AGENDA ITEM EXECUTIVE SUMMARY

I.   Public Education Commission Meeting Date: July 19, 2017

II.   Item Title: Discussion and Possible Action on Charter School Amendment Request Policies and Protocols

III.   Executive Summary and Proposed Motions:

The attached materials were provided to the Commission for the June meeting and incorporate revisions discussed during the June work session. The commission did not have time to review all proposed amendment protocols and policies during the June work session.

Amendments	Submission Windows
Additional Programming for New School Population	**January - May**
Charter Mission	**All Year**
Enrollment Cap	~~January - May~~**At Least Two Months Prior to School's Enrollment Period**
Grade Level Change to Contract	**January - May**
Permanent Change to Overall Instructional Hours	**October - April**
New School or School Site	**August - December**
Educational Program	**January - May**
Partner or Management Company	**All Year**
Performance Framework Academic Goal not based on change in Interim Assessment	**May - July**

Notifications	Submission Windows
Head Administrator or Governing Body Membership or Contact Information	**All Year**
Business Manager or Procurement Officer	**All Year**
School Policies or Governing Body Bylaws	**All Year**
Non-Profit Foundation or Component Unit	**All Year**
Membership of Non-Profit Foundation or Component Unit	**All Year**
School Closure	**All Year**
School Name Change	**All Year**
School Location	**All Year**~~May - July~~
Performance Framework Academic Goal based on change in Interim Assessment	**April - July**
School Specific Change in Grades Served	**January - May**
Temporary Change in Overall Instructional Hours	**August - May**
Facilities Master Plan	**All Year**
Lease Terms or Facility Ownership	**All Year**
Admission or Lottery Policies or Procedures	**June - December**
Insurance Coverage or Amounts/Types	**All Year**
Food or Transportation Services	**May - July**

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Table of Contents

Introduction

The Guide to Amending a Charter ("The Guide") is a comprehensive document for charter school leaders and boards that includes information about all components and requirements of the amendment and notification request process. The purpose of this document is to provide guidance and answer common questions about when and how to submit requests. This guidance includes a "Terms to Know" section to further clarify language used in the requests, as well as guidelines for the various attachments required for submitting certain requests. Additionally, it serves to provide clarification to charter school leaders and boards about the procedures the Public Education Commission ("PEC") and the Charter Schools Division ("CSD") follows for processing and evaluating requests once they have been submitted.

Pursuant to NMSA 1978 §22-8B-9(C), charter contracts may be revised or amended only with the approval of the chartering authority and the governing body of the charter school. Charter amendments and revisions requiring prior written approval by the PEC are made by filing an amendment or notification request. The charter school leader and board shall not take action or implement the modification requested until approved by the PEC.

The PEC has developed procedures and rules for submitting amendments and notifications for approval. This guide provides information about those rules and procedures, as well as the specific situations that warrant use of these processes. *Charter modifications that are not included as part of the amendment and notification request process may be implemented without the approval of the PEC.*

Although this guide is intended to be a comprehensive resource for charter school leaders and boards, not all scenarios can be anticipated. If you are unable to find information in regard to your particular scenario, contact the CSD at charter.schools@state.nm.us.

The following chart identifies which requests are Amendments and Notifications.

Amendments	Notifications
Additional Programming for New School Population	Head Administrator or Governing Body Membership or Contact Information
Charter Mission	Business Manager or Procurement Officer
Enrollment Cap	School Policies or Governing Body Bylaws
Grade Level Change to Contract	Non-Profit Foundation or Component Unit
Permanent Change to Overall Instructional Hours	Membership of Non-Profit Foundation or Component Unit
New School or School Site	School Closure
Educational Program	School Name Change
Partner or Management Company	School Location
Performance Framework Academic Goal not based on change in Interim Assessment	Performance Framework Academic Goal based on change in Interim Assessment
	School Specific Change in Grades Served

	Temporary Change in Overall Instructional Hours
	Facilities Master Plan
	Lease Terms or Facility Ownership
	Admission or Lottery Policies or Procedures
	Insurance Coverage or Amounts/Types
	Food or Transportation Services

Bolded amendments are expansion requests

Amendment Process

General Overview

Charter contracts can be amended through the amendment and notification request process. When a charter school board determines that it intends to make a change to its contract, the Head Administrator must file a request and receive notice of approval prior to implementing the change.

A request is either classified as an amendment or a notification. The chart below describes the differences between an amendment and notification.

Amendments	Notifications
Make a material change to the charter contract	Notify the PEC of a non-material change in the charter's operations
A Compliance Check will be conducted for each request	A Compliance Check may be conducted
Placed on the PEC agenda for consideration	Placed on the PEC agenda as a consent item, unless full consideration is requested by the PEC

The PEC provides instructions, specific to each individual request on its website. The request instructions for each amendment or notification include eligibility requirements, information about form fields and attachments, and checklists for completeness. However, additional guidance to assist the Charter school leader and board in meeting these requirements is found in The Guide.

All amendment and notification requests must be submitted by email to charter.schools@state.nm.us by the Head Administrator.

The general steps taken in the amendment and notification request process are outlined in the chart below.

Amendment Submission	The Head Administrator submits the request by email to Charter.Schools@state.nm.us.
Administrative Review	The request is reviewed for administrative completeness to ensure the components listed in the administrative completeness review checklist meet the criteria. The CSD has 10 business days for administrative review. The Charter school leader and board are notified by email of the result of the review.
Substantive Review	The request is reviewed for substantive completeness to determine if all components of the request have been addressed using the substantive completeness review checklist. The CSD has 20 business days for substantive review. The Charter school leader and board are notified by email of the result of the review.
PEC Consideration	If a request is substantively complete, it will be placed on the agenda of a regular PEC meeting.

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Timeframes

Requests must be submitted timely so that they may be processed within the timeframe provided in the PEC's policy. Review the submission windows below to determine the deadline for submitting an amendment request to be considered by the PEC by a specified date. If a request is deemed administratively or substantively incomplete, the information contained in the chart below will not apply.

Submission Deadline	PEC Meeting Date* Meeting will be held at 300 Don Gaspar, Mabry Hall, Santa Fe, unless otherwise indicated on the posted agenda
N/A	August—No Meeting Scheduled
July 21, 2017	September 1, 2017
August 30, 2017	October 13, 2017
October 4, 2017	November 17, 2017
October 30, 2017	December 14-15, 2017

*PEC meeting dates are subject to change in the event a quorum of the PEC is not available. Check the PEC's website for updates.

Once a request has been submitted, the PEC has 30 business days to process it. The PEC and CSD will process amendments in a timely manner in the order in which they are received. If additional information is required during the substantive completeness review, the "clock" is stopped, and starts again once the request has been resubmitted. Any time the clock stops, it may delay the PEC's consideration of the request.

Administrative Completeness Review

To ensure that all required components of a request have been submitted, an administrative completeness review is conducted. An administrative completeness criteria checklist for each request is provided in the instructions for each individual request. The checklist will be used by The PEC and CSD in the administrative review.

The diagram below demonstrates the steps in the Administrative Review Process:

```
        ┌──────────────────────────┐
        │ Amendments/Notifications │
        │        submitted         │
        └──────────────────────────┘
                     │
        ┌──────────────────────────┐
        │   Administrative Review  │
        └──────────────────────────┘
             │                │
        ┌─────────┐      ┌────────────┐
        │Complete │      │ Incomplete │
        └─────────┘      └────────────┘
             │                │
        ┌──────────────┐  ┌────────────────┐
        │ Substantive  │  │ Request Closed │
        │   Review     │  │                │
        └──────────────┘  └────────────────┘
```
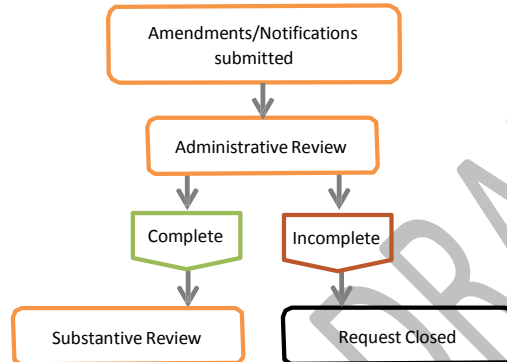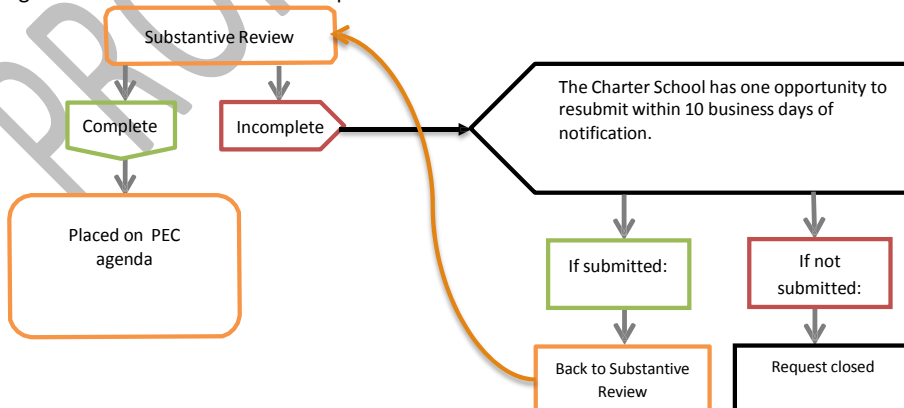
Substantive Completeness Review

To ensure that all components of the request have been addressed, a substantive completeness review is conducted. A substantive completeness criteria checklist for each request is provided in the instructions for each individual request and used by the PEC and CSD.

- A required document or narrative prompt will be evaluated as "acceptable" or "not acceptable" by the PEC and CSD.
- An "acceptable" narrative response
    - Addresses every applicable part of the prompt;
    - Provides a clear and detailed response; and
    - Is consistent among the components of the request.

The diagram below demonstrates the steps in the Substantive Review Process:

```
        ┌──────────────────────┐
        │  Substantive Review  │
        └──────────────────────┘
          │              │
     ┌──────────┐   ┌────────────┐     ┌────────────────────────────────┐
     │ Complete │   │ Incomplete │────▶│ The Charter School has one     │
     └──────────┘   └────────────┘     │ opportunity to resubmit within │
          │                            │ 10 business days of            │
     ┌──────────────┐                  │ notification.                  │
     │ Placed on PEC│                  └────────────────────────────────┘
     │    agenda    │                      │               │
     │              │                ┌──────────────┐  ┌──────────────┐
     └──────────────┘                │ If submitted:│  │ If not       │
                                     └──────────────┘  │ submitted:   │
                                          │            └──────────────┘
                                     ┌──────────────┐       │
                                     │ Back to      │  ┌────────────────┐
                                     │ Substantive  │  │ Request closed │
                                     │ Review       │  └────────────────┘
                                     └──────────────┘
```

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Compliance Checks

A compliance check may occur as part of the amendment and notification request approval process. Please refer to the PEC's Policy Statement on Conducting Compliance Checks for further information on this process.

The PEC has adopted an Organizational Performance Framework, which uses information from a variety of sources, to evaluate a charter school's organizational performance. When a compliance check is conducted during the substantive review process, areas found to be non-compliant will be reported in accordance with the Operational Framework.

Expansion Requests

Expansion requests are amendments that expand a current charter school's operations by increasing the number of students, range of grade levels, etc. As a result, expansion requests have eligibility criteria, undergo a CSD recommendation review, and have additional submission requirements.

The following are expansion requests:

- New School or School Site
- Grade Level Change to Contract (Increase only)
- Enrollment Cap (Increase only)
- Additional Programming for New School Population

Eligibility Criteria

The expansion process is open to any charter school leader and board if the school has:

- Received no lower than a "C" letter grade in any of the past three years;
- Met each of its mission specific goals in each of the last three years;
- Has not had any multi-year repeat findings in any of the past three years;
- Has received an unmodified audit opinion in each of the past three years;
- Is not currently on monthly reporting with the School Budget and Financial Analysis Bureau that has been required for more than 1 year;
- Has not had its board of finance revoked within the last three years; and
- Has maintained at least75% student retention within and between school years in each of the last three years.

Staff Recommendation Criteria

Recommendation criteria will be used to determine whether or not the CSD will recommend the PEC approve the request. The criteria to receive a staff recommendation for each specific request are included in the individual request instructions. A charter school must fulfill all listed criteria to receive a CSD recommendation for expansion.

