Homeless Guidance, NM Educational Stability Guidelines</u>
<u>Head Administrator</u>		<u>NMSA § 22-10A-3; 22-8B-10.</u>
<u>Membership Projections & Enrollment.</u>		<u>NMSA § 22-8-12.1</u>
<u>First Year Operating Budget in place.</u>		<u>NMSA § 22-8-11.</u>
<u>Access to OBMS</u>	<u>OBMS User Form</u>	<u>6.20.2.10 NMAC</u>
<u>Electronic system for management</u>		<u>6.20.2.9 (F) NMAC, the Public-School Code, Chapter 22, NMSA 1978 Compilation, and Generally Accepted Accounting Principles (GAAP) and federal laws and regulations.</u>
<u>Assessment Plan Developed.</u>		<u>NMAC § 6.80.4.9. 2024-25 Assessment & Accountability Memo</u>
<u>Professional Development Plan</u>		<u>6.60.10; 6.65.2.8; 6.30.5.13;</u>
<u>Employee benefits and Risk Insurance coverage through the New Mexico Public Schools Insurance Authority (NMPSIA).</u>		<u>NMSA § 22-8B-9;</u> <u>NMAC § 6.50.1 et. seq;</u> <u>Charter Contract</u>
<u>Health, Safety, and Wellness Policy Requirements</u>		<u>6.12.2 NMAC; Health Education Guidance Document. NMSA § 30-7-2.1; 32A-2-33</u> <u>6.29.1.9(O)(6); 6.12.1, et seq. NMAC</u> <u>Wellness Policy Guidance Document;</u>

		<u>Health Education Guidance Document;</u> <u>Homeless Policy Guidance Document;</u> <u>Charter Contract</u>
	<u>Wellness Policy</u>	<u>6.12.6 NMAC</u>
	<u>Safe Schools Plan</u>	<u>6.12.6 NMAC; Safe Schools Guidance.</u>
	<u>Emergency Drills</u>	<u>NMSA §22-13-14</u>
	<u>Gun free Schools</u>	<u>NMSA § 30-7-2.1; 32A-2-33.</u>
	<u>Health and Wellness Curriculum</u>	<u>6.29.6.1 et. seq. NMAC</u>
	<u>Physical Ed Curriculum</u>	<u>6.29.9.1 et. seq. NMAC</u>
	<u>Immunizations policies and procedures.</u>	<u>6.12.2.8 NMAC</u>
	<u>Pest control policies & procedures.</u>	<u>6.29.1.9(P) (6) NMAC</u>
<u>Serving Special Populations</u>		<u>IDEA 2004; 29 U.S.C. § 701 (Section 504, Rehabilitation Act of 1973);</u> <u>NMSA § 22-13-5; 22-13-8);</u> <u>6.29.1.9; 6.29.5.1, et seq.; 6.31.2, et seq. NMAC</u> <u>34 C.F.R. § 300.201</u>
<u>Directed Program Time Requirements.</u>		<u>NMSA § 22-8-9; 22-2-8.1; 6.29.1.9(J) NMAC;</u> <u>Instructional Hours Worksheet.</u>
<u>High school and middle school requirements.</u>	<u>Graduation requirements</u>	<u>NMSA § 22-13-1.1</u>
	<u>Next Step Plan</u>	<u>NMSA § 22-13-1.1</u>
	<u>School Athletic Equity</u>	<u>6.13.4 NMAC</u>
	<u>Honors Classes</u>	<u>NMSA § 22-13-1.4.</u>
	<u>Dual Credit</u>	<u>NMSA § 22-13-1.4.</u>
	<u>Distance Learning</u>	<u>NMSA § 22-13-1.4.</u>
	<u>at least two years of a language other than English</u>	<u>NMSA § 22-13-1.4.</u>
<u>Budget Approval</u>		<u>6.20.2.9 NMAC</u>
<u>Board of Finance</u>		<u>NMSA § 22-8-38[B]; 6.80.4.16[A] NMAC; PEC Policy</u>
<u>Facilities</u>		<u>NMSA § 22-8B-4.2.</u>

Nepotism

NMSA § 22-5-6; 22-8B-5.2