Curriculum Samples

Curriculum samples are an additional submission requirement for the Grade Level Change to Contract Amendment Request. This requirement only applies to charter school's whose letter grade in the

current year is lower than an "CA." For further information about curriculum sample guidelines, see the Grade Level Change to Charter Amendment Request Instructions and Curriculum Sample Instructions and Template on the PEC's website.

Financial Performance Eligibility

Financial performance requirements and submissions may be added when the PEC revises its performance framework. A school whose board of finance is currently suspended is not eligible to submit any amendment requests, but may submit any applicable notifications.

Attachment Guidelines

General Guidance

Amendment and notification requests require the attachment of documents. Each request identifies the specific attachments required for the individual request, as well as the administrative and substantive completeness requirements for each document. This section provides general guidance about formatting attachments.

Formatting

When a document is created and saved, fonts must be no less than 11 point. All attachments must be saved in PDF format prior to attaching. If the attachment is a scanned image, the image must be legible. Scanned images must be no less than 100% of the original size, except for building floor plans or architectural renderings.

Before saving a document, ensure that it meets all criteria, is thoroughly proofread, and contains accurate information.

Attachments

This section provides information about the content of the attachments that are required throughout the requests. Each individual request has an "Attachments" section that identifies which of these specific attachments is required with the submission. Note that numerous requests include the same attachments, as noted below. Many of the attachments are forms that must be filled out and/or signed, then scanned and included with each request. These forms can be found in Appendix B: Forms, unless otherwise noted.

Affidavit and Disclosure

An Affidavit and Disclosure must be completed for each new Head Administrator or Principal added by the notification request. Each form must be signed and dated by the individual named on the form. The form must be notarized before it is scanned and uploaded with the request.

Included in the following:
- Head Administrator or Governing Body Membership Notification
- Business Manager Notification
- Membership of Non-Profit Foundation or Component Unit

Board of Finance Application

A complete Board of Finance Application must be submitted when there are changes to the makeup of the school's Board of Finance. The complete application including 1) an affidavit or affidavits, signed by the personnel who will be given the responsibility of keeping the financial records of the charter

school, describing the training completed, professional licensure held and degrees earned by them; 2) a statement signed by every member of the governing body that the governing body agrees to consult with the department on any matter not covered by the manual of accounting and budgeting before taking any action relating to funds held as a board of finance; 3) a signed affidavit from each governing body member declaring that the member is not a governing body member of any other charter school and that the member was not a governing body member of another charter school that was suspended or failed to receive or maintain their board of finance designation; and 4) d. a letter from Poms & Associates verifying that the charter school is a participant in the public school insurance authority; and indicates that the person who will be entrusted with handling the funds of the charter school is adequately insured.

Included in the following:
- Governing Body Membership Notification
- Business Manger Notification

Board Minutes

Board minutes demonstrate that the proposed change has been approved by the Charter school board. Ensure that minutes:
- Comply with the Open Meeting Act;
- Are final approved minutes;
- Demonstrate that the Board is in alignment with what is on file with CSD; and
- Clearly indicate approval of the amendment request to make the proposed change.

Included in all requests

Curriculum Samples

Curriculum samples provide a representation of a program of instruction aligned to the New Mexico Common Core State Standards and New Mexico Content Standards and to the methods of instruction described in the charter. The curriculum   samples provide an opportunity for the charter school to demonstrate the capacity to develop a curriculum aligned to these Standards in the areas of Reading, Writing, Math, and Science.

More specific directions regarding formatting, page limits, choosing standards, and expectations for addressing instructional rigor can be found on the Curriculum Sample Template (found on the PEC's website and in the Grade Level Change to Charter Amendment Request Instructions).

Included in the following:
- Grade Level Change to Charter Amendment (Increase Only)
- Educational Program Amendment
- Additional Programming for New School Program

Daily Instructional Schedules

Provide the instructional schedule for each grade level served by the school for which the change is requested. NMSA 1978 § 22-2-8.1(A) states that "students shall be in school-directed programs, exclusive of lunch" for the minimum horse identified by grade level. Ensure that the schedules clearly identify which time periods are instructional (school directed programs), and which are not. If the school calendar identifies any alternative daily schedules (e.g. early release days), ensure that instructional schedules include the time periods for these days.

Included in the following:
- Overall Instructional Hours Amendment
- Additional Programming for New School Program

Enrollment Matrix

On the Enrollment Matrix, the Charter school will identify three year enrollment projections. An Enrollment Matrix must be completed, identifying the current and target enrollments, should the request be granted. In the case of a New School or School Site Amendment, the Charter school leader and board must also submit an Enrollment Matrix describing the subsequent three fiscal years for the proposed school.

Included in the following:
- Enrollment Cap Amendment
- Grade Level Change to Charter Amendment
- New School or School Site Amendment
- School Location Notification
- School Specific Change in Grades Served Notification (Increase only)
- Additional Programming for New School Population

The image below provides an example of a completed Enrollment Matrix.

School Name: ABC Charter School

Grade Level	Number of Students			
	Current—FY17	Target—FY18	Target—FY19	Target—FY20
K	0	0	0	0
1	0	0	0	0
2	0	0	0	0
3	0	0	0	0
4	0	0	0	0
5	0	0	0	0
6	72	72	72	72
7	72	72	72	72
8	72	72	72	72
9	0	24	48	72
10	0	0	24	48
11	0	0	0	24
12	0	0	0	0
Total Enrollment	216	240	288	360

Facility Documentation

Certificate of Occupancy

A Certificate of Occupancy must include the address of the charter school and indicate that the facility is approved for educational use.

Included in the following:
- Enrollment Cap Amendment (Increase only)
- New School Amendment

- School Location Notification
- School Specific Change in Grades Notification (Increase only)

Capacity Documentation

Some requests require that documentation demonstrates a building has appropriate capacity to implement the request as submitted. For these requests, if the Certificate of Occupancy doed not list the building capacity, additional documentation (e.g. floor plans with classroom square footage, architectural drawings indicating internal building dimensions) and a description of how the space is sufficient for the appropriate number of students is required. Hand- drawn images will not be accepted.

Included in the following:
- Enrollment Cap Amendment (Increase only)
- New School or School Site Amendment
- School Location Notification
- School Specific Change in Grades Notification (Increase only)
- Additional Programming for New School Population

NMCI Documentation

NMSA 1978 § 22-8B-4.2(C) provides, "On or after July 1, 2011, a new charter school shall not open and an existing charter school shall not relocate unless the facilities of the new or relocated charter school, as measured by the New Mexico condition index, receive a condition rating equal to or better than the average condition for all New Mexico public schools for that year or the charter school demonstrates, within eighteen months of occupancy or relocation of the charter, the way in which the facilities will achieve a rating equal to or better than the average New Mexico condition index." A charter school seeking approval to occupy a facility must provide documentation from PSFA.

Included in the following:
- Enrollment Cap Amendment (Increase only)
- New School or School Site Amendment
- School Location Notification
- School Specific Change in Grades Notification (Increase only)

Lease Agreement and Ownership or Lease Terms Affidavit

NMSA 1978 § 22-8B-4.2(D) requires specific ownership or lease terms for charter school facilities. A charter school must provide evidence of compliance by providing both the lease (as relevant), lease purchase agreement (as relevant), or purchase contract (as relevant) and an affidavit verifying compliance with legal requirements.

Included in the following:
- New School or School Site Amendment
- School Location Notification
- Lease Terms or Facility Ownership Notification

Liability Insurance Coverage

A charter school leader and board must obtain and maintain insurance in accordance with the laws of the State of New Mexico. A Certificate of Liability Insurance that includes the school's description must be uploaded with the request.

Included in the following:
- New School or School Site Amendment
- School Location Notification

Financial Documentation

The financial documentation must include the following:

- A start-up budget to cover expenses projected to occur during the start-up period (until July 1 of the year the school opens).
- An operational budget to cover the first year of operations.
- For each budget, a separate document describing assumptions for each line item, to include disaggregated costs, and basis for determining those costs. Demonstrate through the assumptions that the amounts listed are viable and adequate for the start-up period and first year of operation.

Included in the following:

- New School or School Site Amendment
- Additional Programming for New School Population
- Grade Level Change to Contract
- School Specific Change in Grades Notification (increase only)

Administrative Licensure

A copy of the administrator's license, or evidence that a licensure has been submitted to the PED, should be submitted.

Included in the following:

- Head Administrator Notification
- New School or School Site Amendment

Narrative

Upload a PDF of the Charter school leader and board's written document that addresses all prompts in a manner that meets the substantive completeness requirements.

Included in the following:

- Enrollment Cap Amendment
- Grade Level Change to Contract Amendment
- Overall Instructional Hours Amendment
- New School or School Site Amendment
- Educational Program Amendment
- School Closure Amendment
- School Location Notification
- School Specific Change in Grades Notification (Increase only)
- Additional Programming for New School Population
- Charter Mission
- Performance Framework Academic Goal Amendment
- Admission or Lottery Policies or Procedures
- Food or Transportation Services

School Calendar

Provide the school calendar for the fiscal year in which the Charter school leader and board intends to implement the request. Ensure that the calendar indicates any days which operate on an alternate daily schedule (e.g. early release days).

Included in the Overall Instructional Hours Amendment.

Staffing Chart

On the Staffing Chart, the Charter school leader and board will identify an anticipated three year staffing plan. On the first page, identify the number of staff members including administrative, instructional, and non- instructional staff, as well as the sum total at the bottom of the chart. The second page includes a chart identifying the leadership team. On this chart, identify specific individuals to demonstrate how existing leadership will be leveraged to implement the changes brought on by the request.

Included in the following:

- Enrollment Cap Amendment
- Grade Level Change to Contract Amendment
- School Specific Change in Grades Notification (Increase only)
- Additional Programming for New School Population
- New School or New School Site

The images below provide an example of both components of a completed Staffing Chart.

School Name: ABC Charter School

Position	Number of Staff Members			
	Current—FY17	Anticipated—FY18	Anticipated—FY19	Anticipated—FY20
Administration	1	1	1	1
Teachers/Instructional Staff				
Kindergarten	0	0	0	0
1st	0	0	0	0
2nd	0	0	0	0
3rd	0	0	0	0
4th	0	0	0	0
5th	0	0	0	0
6th	3	3	3	3
7th	3	3	3	3
8th	3	3	3	3
9th	0	2	2	3
10th	0	0	2	2
11th	0	0	0	1
12th	0	0	0	0
Specialty Staff (Music, Art, PE, etc.)	3	3.5	4	4
Special Education	1	1	1	1
Paraprofessional	1	1	2	2
Additional Staff				
List title: Instructional Coach	0	0	1	1
List title: Office Staff	1	1	2	2
List title: Lunch Staff	1	1	2	2
List title: _____				
Total Number of Staff Members	17	19.5	26	28

School Name: ABC Charter School

	Leadership Team			
Title	Current—FY17	Anticipated—FY18	Anticipated—FY19	Anticipated—FY20
Principal	Morgan Olmos	Morgan Olmos	Morgan Olmos	Morgan Olmos
Instructional Coach	N/A	N/A	Michelle Mills	Michelle Mills
6th Grade Lead	Ed Freeman	Ed Freeman	Ed Freeman	Ed Freeman
7th Grade Lead	Michelle Mills	Michelle Mills	TBD	TBD
8th Grade Lead	Hayley Pfeiffer	Hayley Pfeiffer	Hayley Pfeiffer	Hayley Pfeiffer

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Appendices

A. Terms to Know

B. Forms

A. *Terms to Know*

Charter contract—The legally binding agreement between the Public Education Commission and the entity approved to operate the school(s).

Head Administrator—An individual directly employed by the governing body of a charter school who is responsible for school administration and who has the power to bind a charter school contractually according to the Charter school 's policies.

Concrete resources—Financial support or tangible items provided to staff to aid in implementation of curriculum or professional development strategies.

Criteria—The standard by which CSD determinations will be made for administrative and substantive completeness reviews, and a staff recommendation for approval to the PEC.

Curriculum—The content, programs, and materials that teachers will utilize with students to allow achievement of educational outcomes and mastery of standards.

Curriculum sample—A written description of instructional strategies, student activities, and assessment items (including a copy of the summative assessment items and answer key or scoring rubric, whichever applicable), and a description of the necessary materials/resources, which will provide the opportunity for a student starting at a specified level of knowledge and skill to attain mastery of the chosen Standard (English Language Arts and Math)/Performance Objective (Science).

Partner or Management Company—Any number of organizations that contract with or have a governance relationship with the entity to provide comprehensive services. For the purposes of a request:

- A Management Company has a governance relationship with the Charter school in which the board has members that are members or employees of the Management Company, and/or the Management Company has executive authority over the Charter school leader or board, including the power to appoint board members and/or close a school operated by the board.
- A Partner an organization that contractually provides operations and management to the Charter school, but the Charter school board chooses the affiliation and is independent of the Partner.

Fiscal Year—The twelve month period that begins on July 1st and ends on June 30th.

Governing Body—The body responsible for the policy decisions of the school, as described in NMSA § 22-8B-4.

Instruction—The methodology used by teachers to present curriculum to students.

Rigor—An expectation set by the New Mexico Common Core State Standards and New Mexico Content Standards that includes a level of conceptual understanding, procedural skill and fluency, and application the student must master at that grade level.

Target Area—The anticipated area in which the school intends to operate.

Target Population—The anticipated student population of the school.

B. *Forms*

- Affidavit, Disclosure and Consent for Background and Credit Check
- Enrollment Matrix
- Occupancy Compliance Assurance and Understanding
- Staffing Chart

PROPOSED DRAFT

New Mexico Public Education Commission
Affidavit and Disclosure

Complete this form for each new Head Administrator or Governing Body Member listed in the request. Duplicate as needed and print each form separately. Have each form signed and dated by the new Head Administrator or Governing Body Member and notarized.

Charter School:_____ **Name:**_____

Street Address:_____

City:_____ **State:**_____ **Zip:**_____

Phone:_____ **Email address:**_____

(For Head Administrators Only) With my signature below, I confirm that I have appropriate licensure or that I meet the requirements to obtain administrative licensure and that I have submitted an application to obtain an Administrative License. Further, I confirm that I have completed a background check that has been cleared by the school before beginning employment with this employer. _____initials

Please check the appropriate answer to each question below.

1. Have you ever been convicted of or pled "no contest" for any violation of law other than minor traffic offenses? If either event has occurred, you must answer YES. If the conviction has been set aside, the charges must be disclosed. Please give details on a separate signed, notarized and dated sheet.	**Yes** ❏ **No** ❏
2. Have you ever been convicted of, admitted committing, or are you awaiting trial on any of the following criminal offenses in this state or similar offenses in another jurisdiction: (1) Sexual abuse of a minor, (2) Incest, (3) First or second degree murder, (4) Kidnapping, (5) Arson, (6) Sexual assault, (7) Sexual exploitation of a minor, (8) Contributing to the delinquency of a minor, (9) Commercial sexual exploitation of a minor, (10) Felony offenses involving sale, distribution or transportation of, offer to sell, transport or distribute marijuana or dangerous or narcotic drugs, (11) Felony offenses involving the possession or use of marijuana or dangerous or narcotic drugs, (12) Misdemeanor offenses involving the possession or use of marijuana or dangerous drugs, (13) Burglary in the first degree, (14) Burglary in the second or third degree, (15) Aggravated or armed robbery, (16) Robbery, (17) A dangerous crime against children, (18) Child abuse, (19) Sexual conduct with a minor, (20) Molestation of a child, (21) Manslaughter, (22) Aggravated assault, (23) Assault, or (24) Exploitation of minors involving drug offenses? If YES, submit certified court record and details of incident(s), signed, notarized and dated.	**Yes** ❏ **No** ❏
3. Have you ever been convicted of, admitted committing, or are you awaiting trial on any financial crimes? If YES, submit certified court record and details of incident(s), signed, notarized and dated.	**Yes** ❏ **No** ❏

I DO SOLEMNLY SWEAR OR AFFIRM THAT THE FOREGOING INFORMATION IS TRUE AND CORRECT TO THE BEST OF MY KNOWLEDGE. FURTHERMORE, SHOULD ANY PART OF THE INFORMATION HEREIN PROVIDED PROVE TO BE FALSE, I RECOGNIZE THAT IT SHALL BE JUST CAUSE FOR THE PUBLIC EDUCATION COMMISSION TO DENY THE REQUEST SUBMITTED BY THE ABOVE LISTED CHARTER SCHOOL LEADER AND/OR BOARD MEMBER(S).

Signature _____

Notary: Subscribed and sworn before me this _____ day of_____Year _____

County of _____ State of _____

Notary Public Signature_____ My Commission Expires _____

Disclosure of this information is voluntary and is requested by the Public Education Commission pursuant to its legislative authorization under NMSA § 22-8B-5.3. No statute or other authority requires that you disclose this information. Failure to complete the disclosure may, however, result in a denial of your request.

New Mexico Public Education Commission

Enrollment Matrix

Complete the table to provide the current and target enrollment, indicating the proposed timeline for implementing the request.

Directions*:

- In each box under the "Number of Students" columns, identify the number of students served per grade for the current and upcoming three fiscal years.
- In the "Total Enrollment" row, provide the total enrollment for each fiscal year.

School Name:				
	Number of Students			
Grade Level	Current—FY__	Target—FY__	Target—FY__	Target—FY__
Kindergarten				
1st				
2nd				
3rd				
4th				
5th				
6th				
7th				
8th				
9th				
10th				
11th				
12th				
Total Enrollment				

*To view an example of a completed Enrollment Matrix, review page 11 of The Guide to Amending a Charter.

New Mexico Public Education Commission
Staffing Chart

Complete the table to provide the current and anticipated staffing for the school(s) operated by the Charter school board. Include staff members needed if the request is granted.

Directions*:

- In each box under the "Number of Staff Members" columns, identify the number of staff members for each position/category for the current and upcoming three fiscal years.

School Name:				
	Number of Staff Members			
Position	Current—FY___	Anticipated—FY___	Anticipated—FY___	Anticipated—FY___
Administration				
Teachers/Instructional Staff				
Kindergarten				
1st				
2nd				
3rd				
4th				
5th				
6th				
7th				
8th				
9th				
10th				
11th				
12th				
Specialty Staff (Music, Art, PE, etc.)				
Special Education				
Paraprofessional				
Additional Staff				
List title:				
List title: _____				
List title: _____				
List title: _____				
Total Number of Staff Members				

*To view an example of a completed Staffing Chart, review page 15 of The Guide to Amending a Charter.

Leadership Staffing Chart

Complete the table below to provide current and anticipated leadership for the school(s) operated by the Charter school board.

Directions:

- In the "Title" column, list the title of each leadership position at the school. Consider all individuals who are part of the leadership team (e.g. principal, instructional coach, lead teacher, etc.).
- In the "Current" and "Anticipated" columns, list the **names** of the individuals that will hold each of the leadership positions during the current and upcoming three fiscal years. If an existing staff member will not hold the position in the projected year, write "New Hire" or "TBD" (to be determined) in the box for that position.

School Name:				
	Leadership Team			
Title	Current—FY__	Anticipated—FY__	Anticipated—FY__	Anticipated—FY__

Additional Educational Program for New School Population Amendment Request

Purpose

The *Additional Educational Program for New School Population Amendment Request* is used to add an additional or different educational program to the charter contract, which will result in a new population of students (beyond the currently enrolled students) being served in a program that is different (different hours/schedule, different primary instructional methods) from the primary educational program that the currently enrolled students are served within. The request must be submitted timely so that it may be processed within the timeframe provided in the PEC policy and implemented starting at the beginning of the next fiscal year (consideration at the June meeting is the latest possible consideration for an amendment to become effective in the next fiscal year). **If the fiscal year has started or will start prior to the request being considered by the PEC**, an amendment request will be effective only in the subsequent fiscal year, if it is approved. A change to add an educational program for a new school population is not effective until approved by the PEC.

Determining Eligibility

To determine whether your charter school is eligible to expand (**increase** the educational programs offered) using the Amendment Process, review the academic performance of the school. The expansion process is open to any charter school if the school has:

- Received no lower than a "C" letter grade in any of the past three years;
- Met each of its mission specific goals in each of the last three years;
- Has not had any multi-year repeat findings in any of the past three years;
- Has received an unmodified audit opinion in each of the past three years;
- Is not currently on monthly reporting with the School Budget and Financial Analysis Bureau that has been required for more than 1 year;
- Has not had its board of finance revoked within the last three years; and
- Has maintained at least 75% student retention within and between school years in each of the last three years.

PEC Consideration

A substantively complete amendment request submitted by a charter school that meets the eligibility criteria shall be placed on the agenda of a regular PEC meeting. A finding that the Charter School is not in compliance in one or more operational areas (see page 5 of The Guide) may result in a delay in consideration of the request. The most current academic data will be provided to the PEC for its consideration of the amendment request.

Please note, approval of this request may require negotiation of additional performance goals.

Staff Recommendation

An *Additional Educational Program for New School Population Amendment Request* will receive a staff

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recommendation *for* the expansion if the Charter school's current data and performance demonstrates all of the following criteria.

Charter school has been in operation for three years;
Received no lower than a "C" letter grade in any of the past three years;
Met each of its mission specific goals in each of the last three years;
Has not had its board of finance revoked within the last three years;
Has maintained at least 75% student retention within and between school years in each of the last three years;
The membership reported at the last reporting date is within 85% of current enrollment cap; and
The school has fully addressed the prompts regarding alignment to mission, improving student achievement, and implementation plan.

Instructions for the Request

If you have questions about completing the form or uploading documents, contact the Charter Schools Division by emailing charter.schools@state.nm.us. Work through the form, filling in all required fields and attachments (denoted by "*"). Be sure to save your work, even if you aren't prepared to submit your form, so that you do not lose your data.

Form Fields

Field	Instructions
Grade Levels Served in New Educational Program*	Identify the grades to be served in the additional educational program. This must align with the current grade levels identified in the charter contract or be accompanied by a grade level change amendment request.
Additional Educational Program*	Identify the contract language you would like included that describes the educational program that will be offered, include a description of the curriculum, schedule/hours, instructional methods, and assessment methods.
Effective Date*	Enter the proposed first day of school for the new ~~grade configuration~~program.
Mission*	Identify the school's mission, which must not conflict with the proposed new program.

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Attachments

For further information regarding specific documentation requirements, see pages 6–15 of The Guide and the administrative and substantive completeness requirements starting on page 3 of these instructions.

Curriculum Samples

Attach curriculum samples for each grade level that will be served in the additional educational program, as described in the instructions on the Curriculum Sample Instructions and Template beginning on page 7 of these instructions.

Additional Educational Program for New School Population Amendment Request

Board Minutes*

Attach evidence that the proposed change has been approved by the Charter school board.

Narrative*

Attach a narrative that responds to the following prompts:

☐ Describe the rationale for this request.

☐ Provide a detailed staffing plan consistent with each Staffing Chart submitted with this request. Describe how the staffing (administrative, instructional, and non-instructional), enrollment, and target population needs will be addressed by the following processes:

- o Recruitment;
- o Hiring; and
- o Training.

☐ If changes to staffing are not needed, provide an explanation.

☐ Provide a detailed description of how the Charter school will meet the enrollment targets identified in each Enrollment Matrix submitted. Include the following:

- o A plan for meeting targets;
- o Necessary advertising and/or promotion to meet the targets;
- o Number of returning students; and
- o Anticipated new student enrollment

☐ Describe the proposed additional Educational Program, including the following:

- o Curriculum (which clearly demonstrates alignment to the New Mexico Common Core State Standards and New Mexico Content Standards);
- o Methods of instruction; and
- o Formative and summative assessments.

☐ Explain how the proposed changes to the Educational Program align to the mission documented in the charter or to a mission change amendment request.

☐ Explain how the proposed additional Educational Program will improve student achievement in the target population that will be served by the additional educational program.

☐ Identify the concrete resources, if any, needed for implementation. Consider the curriculum, assessment, and instruction embodied in this request. Provide the rationale for your response. If the response indicates that resources are not needed to implement the request, explain why.

☐ (If the additional program will serve Grades K–8) Present clear criteria for promotion from one grade level to the next, to include the level of proficiency that students must obtain to demonstrate mastery of academic core content.

☐ (If the additional program will serve Grades 9–12) Describe the following:

- o Course offerings;
- o Process and criteria for awarding course credit;
- o Policy on acceptance of transfer credit; and
- o Graduation requirements that identify the number of credits in each content area and electives consistent with State requirements.

Additional Information

Attach each of the following documents:

- Enrollment Matrix
  - Detail the current and targeted number of students served per grade for the subsequent three Fiscal Years both in the primary educational program and the requested additional educational program.
- Staffing Chart
  - Identify the current and anticipated staffing information for the subsequent three Fiscal Years both in the primary educational program and the requested additional educational program.

Administrative Completeness Review

An administratively complete request is submitted by a school that meets all eligibility criteria and includes the following:

☐ Curriculum Samples (Increase only) for each grade in which the Charter school is requesting expansion. See Curriculum Sample Instructions and Template beginning on page 7 of these instructions.

☐ Board Minutes
- Comply with Open Meeting Law
- Board aligns with what is currently on file with PEC/CSD

☐ Narrative, addressing all required prompts

☐ Completed Enrollment Matrix

☐ Completed Staffing Chart

Substantive Completeness Review

The following checklist will be used to determine substantive completeness for this request. Each criterion (if applicable) will either be deemed acceptable or not acceptable.

Evaluation	Criteria
Board Minutes	Board Minutes that: ☐Indicate that the request has been approved by the appropriate board and is consistent with the submitted form
Rationale	Description includes the following: ☐Rationale for additional educational program; and ☐Rationale is consistent with information contained in all applicable narrative prompt responses and accompanying attachments.
Staffing Chart	☐Completed Staffing Chart is provided for the school's primary educational program and the additional proposed educational program ☐Staffing Chart is consistent with information contained in all applicable narrative prompt responses and accompanying attachments.

Additional Educational Program for New School Population Amendment Request

Staffing Plan	☐Plan describes changes to administrative, instructional, and non-instructional staff in the Staffing Chart.
	
	☐Staffing, enrollment, and target population needs are addressed by the following processes:
	
	    ☐Recruitment;
	
	    ☐Hiring; and
	
	    ☐Training.
	
	☐If no changes to staffing, the plan describes why there are no needed changes.
	
	☐Staffing Plan is consistent with the information contained in all applicable narrative prompt responses and accompanying attachments.

Enrollment Matrix	☐An Enrollment Matrix is completed for the school's primary educational program and the additional proposed educational program. ☐Each Enrollment Matrix is consistent with information contained in all applicable narrative prompts and accompanying attachments.

Enrollment Target	Description for each Enrollment Matrix includes the following:
	
	    ☐ A plan for meeting targets;
	
	    ☐ Necessary advertising and/or promotion to meet the targets;
	
	    ☐ Number of returning students
	
	    ☐ Anticipated new student enrollment
	
	☐Enrollment narrative is consistent with information contained in all applicable narrative prompts and accompanying attachments.

Additional Educational Program (Narrative)	Description includes the following:
	
	    ☐ Curriculum (which clearly demonstrates alignment to the New Mexico Common Core State Standards and New Mexico Content Standards)
	
	    ☐Methods of instruction
	
	    ☐Formative and summative assessments
	
	☐If any of the three areas are not being changed, an explanation of how this area will remain consistent with the new Educational Program is included.
	
	☐Described changes are consistent with information contained in all applicable narrative prompt responses and accompanying attachments.

Alignment to Mission (Narrative)	☐Explanation of how the proposed changes align to the mission documented in the charter. ☐The proposed Educational Program is consistent with information contained in all applicable documents on file with PEC/CSD. If not, appropriate amendments have been filed to reconcile this misalignment. ☐Described alignment is consistent with information contained in all applicable narrative prompt responses and accompanying attachments.

Additional Educational Program for New School Population Amendment Request

Improved Pupil Achievement (Narrative)	☐Explanation of how the proposed changes improve student achievement in the target population. ☐Explanation is consistent with information contained in all applicable narrative prompt responses and accompanying attachments.
Resources (Narrative—Increase Only)	Concrete resources are identified for the following areas: ☐Curriculum; and/or ☐Assessment; and/or ☐Instruction. ☐Rationale includes why these resources are needed, or why additional resources are not needed to implement the request. ☐Identified resources are consistent with information contained in all applicable narrative prompts and accompanying attachments.
Clear Criteria for Promotion (Narrative—Grades K–8)	☐Clear criteria for promotion from one grade level to the next ☐Level of proficiency students must obtain to demonstrate mastery of academic core content.
Courses (Narrative—Grades 9–12)	Narrative describes the following: ☐Course Offerings; ☐Process and criteria for awarding course credit; ☐Policy on acceptance of transfer credit; and ☐Graduation requirements that identify the number of credits in each content area and electives consistent with State requirements.
Curriculum Samples (Increase Only)	See Criteria for Substantive Completeness in the Curriculum Sample Instructions and Template on ==page 10 of these instructions.==

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Curriculum Sample Instructions and Template

Who needs to use this form?
All schools seeking to add an additional or different educational program to the charter contract, which will result in a new population of students (beyond the currently enrolled students) being served in a program that is different (different hours/schedule, different primary instructional methods) from the primary educational program that the currently enrolled students are served within.

Why?
Curriculum samples provide a representation of an Educational Program aligned to the New Mexico Common Core State Standards and the New Mexico Content Standards and to the methods of instruction described in the charter contract, and as amended. The curriculum samples allow the Charter school to demonstrate its capacity to develop a curriculum aligned to these standards and designed to improve pupil academic achievement.

Directions

For each grade level being served in the added educational program, provide curriculum samples for Reading, Writing, and Math using the Curriculum Sample Template. Reading and Writing standards may be addressed in a single English Language Arts (ELA) curriculum sample. If requesting 4th, 7th, and/or 11th grade, provide a Science curriculum sample.

How many pages can a curriculum sample have?
Each curriculum sample addressing a single content area may not exceed 8 pages. If the Reading and Writing curriculum samples for a grade level are submitted as a single ELA curriculum sample, the ELA curriculum sample may not exceed 12 pages. The 8 page limitation (or 12 limitation for an integrated ELA sample) includes the completed curriculum sample template fields, summative assessment items, and scoring information included for review.

Which standards may be used?
Each curriculum sample must address at least one standard from a content area (Reading, Writing, Math, or Science) for the grade level requested. If more than one standard is addressed in a curriculum sample, indicate one standard that is instructed and assessed to mastery to be **the focus of review** by putting **(M)** before the standard number.

> **Reading**—Each Reading/ELA curriculum sample must identify as the focus of review one standard from the Reading strand (either Reading for Literature or Reading for Informational Text), **not** to include RL.10 or RI.10, OR one of the additional 15% of state-specific standards in ELA which focus on cultural responsiveness.

> **Writing**—Each Writing/ELA curriculum sample must identify as the focus of review one standard from the Writing strand (Text Types and Purposes only—**W.1, W.2, or W.3**) OR one of the additional 15% of state-specific standards in ELA which focus on cultural responsiveness.

> **Mathematics**—Each Mathematics curriculum sample must identify one standard from Mathematics to be the focus of review, along with the Standard(s) for Mathematical Practice addressed by the instructional strategies and student activities in the curriculum sample. Standards for Mathematical Practice may not be the focus of review, but should be identified by number when addressed in the instructional strategies and student activities. If any high school grade (9–12) is to be served in the added educational program, the Charter school will provide four curriculum samples representing the four State required high school courses in Mathematics (Algebra, Geometry, Algebra II or its equivalent, and an additional course with significant math content).

Science—A Science curriculum sample must be submitted for charters requesting addition of 4th, 7th, and/or 11th grade. Each Science curriculum sample must identify one performance standard (PS) from a Science strand (Strands 2–3 only). Strand 1 (Scientific thinking and practice) may not be the focus of review, but should be identified by number when addressed in the instructional strategies and student activities.

What about standards with several components?

Each curriculum sample must provide instruction and student activities sufficient to allow a student the opportunity to master the standard identified for review, with assessment items and scoring sufficient to allow that student to clearly demonstrate mastery. Certain standards include multiple components that describe an amount of content and/or skill knowledge that might be difficult to fully address within the page limitations described above.

If the standard has **two or fewer components** identified by lower-case letter (e.g. 3.NF.2 below), the sample must address the **complete** standard including the **overall broad standard description** (double underlined below) and **all components**.

(**M**) 3.NF.2:	Understand a fraction as a number on the number line; represent fractions on a number line diagram.
a.	Represent a fraction 1/b on a number line diagram by defining the interval from 0 to 1 as the whole and partitioning it into b equal parts. Recognize that each part has size 1/b and that the endpoint of the part based at 0 locates the number 1/b on the number line.
b.	Represent the fraction a/b on a number line by marking off a lengths 1/b from 0. Recognize the resulting interval has size a/b and that its endpoint locates the number a/b on the number line.

If the standard includes **more than two components** identified by lower-case letter (e.g. 4.W.1 below), the Charter school is required to address the **overall broad standard description** (double underlined below) and **not fewer than two components** (e.g. 4.W.1, b. and d., underlined below). The components identified for review must address grade-level rigor (see **What is rigor?** below).

(**M**) 4.W.1	Write opinion pieces on topics or texts, supporting a point of view with reasons and information.
a.	Introduce a topic or text clearly, state an opinion, and create an organizational structure in which related ideas are grouped to support the writer's purpose.
b.	(**M**) Provide reasons that are supported by facts and details.
c.	Link opinion and reasons using words and phrases (e.g., for instance, in order to, in addition).
d.	(**M**) Provide a concluding statement or section related to the opinion presented.

What is rigor?

For the **Reading and Writing** curriculum samples, the requirements include addressing the grade-level rigor defined by the listed standard. For the purposes of this request, **grade-level rigor** is the expectation set by New Mexico's Common Core State Standards and New Mexico's Content Standards that includes a level of content and/or skills the student must master at that grade level. The increased rigor at each grade level can be identified by the changes in the standard description from the same standard at the prior grade level.

For the **Mathematics** curriculum samples, the requirements include addressing the grade-level rigor defined by the listed standard. For the purposes of this request, **grade-level rigor** is the expectation set by New Mexico's Common Core State Standards and New Mexico's Content Standards that includes a level of conceptual understanding, procedural skill and fluency, and application the student must master at that grade level, as defined by the standard description.

Administrative Completeness Checklist

An administratively complete curriculum sample includes the following:

☐	**Page Limits** • Each curriculum sample must be no more than **8 pages total**. The page limit increases to 12 pages total when combining Reading and Writing into one integrated ELA curriculum sample.
☐	Template • The attached Curriculum Sample Template must be used for all curriculum sample submissions.
☐	Fonts • Fonts must be no less than **10 point**.
☐	Grade Level • The curriculum sample must identify the grade level of that sample.
☐	Content Area • The curriculum sample must identify the content area of that sample.
☐	Course Title (if requesting any grade(s) between 9–12) • The course title must be provided.
☐	Alignment to Educational Program • Describe how the instructional methods found in the lesson(s) align to the Educational Program described in the charter contract and as amended.
☐	Standard identified to be the focus of review • Include Standard number. • If lesson(s) address(es) more than one standard or standard includes multiple components, refer to **What standards may be used?** or **What about standards with several components**? above. • The focus of review is designated with the bolded **(M)**. • **Reading**: one standard from the Reading strand (either Reading for Literature or Reading for Informational Text), **not** to include RL.10 or RI.10, OR one of the additional 15% of state-specific standards in ELA which focus on cultural responsiveness. • **Writing**: one standard from the Writing strand (Text Types and Purposes only—**W.1, W.2, or W.3**), OR one of the additional 15% of state-specific standards in ELA which focus on cultural responsiveness. • **Mathematics**: one standard from Mathematics to be the focus of review, along with the Standard(s) for Mathematical Practice addressed by the instructional strategies and student activities in the curriculum sample. Standards for Mathematical Practice may not be the focus of review, but should be identified by number when addressed in the instructional strategies and student activities. If any high school grade (9–12) is to be served in the added educational program, the Charter school will provide four curriculum samples representing the four State required high school courses in Mathematics (Algebra, Geometry, Algebra II or its equivalent, and an additional course with significant math content).
☐	Full description of standard identified as the focus of review
☐	List of Materials and Resources required
☐	Description of Instructional Strategies and Student Activities by lesson
☐	A minimum of three Summative Assessment Items for each of the following content areas—Reading, Writing, Mathematics, and Science (if applicable)
☐	The answer key or scoring rubric (whichever applicable) for each Summative Assessment Item including point values and how points will be awarded
☐	An acceptable score indicating mastery of the standard for review

Substantive Completeness Checklist

A substantively complete curriculum sample template will do the following:

☐	Instructional Strategies • Describe the Instructional Strategies, lesson by lesson, that would clearly provide students with opportunities to engage in the grade-level rigor defined in the standard identified as the focus of review.
☐	Student Activities • Describe the Student Activities, lesson by lesson, that would clearly provide students with opportunities to engage in the grade-level rigor, defined in the standard identified as the focus of review.
☐	Summative Assessment Items • Provide an opportunity for students to complete the Summative Assessment Items. These Summative Assessment Items are assessed independently and are separate from instruction and guided or independent practice.
☐	Summative Assessment Items • Provide at least three Summative Assessment Items for each content area—Reading, Writing, Mathematics, and Science (if applicable) • Answer key(s) and/or scoring rubric(s), clearly describing, for each Summative Assessment Item, components to be scored and how points will be awarded, that taken together accurately measure student mastery of the application of the content and/or skills as defined by the grade-level rigor in the standard identified for review. • Mastery of the application of the content and/or skills as defined by the grade-level rigor in the standard identified for review is clearly demonstrated by an identified acceptable score or combination of identified acceptable scores.
☐	Educational Program • Provide Instruction, Student Activities, and Summative Assessment Items that are clearly consistent with Educational Program outlined in the charter contract and as amended.

Curriculum Sample Template—8 Pages Max. (12 pages for integrated ELA sample). **Instruction Pages above should be deleted before submission.**

		Content Area	
Grade Level		**Content Area**	
Course Title (grades 9–12 Only)			
Alignment to Educational Program *Describe how the methods of instruction found in this sequence of lessons align to the Educational Program described in the charter contract and as amended.*			
Standard Number and Description *The standard number and description (see instructions) of the standard being instructed and assessed to mastery in the curriculum sample. If more than one Standard is listed for a content area,* **one is clearly identified as the focus of review** *by having* **(M)** *before the standard number.*			
Materials/Resources Needed *List all items the teacher and students will need for the entire sequence of instruction (excluding common consumables).*			

Lesson (add as needed)	Instructional Strategies—*Describe the Instructional Strategies, lesson by lesson, that would clearly provide students with opportunities to engage in the grade-level rigor defined by the Standard identified as the focus of review.*	Student Activities—*Describe the Student Activities, lesson by lesson, that would clearly provide students with opportunities to engage in or master the grade-level rigor defined by the standard identified as the focus of review.* *Indicate alignment of Student Activities to the standard/component identified as the focus of review and specific Standard(s) of Mathematical Practice.*
1		
2		
3		
4		
S.A.	*Provide an opportunity for students to complete the Summative Assessment Items. These Summative Assessment Items are assessed independently and are separate from instruction and guided or independent practice. In the Student Activities column, describe the Summative Assessment Items that will allow students to demonstrate mastery of the rigor of the standard/components identified as the focus of review, and the context in which the items will be administered.*	

Summative Assessment Items and Scoring:

Provide below, at least three Summative Assessment Items for each content area, with answer key(s) and/or scoring rubric(s), clearly describing, for each Summative Assessment Item, components to be scored and how points will be awarded, that together accurately measure student mastery of the application of the content and/or skills as defined by the grade-level rigor in the standard identified for review. Mastery of the application of the content and/or skills as defined by the grade-level rigor in the standard identified for review is clearly demonstrated by an identified acceptable score or combination of identified acceptable scores.

Charter Mission Amendment Request

Purpose

The *Charter Mission Amendment Request* is used to change the mission of a charter.

Determining Eligibility

Any Charter school is eligible to submit a *Charter Mission Amendment Request*. However, a school may not amend their mission in a manner that would change the essence of the mission. Additions and technical modifications are allowed.

PEC Consideration

A substantively complete amendment request submitted by a Charter school shall be placed on the <u>consent</u> agenda of a regular PEC meeting. A finding that the Charter school is not in compliance in one or more operational areas (see page 5 of The Guide) may result in a delay in consideration of the request.

Instructions for the Request

If you have questions about completing the form or uploading documents, contact the Charter Schools Division by emailing charter.schools@state.nm.us. Work through the form, filling in all required fields and attachments (denoted by "*"). Be sure to save your work, even if you aren't prepared to submit your form, so that you do not lose your data.

Form Fields

Field	Instructions
Change From	Identify the current charter mission statement.
Change To*	Provide the exact text of the new charter mission statement.

Attachments

For further information regarding specific documentation requirements, see pages 6–15 of the Guide and the substantive completeness requirements found on page 2.

Board Minutes*
Attach evidence that the proposed change has been approved by the Charter school board.

Administrative Completeness Review

An administratively complete request includes the following:

☐   Board Minutes
- Comply with Open Meeting Law
- Board aligns with what is currently on file with PEC/CSD

Substantive Completeness Review

The following checklist will be used to determine substantive completeness for this request. Each criterion (if applicable) will either be deemed acceptable or not acceptable.

Review	Criteria
Board Minutes	Board Minutes that: ☐Indicate that the request has been approved by the appropriate board and is consistent with the submitted form.
Mission Statement	☐The proposed mission, as stated, aligns with the Charter school's Educational Program on file in the charter contract and does not change the essence of the mission.

Enrollment Cap Amendment Request

Purpose

The *Enrollment Cap Amendment Request* is used to increase or decrease the number of students the school is approved to serve under its contract. The request must be submitted timely so that it may be processed within the timeframe provided in the PEC policy and implemented starting at the beginning of the next fiscal year (consideration at the June meeting is the latest possible consideration for an amendment to become effective in the next fiscal year). If the fiscal year has started or will start prior to the request being considered by the PEC, an amendment request will be effective only in the subsequent fiscal year, if it is approved. An enrollment cap is not effective until approved by the PEC. Enrollment cap requests must be submitted for approval at least two months prior to the school's enrollment period.

Determining Eligibility

To determine whether your charter is eligible to expand (**increase** the Enrollment Cap) using the Amendment Process, review the academic performance of the school. The expansion process is open to any charter school if the school has:

- Received no lower than a "C" letter grade in any of the past three years;
- Met each of its mission specific goals in each of the last three years;
- Has not had any multi-year repeat findings in any of the past three years;
- Has received an unmodified audit opinion in each of the past three years;
- Is not currently on monthly reporting with the School Budget and Financial Analysis Bureau that has been required for more than 1 year;
- Has not had its board of finance revoked within the last three years; and
- Has maintained at least 75% student retention within and between school years in each of the last three years.

An eligible charter school may submit an Enrollment Cap Amendment Request for up to three fiscal years of projected student enrollment.

Any charter school is eligible to submit an Enrollment Cap Amendment Request to **decrease** the number of students served.

PEC Consideration

A substantively complete amendment request submitted by a charter school that meets the eligibility criteria shall be placed on the agenda of a regular PEC meeting. Requests to decrease the enrollment cap will be placed on the consent agenda of a regular PEC meeting. A finding that the Charter School is not in compliance in one or more operational areas (see page 5 of The Guide) may result in a delay in consideration of the request. The most current academic data will be provided to the PEC for its consideration of the amendment request.

Staff Recommendation

An *Enrollment Cap Amendment Request* for an increase in the enrollment cap will receive a staff recommendation *for* the expansion if the Charter school's current data and performance demonstrates all of the following criteria.

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Enrollment Cap Amendment Request
Charter school has been in operation for three years;
Received no lower than a "C" letter grade in any of the past three years;
Met each of its mission specific goals in each of the last three years;
Has not had any multi-year repeat findings in any of the past three years;
Has received an unmodified audit opinion in each of the past three years;
Is not currently on monthly reporting with the School Budget and Financial Analysis Bureau that has been required for more than 1 year;
Has not had its board of finance revoked within the last three years;
Has maintained at least 75% student retention within and between school years in each of the last three years;
Previous grade level cohort(s) is/are at capacity and/or could fill enrollment for new grade(s) requested;
The membership reported at the last reporting date is within 85% of current enrollment cap;
The school has fully addressed the prompts regarding staffing, curriculum, and facility submissions to support the expansion;
The school performs at or above the average performance of a majority of schools within the school's feeder pattern based on location.

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Instructions for the Request

If you have questions about completing the form or uploading documents, contact the Charter Schools Division by emailing charter.schools@state.nm.us. Work through the form, filling in all required fields and uploads (denoted by "*"). Follow the instructions for each upload field. Be sure to save your work, even if you aren't prepared to submit your form, so that you do not lose your data.

Form Fields

Field	Instructions
From	Identify the *Current Enrollment Cap approved for the charter contract*.
To*	Enter the Enrollment Cap being requested, ensuring it is supported by the documented capacity of the facility/facilities identified.

Attachments

For further information regarding specific documentation requirements, see pages 6–15 of The Guide and the substantive completeness requirements starting on page 3 of these instructions.

Board Minutes*
Attach evidence that the proposed change has been approved by the Charter school board.

Occupancy Documentation (Increase Only)

For the proposed facility, clearly label and provide the following documents:

- Documentation of the capacity load of the facility to document capacity that can sustain projected growth in enrollment based on grade level growth. Hand-drawn images will not be accepted.

Narrative*

Upload a narrative that responds to the following prompts:

☐ (Decrease and Increase) Describe the rationale for this request.

☐ (Increase Only) Provide a detailed staffing plan consistent with each Staffing Chart submitted with this request. Describe how the staffing (administrative, instructional, and non-instructional), enrollment, and target population needs will be addressed by the following processes:

- Recruitment;
- Hiring; and
- Training.

☐ If changes to staffing are not needed, provide an explanation.

☐ (Increase Only) Provide a detailed description of how the Charter school will meet the enrollment targets identified in each Enrollment Matrix submitted. Include the following:

- A plan for meeting targets;
- Necessary advertising and/or promotion to meet the targets;
- Number of returning students; and
- Anticipated new student enrollment.

☐ (Increase Only) Identify the concrete resources, if any, needed for implementation. Consider the changes needed to curriculum, assessment, and instruction to implement this request. Provide the rationale for your response. If the response indicates that resources are not needed to implement the request, explain why.

Additional Information

Upload each of the following documents:

- (Increase Only) Enrollment Matrix
  - o Detail the current and targeted number of students served per grade for the subsequent three Fiscal Years.
- (Increase Only) Staffing Chart
  - o Identify the current and anticipated staffing information for the subsequent three Fiscal Years.

Administrative Completeness Review

An administratively complete request is submitted by a school that meets all eligibility criteria and includes the following:

☐ Board Minutes
- Comply with Open Meeting Law
- Board aligns with what is currently on file with PEC/CSD

☐ Occupancy Documentation
- Certification of capacity

☐ Narrative, addressing all prompts

☐ Completed Enrollment Matrix for each school operated by the Charter school

☐ Completed Staffing Chart for each school operated by the Charter school

Substantive Completeness Review

The following checklist will be used to determine substantive completeness for this request. Each criterion (if applicable) will either be deemed acceptable or not acceptable.

Review	Criteria
Board Minutes	Board Minutes that: ☐Indicate that the request has been approved by the appropriate board and is consistent with the submitted form
Occupancy Documentation (Increase Only)	☐ Documentation to demonstrate sufficient capacity for requested enrollment cap.
Rationale (Narrative)	Description includes the following: ☐Rationale for increase or decrease in enrollment cap; and ☐Rationale is consistent with information contained in all applicable narrative prompt responses and accompanying attachments.
Staffing Chart (Increase Only)	☐Completed Staffing Chart is provided for the school ☐Staffing Chart includes a leadership section ☐Staffing Chart is consistent with information contained in all applicable narrative prompt responses and accompanying attachments.
Staffing Plan (Narrative—Increase Only)	☐Plan describes changes to instructional, non-instructional, and administrative staff in the Staffing Chart(s). ☐Staffing, enrollment, and target population needs are addressed by the following processes: 　　☐Recruitment; 　　☐Hiring; and 　　☐Training. ☐If no changes to staffing, the plan describes why there are no needed changes. ☐Staffing Plan is consistent with the information contained in all applicable narrative prompt responses and accompanying attachments.

Enrollment Cap Amendment Request	
Enrollment Matrix (Increase Only)	☐An Enrollment Matrix is completed for current and subsequent three Fiscal Years for each school operated by the Charter school. ☐ Each Enrollment Matrix is consistent with information contained in all applicable narrative prompts and accompanying attachments.

Enrollment Targets (Narrative— Increase Only)	☐ Description for each Enrollment Matrix includes the following:
	
	    ☐ A plan for meeting targets;
	
	    ☐ Necessary advertising and/or promotion to meet the targets;
	
	    ☐ Number of returning students; and
	
	    ☐ Anticipated new student enrollment.
	
	☐ Enrollment narrative is consistent with information contained in all applicable narrative prompts and accompanying attachments.

Resources (Narrative— Increase Only)	Concrete resources are identified for the following areas: ☐Curriculum; and/or ☐Assessment; and/or ☐Instruction. ☐Rationale includes why these resources are needed, or why additional resources are not needed to implement the request. ☐Identified resources are consistent with information contained in all applicable narrative prompts and accompanying attachments.

Grade Level Change to Contract Amendment Request

Purpose

The *Grade Level Change to Charter Amendment Request* is used to increase or decrease the grade levels the school is approved to serve under its contract. The request must be submitted timely so that it may be processed within the timeframe provided in the PEC policy and implemented starting at the beginning of the next fiscal year (consideration at the June meeting is the latest possible consideration for an amendment to become effective in the next fiscal year). **If the fiscal year has started or will start prior to the request being considered by the PEC**, an amendment request will be effective only in the subsequent fiscal year, if it is approved. A change in grades served is not effective until approved by the PEC.

Determining Eligibility

To determine whether your charter school is eligible to expand (**increase** grades served) using the Amendment Process, review the academic performance of the school. The expansion process is open to any charter school if the school has:

- Received no lower than a "C" letter grade in any of the past three years;
- Met each of its mission specific goals in each of the last three years;
- Has not had any multi-year repeat findings in any of the past three years;
- Has received an unmodified audit opinion in each of the past three years;
- Is not currently on monthly reporting with the School Budget and Financial Analysis Bureau that has been required for more than 1 year;
- Has not had its board of finance revoked within the last three years; and
- Has maintained at least 75% student retention within and between school years in each of the last three years.

Any charter school is eligible to submit a Grade Level Change to Charter Amendment Request to **decrease** the grade levels the Charter school is approved to serve.

PEC Consideration

A substantively complete amendment request submitted by a charter school that meets the eligibility criteria shall be placed on the agenda of a regular PEC meeting. Requests to decrease the grade levels served will be placed on the consent agenda of a regular PEC meeting. A finding that the Charter School is not in compliance in one or more operational areas (see page 5 of The Guide) may result in a delay in consideration of the request. The most current academic data will be provided to the PEC for its consideration of the amendment request.

Staff Recommendation

A *Grade Level Change to Charter Amendment Request* for an increase in grades served will receive a staff recommendation *for* the expansion if the Charter school's current data and performance demonstrates all of the following criteria.

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Charter school has been in operation for three years;
Received no lower than a "C" letter grade in any of the past three years;
Met each of its mission specific goals in each of the last three years;
Has not had any multi-year repeat findings in any of the past three years;
Has received an unmodified audit opinion in each of the past three years;
Is not currently on monthly reporting with the School Budget and Financial Analysis Bureau that has been required for more than 1 year;
Has not had its board of finance revoked within the last three years;
Has maintained at least 75% student retention within and between school years in each of the last three years;
Previous grade level cohort(s) is/are at capacity and/or could fill enrollment for new grade(s) requested;
The membership reported at the last reporting date is within 85% of current enrollment cap;
The school has fully addressed the prompts regarding staffing, curriculum, and facility submissions to support the expansion;
The school performs at or above the average performance of a majority of schools within the school's feeder pattern based on location.

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Instructions for the Request

If you have questions about completing the form or uploading documents, contact the Charter Schools Division by emailing charter.schools@state.nm.us. Work through the form, filling in all required fields and attachments (denoted by "*"). Be sure to save your work, even if you aren't prepared to submit your form, so that you do not lose your data.

Form Fields

Field	Instructions
Current Grade Levels Served	Identify the *Current Grade Levels Served* accurately based on the grade levels approved for the charter contract and currently served.
New Grade Levels Served*	Identify the grades to be served after approval of the request. This includes the current grades served, and the new grades that are requested.
Effective Date*	Enter the proposed first day of school for the new grade configuration.

Attachments

For further information regarding specific documentation requirements, see pages 6–15 of The Guide and the administrative and substantive completeness requirements starting on page 3 of these instructions.

Curriculum Samples

Charters in which the school has received an "A" or "B" letter grade in the current year will not be required to

submit curriculum samples.

Charters that have received a "C" or "B" letter grade will be required to provide a complete set of curriculum samples for each grade to be added.

Attach curriculum samples for each grade level being requested, as described in the instructions on the Curriculum Sample Instructions and Template beginning on page 7 of these instructions.

Board Minutes*
Attach evidence that the proposed change has been approved by the Charter school board.

Occupancy Documentation (Increase Only)

For the proposed facility, clearly label and provide the following documents:

- Documentation of the capacity load of the facility to document capacity that can sustain projected growth in enrollment based on grade level growth. Hand-drawn images will not be accepted.

Narrative*
Attach a narrative that responds to the following prompts:

☐ (Decrease and Increase) Describe the rationale for this request.

☐ (Increase Only) Provide a detailed staffing plan consistent with each Staffing Chart submitted with this request. Describe how the staffing (administrative, instructional, and non-instructional), enrollment, and target population needs will be addressed by the following processes:
- o Recruitment;
- o Hiring; and
- o Training.

☐ If changes to staffing are not needed, provide an explanation.

☐ (Increase Only) Provide a detailed description of how the Charter school will meet the enrollment targets identified in each Enrollment Matrix submitted. Include the following:
- o A plan for meeting targets;
- o Necessary advertising and/or promotion to meet the targets;
- o Number of returning students; and
- o Anticipated new student enrollment

☐ (Increase Only) Identify the concrete resources, if any, needed for implementation. Consider the changes needed to curriculum, assessment, and instruction to implement this request. Provide the rationale for your response. If the response indicates that resources are not needed to implement the request, explain why.

☐ (Adding Grades K–8 Only) Present clear criteria for promotion from one grade level to the next, to include the level of proficiency that students must obtain to demonstrate mastery of academic core content.

☐ (Adding Grades 9–12 Only) Describe the following:
- o Course offerings;
- o Process and criteria for awarding course credit;
- o Policy on acceptance of transfer credit; and

- o Graduation requirements that identify the number of credits in each content area and electives consistent with State requirements.
- ☐ (Decrease Only) Identify the number of students displaced by the decrease in grade levels.
- ☐ (Decrease Only) Describe the plan to communicate the decrease in grades to the school community.
- ☐ (Decrease Only) Describe the plan to provide displaced students assistance with:
  - o Identifying other educational options; and
  - o Enrolling in another school.

Additional Information

Attach each of the following documents:

- (Increase Only) Enrollment Matrix
  - o Detail the current and targeted number of students served per grade for the subsequent three Fiscal Years.
- (Increase Only) Staffing Chart
  - o Identify the current and anticipated staffing information for the subsequent three Fiscal Years.

Administrative Completeness Review

An administratively complete request is submitted by a school that meets all eligibility criteria and includes the following:

- ☐ Curriculum Samples (Increase only) for each grade in which the Charter school is requesting expansion. See Curriculum Sample Instructions and Template beginning on page 7 of these instructions.
- ☐ Board Minutes
  - Comply with Open Meeting Law
  - Board aligns with what is currently on file with PEC/CSD
- ☐ Narrative, addressing all required prompts
- ☐ Completed Enrollment Matrix (Increase only)
- ☐ Completed Staffing Chart (Increase only)

Substantive Completeness Review

The following checklist will be used to determine substantive completeness for this request. Each criterion (if applicable) will either be deemed acceptable or not acceptable.

Evaluation	Criteria
Board Minutes	Board Minutes that: ☐ Indicate that the request has been approved by the appropriate board and is consistent with the submitted form

Rationale (Narrative—Increase and Decrease)	Description includes the following: ☐Rationale for increase or decrease in grade levels; and ☐Rationale is consistent with information contained in all applicable narrative prompt responses and accompanying attachments.
Occupancy Documentation (Increase Only)	☐ Documentation to demonstrate sufficient capacity for requested enrollment cap.
Staffing Chart (Increase Only)	☐Completed Staffing Chart is provided for the school ☐Staffing Chart includes a leadership section ☐Staffing Chart is consistent with information contained in all applicable narrative prompt responses and accompanying attachments.
Staffing Plan (Narrative—Increase Only)	☐Plan describes changes to administrative, instructional, and non-instructional staff in the Staffing Chart. ☐Staffing, enrollment, and target population needs are addressed by the following processes: ☐Recruitment; ☐Hiring; and ☐Training. ☐If no changes to staffing, the plan describes why there are no needed changes. ☐Staffing Plan is consistent with the information contained in all applicable narrative prompt responses and accompanying attachments.
Enrollment Matrix (Increase Only)	☐An Enrollment Matrix is completed for the current and subsequent three Fiscal Years for each school operated by the Charter school. ☐Each Enrollment Matrix is consistent with information contained in all applicable narrative prompts and accompanying attachments.
Enrollment Target (Narrative—Increase Only)	Description for each Enrollment Matrix includes the following: ☐ A plan for meeting targets; ☐ Necessary advertising and/or promotion to meet the targets; ☐ Number of returning students ☐ Anticipated new student enrollment ☐Enrollment narrative is consistent with information contained in all applicable narrative prompts and accompanying attachments.

Resources (Narrative—Increase Only)	Concrete resources are identified for the following areas: ☐Curriculum; and/or ☐Assessment; and/or ☐Instruction. ☐Rationale includes why these resources are needed, or why additional resources are not needed to implement the request. ☐Identified resources are consistent with information contained in all applicable narrative prompts and accompanying attachments.
Clear Criteria for Promotion (Narrative—Adding Grades K–8)	☐Clear criteria for promotion from one grade level to the next ☐Level of proficiency students must obtain to demonstrate mastery of academic core content.
Courses (Narrative—Adding Grades 9–12)	Narrative describes the following: ☐Course Offerings; ☐Process and criteria for awarding course credit; ☐Policy on acceptance of transfer credit; and ☐Graduation requirements that identify the number of credits in each content area and electives consistent with State requirements.
Student Displacement (Narrative—Decrease Only)	☐Narrative identifies the number of students displaced by the decrease in grade levels.
Communication Plan (Narrative—Decrease Only)	☐Narrative includes a description of the Charter school's plan to communicate the decrease in grade levels to the school community.

Assistance for Displaced Students (Narrative—Decrease Only)	Narrative includes a description of how the Charter school will assist displaced students with the following:
	
	    ☐Identifying other options; and
	
	    ☐Enrolling in another school.

Curriculum Samples **(Increase Only)**	See Criteria for Substantive Completeness in the Curriculum Sample Instructions and Template on <mark>page 10 of these instructions.</mark>

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Curriculum Sample Instructions and Template

Who needs to use this form?
Charter schools with a current letter grade of "C".

Why?
Curriculum samples provide a representation of a Educational Program aligned to the New Mexico Common Core State Standards and the New Mexico Content Standards and to the methods of instruction described in the charter contract, and as amended. The curriculum samples allow the Charter school to demonstrate its capacity to develop a curriculum aligned to these standards and designed to improve pupil academic achievement.

Directions

For each grade level being added, provide curriculum samples for Reading, Writing, and Math using the Curriculum Sample Template. Reading and Writing standards may be addressed in a single English Language Arts (ELA) curriculum sample. If requesting 4th, 7th, and/or 11th grade, provide a Science curriculum sample.

How many pages can a curriculum sample have?
Each curriculum sample addressing a single content area may not exceed 8 pages. If the Reading and Writing curriculum samples for a grade level are submitted as a single ELA curriculum sample, the ELA curriculum sample may not exceed 12 pages. The 8 page limitation (or 12 page limitation for an integrated ELA sample) includes the completed curriculum sample template fields, summative assessment items, and scoring information included for review.

Which standards may be used?
Each curriculum sample must address at least one standard from a content area (Reading, Writing, Math, or Science) for the grade level requested. If more than one standard is addressed in a curriculum sample, indicate one standard that is instructed and assessed to mastery to be **the focus of review** by putting **(M)** before the standard number.

Reading—Each Reading/ELA curriculum sample must identify as the focus of review one standard from the Reading strand (either Reading for Literature or Reading for Informational Text), **not** to include RL.10 or RI.10, OR one of the additional 15% of state-specific standards in ELA which focus on cultural responsiveness.

Writing—Each Writing/ELA curriculum sample must identify as the focus of review one standard from the Writing strand (Text Types and Purposes only—**W.1, W.2, or W.3**) OR one of the additional 15% of state-specific standards in ELA which focus on cultural responsiveness.

Mathematics—Each Mathematics curriculum sample must identify one standard from Mathematics to be the focus of review, along with the Standard(s) for Mathematical Practice addressed by the instructional strategies and student activities in the curriculum sample. Standards for Mathematical Practice may not be the focus of review, but should be identified by number when addressed in the instructional strategies and student activities. If any high school grade (9–12) is to be added, the Charter school will provide four curriculum samples representing the four State required high school courses in Mathematics (Algebra, Geometry, Algebra II or its equivalent, and an additional course with significant math content).

Science—A Science curriculum sample must be submitted for charters requesting addition of 4th, 7th, and/or 11th grade. Each Science curriculum sample must identify one performance standard (PS) from a Science strand (Strands 2–3 only). Strand 1 (Scientific thinking and practice) may not be the focus of review, but should be identified by number when addressed in the instructional strategies and student

activities.

What about standards with several components?

Each curriculum sample must provide instruction and student activities sufficient to allow a student the opportunity to master the standard identified for review, with assessment items and scoring sufficient to allow that student to clearly demonstrate mastery. Certain standards include multiple components that describe an amount of content and/or skill knowledge that might be difficult to fully address within the page limitations described above.

If the standard has **two or fewer components** identified by lower-case letter (e.g. 3.NF.2 below), the sample must address the **complete** standard including the **overall broad standard description** (<u>double underlined</u> below) and **all components**.

(**M**) 3.NF.2:	<u>Understand a fraction as a number on the number line; represent fractions on a number line diagram.</u>
a.	Represent a fraction 1/*b* on a number line diagram by defining the interval from 0 to 1 as the whole and partitioning it into *b* equal parts. Recognize that each part has size 1/*b* and that the endpoint of the part based at 0 locates the number 1/*b* on the number line.
b.	Represent the fraction *a/b* on a number line by marking off a lengths 1/*b* from 0. Recognize the resulting interval has size *a/b* and that its endpoint locates the number *a/b* on the number line.

If the standard includes **more than two components** identified by lower-case letter (e.g. 4.W.1 below), the Charter school is required to address the **overall broad standard description** (<u>double underlined</u> below) and **not fewer than two components** (e.g. 4.W.1, b. and d., <u>underlined</u> below). The components identified for review must address grade-level rigor (see **What is rigor?** below).

(**M**) 4.W.1	<u>Write opinion pieces on topics or texts, supporting a point of view with reasons and information.</u>
a.	Introduce a topic or text clearly, state an opinion, and create an organizational structure in which related ideas are grouped to support the writer's purpose.
b.	<u>(**M**) Provide reasons that are supported by facts and details.</u>
c.	Link opinion and reasons using words and phrases (e.g., for instance, in order to, in addition).
d.	<u>(**M**) Provide a concluding statement or section related to the opinion presented.</u>

What is rigor?

For the **Reading and Writing** curriculum samples, the requirements include addressing the grade-level rigor defined by the listed standard. For the purposes of this request, **grade-level rigor** is the expectation set by New Mexico's Common Core State Standards and New Mexico's Content Standards that includes a level of content and/or skills the student must master at that grade level. The increased rigor at each grade level can be identified by the changes in the standard description from the same standard at the prior grade level.

For the **Mathematics** curriculum samples, the requirements include addressing the grade-level rigor defined by the listed standard. For the purposes of this request, **grade-level rigor** is the expectation set by New Mexico's Common Core State Standards and New Mexico's Content Standards that includes a level of conceptual understanding, procedural skill and fluency, and application the student must master at that grade level, as defined by the standard description.

Administrative Completeness Checklist

An administratively complete curriculum sample includes the following:

☐	**Page Limits** • Each curriculum sample must be no more than **8 pages total**. The page limit increases to 12 pages total when combining Reading and Writing into one integrated ELA curriculum sample.
☐	**Template** • The attached Curriculum Sample Template must be used for all curriculum sample submissions.
☐	**Fonts** • Fonts must be no less than **10 point**.
☐	**Grade Level** • The curriculum sample must identify the grade level of that sample.
☐	**Content Area** • The curriculum sample must identify the content area of that sample.
☐	**Course Title (if requesting any grade(s) between 9–12)** • The course title must be provided.
☐	**Alignment to Educational Program** • Describe how the instructional methods found in the lesson(s) align to the Educational Program described in the charter contract and as amended.
☐	**Standard identified to be the focus of review** • Include Standard number. • If lesson(s) address(es) more than one standard or standard includes multiple components, refer to **What standards may be used?** or **What about standards with several components**? above. • The focus of review is designated with the bolded **(M)**. • **Reading**: one standard from the Reading strand (either Reading for Literature or Reading for Informational Text)**, not** to include RL.10 or RI.10, OR one of the additional 15% of state-specific standards in ELA which focus on cultural responsiveness. • **Writing**: one standard from the Writing strand (Text Types and Purposes only—**W.1, W.2, or W.3**), OR one of the additional 15% of state-specific standards in ELA which focus on cultural responsiveness. • **Mathematics**: one standard from Mathematics to be the focus of review, along with the Standard(s) for Mathematical Practice addressed by the instructional strategies and student activities in the curriculum sample. Standards for Mathematical Practice may not be the focus of review, but should be identified by number when addressed in the instructional strategies and student activities. If any high school grade (9–12) is to be added, the Charter school will provide four curriculum samples representing the four State required high school courses in Mathematics (Algebra, Geometry, Algebra II or its equivalent, and an additional course with significant math content).
☐	Full description of standard identified as the focus of review
☐	List of Materials and Resources required
☐	Description of Instructional Strategies and Student Activities by lesson
☐	A minimum of three Summative Assessment Items for each of the following content areas—Reading, Writing, Mathematics, and Science (if applicable)
☐	The answer key or scoring rubric (whichever applicable) for each Summative Assessment Item including point values and how points will be awarded
☐	An acceptable score indicating mastery of the standard for review

Substantive Completeness Checklist

A substantively complete curriculum sample template will do the following:

☐	Instructional Strategies • Describe the Instructional Strategies, lesson by lesson, that would clearly provide students with opportunities to engage in the grade-level rigor defined in the standard identified as the focus of review.
☐	Student Activities • Describe the Student Activities, lesson by lesson, that would clearly provide students with opportunities to engage in the grade-level rigor, defined in the standard identified as the focus of review.
☐	Summative Assessment Items • Provide an opportunity for students to complete the Summative Assessment Items. These Summative Assessment Items are assessed independently and are separate from instruction and guided or independent practice.
☐	Summative Assessment Items • Provide at least three Summative Assessment Items for each content area—Reading, Writing, Mathematics, and Science (if applicable) • Answer key(s) and/or scoring rubric(s), clearly describing, for each Summative Assessment Item, components to be scored and how points will be awarded, that taken together accurately measure student mastery of the application of the content and/or skills as defined by the grade-level rigor in the standard identified for review. • Mastery of the application of the content and/or skills as defined by the grade-level rigor in the standard identified for review is clearly demonstrated by an identified acceptable score or combination of identified acceptable scores.
☐	Educational Program • Provide Instruction, Student Activities, and Summative Assessment Items that are clearly consistent with Educational Program outlined in the charter contract and as amended.

Curriculum Sample Template—8 Pages Max. (12 pages for integrated ELA sample). **Instruction Pages above should be deleted before submission.**

		Content Area	
Grade Level		**Content Area**	
Course Title (grades 9–12 Only)			
Alignment to Educational Program *Describe how the methods of instruction found in this sequence of lessons align to the Educational Program described in the charter contract and as amended.*			
Standard Number and Description *The standard number and description (see instructions) of the standard being instructed and assessed to mastery in the curriculum sample. If more than one Standard is listed for a content area, **one is clearly identified as the focus of review** by having **(M)** before the standard number.*			
Materials/Resources Needed *List all items the teacher and students will need for the entire sequence of instruction (excluding common consumables).*			

Lesson (add as needed)	Instructional Strategies—*Describe the Instructional Strategies, lesson by lesson, that would clearly provide students with opportunities to engage in the grade-level rigor defined by the Standard identified as the focus of review.*	Student Activities—*Describe the Student Activities, lesson by lesson, that would clearly provide students with opportunities to engage in or master the grade-level rigor defined by the standard identified as the focus of review.* *Indicate alignment of Student Activities to the standard/component identified as the focus of review and specific Standard(s) of Mathematical Practice.*
1		
2		
3		
4		
S.A.	*Provide an opportunity for students to complete the Summative Assessment Items. These Summative Assessment Items are assessed independently and are separate from instruction and guided or independent practice. In the Student Activities column, describe the Summative Assessment Items that will allow students to demonstrate mastery of the rigor of the standard/components identified as the focus of review, and the context in which the items will be administered.*	

Summative Assessment Items and Scoring:

Provide below, at least three Summative Assessment Items for each content area, with answer key(s) and/or scoring rubric(s), clearly describing, for each Summative Assessment Item, components to be scored and how points will be awarded, that together accurately measure student mastery of the application of the content and/or skills as defined by the grade-level rigor in the standard identified for review. Mastery of the application of the content and/or skills as defined by the grade-level rigor in the standard identified for review is clearly demonstrated by an identified acceptable score or combination of identified acceptable scores.

Permanent Change to Overall Instructional Hours Amendment Request

Purpose

The *Permanent Change to Overall Instructional Hours Amendment Request* is used to increase or decrease the number of overall annual instructional hours for one or more educational programs provided by the Charter School. This is only used for a permanent change to the charter contract; a notification is used to identify when the contracted instructional hours will not be met in a specific fiscal year due to unforeseen circumstances (e.g. snow, power outage, roof collapse).

Determining Eligibility

Any Charter School may submit a *Permanent Change to Overall Instructional Hours Amendment Request*. However, the request will not be approved to decrease contractual hours for any educational program offered by the school below the overall minimum annual instructional hours required in NMSA § 22-2-8.1

PEC Consideration

A substantively complete amendment request submitted by a Charter School will be placed on the agenda of a regular Board meeting. Requests to increase the overall instructional hours will be placed on the consent agenda of a regular PEC meeting. A finding that the Charter School is not in compliance in one or more operational areas (see page 5 of The Guide) may result in a delay in consideration of the request.

Instructions for the Request

If you have questions about completing the form or uploading documents, contact the Charter Schools Division by emailing charter.schools@state.nm.us. Work through the form, filling in all required fields and attachments (denoted by "*"). Be sure to save your work, even if you aren't prepared to submit your form, so that you do not lose your data

Form Fields

Field	Instructions
From*	Identify in *From* the number of overall annual instructional hours approved for each educational program offered by the school in the charter contract.
To*	Enter the number of overall annual instructional hours that will be provided for each educational program offered by the school. Please note, these numbers must conform to the overall minimum annual instructional hours required in NMSA § 22-2-8.1
Fiscal Year Effective Date*	Enter the proposed fiscal year in which the instructional days change will occur.

Attachments

For further information regarding specific documentation requirements, see pages 6–15 of The Guide and the substantive completeness requirements found below.

Board Minutes*
Attach evidence that the proposed change has been approved by the Charter school board.

School Calendar*
Provide the school calendar for the fiscal year the request will become effective, clearly indicating any days using alternate daily schedules (e.g. early release days). If the school offers multiple educational programs, the school must provide a calendar for each program. If this is different from the calendar that was submitted to the PED School Budget and Financial Analysis Bureau, please provide documentation to demonstrate that the charter school has submitted the change to the Secretary and received approval of the change.

Daily Instructional Schedule(s)*
Provide daily instructional schedule(s) clearly identifying instructional and non-instructional periods, for each grade served. Include any alternate schedules (e.g. early release days) identified in the school calendar. If the school offers multiple educational programs, the school must provide daily scheduled for each program.

Narrative*
Upload a narrative that responds to the following prompts:

☐   Describe the rationale for this request.

☐   Describe how the proposed change to instructional days will improve pupil achievement in the target population served by the charter.

☐   Describe how the school calendar(s) and daily instructional schedule(s) submitted demonstrate compliance with NMSA § 22-2-8.1 regarding annual instructional hours for each grade served.

☐   Describe the budget impact of the change and explain how the change results in that impact.

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Administrative Completeness Review

An administratively complete request includes:

☐   Board Minutes
  - Comply with Open Meeting Law
  - Board aligns with what is currently on file with PEC/CSD

☐   School Calendar(s)

☐   Daily Instructional Schedule(s)

☐   Narrative, addressing all prompts

Substantive Completeness Review

The following checklist will be used to determine substantive completeness for this request. Each criterion (if applicable) will either be deemed acceptable or not acceptable.

Review	Criteria

Permanent Change to Overall Instructional Hours Amendment Request	
Board Minutes	Board Minutes that: ☐Indicate that the request has been approved by the appropriate board and is consistent with the submitted form
School Calendar	Calendar includes the following: ☐Current fiscal year dates, including any alternate daily schedules ☐Calendar is provided for each educational program offered by the school
Daily Instructional Schedule(s)	Instructional schedule includes the following: ☐Instructional and non-instructional periods for each grade level served; and ☐Any alternate daily schedules from the school calendar. ☐Instructional schedule is provided for each educational program offered by the school
Rationale (Narrative)	Description includes the following: ☐Rationale for increase or decrease in instructional days
Improved Pupil Achievement	Description includes the following: ☐How the change will improve pupil achievement
Compliance with NMSA § 22-2-8.1 (Narrative)	Description includes the following: ☐How the school calendar and schedule(s) submitted demonstrate compliance with NMSA § 22-2-8.1
Budget Impact	Description includes the following: ☐How the change will impact the school budget and why that impact will result

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New School or School Site Amendment Request

Purpose

The *New School Amendment Request* is used to add a new charter school or school site to the existing contract. The request must be submitted timely so that it may be processed within the timeframe provided in the PEC policy and implemented starting at the beginning of the next fiscal year (consideration at the January meeting is the latest possible consideration for a new school or school site amendment to become effective in the next fiscal year). The addition of a new school or school site is not effective until approved by the PEC.

Determining Eligibility

To determine whether your charter school is eligible to expand (add a new school or school site) using the Amendment Process, review the academic performance of the school. The new school or school site expansion process is open to any charter school if the school has:

- Been renewed at least once;
- Received no lower than a "B" letter grade in any of the past three years with no single indicator in the letter grade receiving a rating below "C" in the current year;
- Met each of its mission specific goals in each of the last three years;
- Has not had its board of finance revoked within the last three years;
- Has maintained at least 75% student retention within and between school years in each of the last three years;
- Annually, ~~at the beginning of each year~~, the school has a ratio of 3 applications for every 1 student vacancy; ~~has a waiting list that is equivalent to at least 50% of the current school population; and~~
- Informed the school district in which the school is seeking to locate the new school or school site, on or before January 15th, of the intention to open a new school in the district;
- With the participation of the PEC, held a community input hearing in the district in which the school is seeking to locate the new school or school site; and
- Is seeking to open a new school or school site located in the same district as the current school.
  OR
  Has received a discretionary waiver from the Secretary of Education to locate in a different district. ~~and has, with the participation of the PEC, held a community input hearing in the district in which the school is seeking to locate the new school or school site.~~

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PEC Consideration

A substantively complete amendment request submitted by a charter school that meets the eligibility criteria shall be placed on the agenda of a regular PEC meeting. A finding that the Charter School is not in compliance in one or more operational areas (see page 5 of The Guide) may result in a delay in consideration of the request. The most current academic data will be provided to the PEC for its consideration of the amendment request.

Staff Recommendation

A *New School Amendment Request* will receive a staff recommendation *for* the expansion if the Charter

Holder's current data and performance demonstrates all of the following criteria.

Charter school has been renewed at least once~~in operation for three years~~;
Received no lower than a "B" letter grade in any of the past three years with no single indicator in the letter grade receiving a rating below "C" in the current year;
Met each of its mission specific goals in each of the last three years;
Has not had any multi-year repeat findings in any of the past three years;
Has received an unmodified audit opinion in each of the past three years;
Is not currently on monthly reporting with the School Budget and Financial Analysis Bureau that has been required for more than 1 year;
Has not had its board of finance revoked within the last three years;
Has maintained at least 75% student retention within and between school years in each of the last three years;
The school is currently at capacity and the waitlist from the beginning of the current year could fill enrollment for the new school or school site that has been requested;
The school has fully addressed the prompts regarding staffing, curriculum, and facility submissions to support the expansion;
The current school performs at or above the average performance of a majority of schools within the proposed school's feeder pattern based on location.

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Instructions for the Request

If you have questions about completing the form or uploading documents, contact the Charter Schools Division by emailing charter.schools@state.nm.us. Work through the form, filling in all required fields and attachments (denoted by "*"). Be sure to save your work, even if you aren't prepared to submit your form, so that you do not lose your data.

Form Fields

Field	Instructions
Name of School*	Enter the name of the new school or school site.
Grade levels to be served*	Check the boxes for the grades to be served by the new school or school site. The grades must be currently approved for the charter or the application must be accompanied by a Grade Level Amendment Request.
First day of Operation*	Enter the proposed first day of school for the new school or school site.
Physical Address*	Enter the physical street address of the new school or school site.
Physical Phone Number*	Enter the telephone number of the new school or school site.
Physical Fax Number	Enter the fax number of the new school or school site, if applicable.
Mailing Address*	Enter the mailing address of the new school or school site. If it is the same as the physical address, check the box.

Attachments

For further information regarding specific documentation requirements, see pages 6–15 of The Guide and the administrative and substantive completeness requirements starting on page 4 of these instructions.

Board Minutes*
Attach evidence that the proposed change has been approved by the Charter school board.

Occupancy Documentation*

For the proposed facility, clearly label and provide the following documents:

- A Certificate of Occupancy, approved for educational use;
- NMCI letter from the PSFA;
- Documentation of the capacity load of the facility to document capacity that can sustain enrollment requested for new school or school site (hand-drawn images will not be accepted); and
- Lease (as relevant), lease purchase agreement (as relevant), or purchase contract (as relevant) and an affidavit verifying compliance with legal requirements.

Affidavit and Disclosure *
Attach an Affidavit and Disclosure for the new Head Administrator or Principal for the new school or school site. Each form must be signed and dated by the individual named on the form. The form must be notarized before it is scanned and attached to the request.

Copy of Current Liability Insurance Coverage*
Upload the appropriate documentation, which must identify the charter school requesting expansion.

Narrative*
Upload a narrative that responds to the following prompts:

☐ Describe the rationale for this request.

☐ Provide a detailed staffing plan consistent with each Staffing Chart submitted with this request. Describe how the staffing (administrative, instructional, and non-instructional), enrollment, and target population needs will be addressed by the following processes:

- o Recruitment;
- o Hiring; and
- o Training.

☐ If changes to staffing are not needed, provide an explanation.

☐ Identify the target population of the proposed school, and demonstrate a clear understanding of the following:

- o The students the proposed school intends to serve;
- o How the population is similar to, or different from, the population currently served by the school(s) operating under the charter;
- o Whether the students will be primarily neighborhood or commuter;
- o A demographic profile of the population;
- o Current levels of academic performance for the target population; and
- o Needs not currently met for the target population.

☐ Describe how the school will provide a quality academic option and/or a unique program of instruction that is currently unavailable to the target population and how it will meet the needs of the target population.

☐ Identify the number of overall instructional days hours the school will be in sessionprovide.

☐ Provide a detailed description of how the Charter Holder will meet the enrollment targets identified in the Enrollment Matrix. Include the following:

  o A plan for meeting targets;

  o Necessary advertising and/or promotion to meet the targets;

  o The timeline for enrollment at the proposed school, and explains the process for communicating to the public.

☐ Provide a description of the market analysis that supports the successful enrollment of the projected student count. Include the following:

  o Other educational options available to students in the target area;
  o An explanation of need for the school; and
  o Factual data to support the need.

☐ Identify the concrete resources, if any, needed for implementation. Consider the changes needed to curriculum, assessment, and instruction to implement this request. Provide the rationale for your response. If the response indicates that resources are not needed to implement the request, explain why.

☐ The first payment for a school year is not distributed until July 1st of the Fiscal Year. Explain how the Charter Holder will manage all expenses prior to receiving this initial payment, including, but not limited to, those already identified in the staffing and resource components of the narrative. Include the following, as applicable:

  o Recruiting, hiring, and training employees o Advertising and/or promoting the school o Enrolling students
  o Purchase of concrete resources
  o Facilities
  o Other items as indicated by the request

Additional Information
Attach each of the following documents:

- Enrollment Matrix*
  - o Complete for the current school, detailing the current and targeted number of students served per grade for the subsequent three Fiscal Years. Additionally, complete the matrix for the proposed school for its first three Fiscal Years.
- Staffing Chart*
  - o Complete for the current school, identifying the current and anticipated staffing information for the subsequent three Fiscal Years. Additionally, complete the chart for the proposed school in its first three Fiscal Years.
- Certified copy of the currently operating school's waitlist enrollment information from the beginning of the current year enrollment period, including vacancies and applications.
- Certification that the new school or school site is located in the same district as the current school OR

  Copy of the discretionary waiver from the Secretary of Education to locate in a different district.
- and transcript Transcript from the community input hearing in the district in which the school is

seeking to locate the new school or school site.

Administrative Completeness Review

An administratively complete request is submitted by a school that meets all eligibility criteria and includes the following:

☐ Board Minutes
  • Comply with Open Meeting Law
  • Board aligns with what is currently on file with PEC/CSD
☐ Occupancy Documentation
  • Certificate of Occupancy, approved for educational use; and
  • Documentation of the capacity load of the facility to document capacity that can sustain enrollment requested for new school or school site (hand-drawn images will not be accepted.
☐ NMCI letter from the PSFA
☐ Lease (as relevant), lease purchase agreement (as relevant), or purchase contract (relevant) and an affidavit verifying compliance with legal requirements
☐ Copy of liability insurance coverage
☐ Copy of Affidavit and Disclosure for school administrator for new school or school site
☐ Narrative, addressing all prompts
☐ Completed Enrollment Matrix for each school operated or proposed
☐ Completed Staffing Chart for each school operated or proposed
☐ Certified copy of the currently operating school's waitlist from the beginning of the current year.
☐ Waiver and Community Input Hearing Documentation (if applicable)

Substantive Completeness Review

The following checklist will be used to determine substantive completeness for this request. Each criterion (if applicable) will either be deemed acceptable or not acceptable.

Review	Criteria
Board Minutes	Board Minutes that: ☐Indicate that the request has been approved by the appropriate board and is consistent with the submitted form.
Occupancy Documentation	☐The Certificate of Occupancy demonstrates the facility for the proposed school is approved for E Occupancy. ☐ Documentation to demonstrate sufficient capacity for requested enrollment cap for new school or school site. ☐The NMCI for facility for proposed school meets statutory requirements
Lease Agreement, Lease Purchase Agreement, or Purchase Contract	☐Documentation demonstrates an agreement for the proposed facility that complies with statutory requirements. ☐Affidavit is complete and raises no substantial concerns
Affidavit and Disclosure	☐ Affidavit is complete and raises no substantial concerns

New School or School Site Amendment Request	
Liability Insurance Coverage	☐Copy of current insurance policy with school's name as policyholder/insured.
Rationale (Narrative)	Description includes the following: ☐Rationale for adding a new school; and ☐Rationale is consistent with information contained in all applicable narrative prompt responses and accompanying attachments.
Staffing Chart	☐Completed Staffing Charts are provided for the currently operated school and the proposed school. ☐Staffing Charts include a leadership section for the currently operated school and the proposed school. ☐Staffing Charts are consistent with information contained in all applicable narrative prompt responses and accompanying attachments.

Staffing Plan (Narrative)	☐Plan describes changes to instructional, non-instructional, and administrative staff in the Staffing Charts.
	
	☐Staffing, enrollment, and target population needs are addressed by the following processes:
	
	    ☐Recruitment;
	
	    ☐Hiring; and
	
	    ☐Training.
	
	☐If no changes to staffing, the plan describes why there are no needed changes.
	
	☐Staffing Plan is consistent with the information contained in all applicable narrative prompt responses and accompanying attachments.

Target Population (Narrative)	Response includes the following: ☐Identification of the target population; ☐How the target population is similar to, or different from, the current population served by the charter; and ☐Whether the population will be primarily neighborhood or commuter students. Response provides the target population's: ☐Demographic profile; ☐Current levels of academic performance (e.g. PARCC information and letter grades); and ☐Needs not currently met. ☐Target population information is consistent with information contained in all other applicable narrative prompts and accompanying attachments.

Quality Option or Unique Program of Instruction (Narrative)	Description includes: ☐Reason(s) the school provides a quality academic option; or ☐Reason(s) the school provides a unique program of instruction. 　☐If both apply, both have been addressed. ☐How these reasons meet the needs of the target population. ☐Description is consistent with information contained in all applicable narrative prompts and accompanying attachments.
Instructional Days (Narrative)	☐The number of instructional days is identified.
Enrollment Matrix	☐ An Enrollment Matrix is completed for the current and subsequent three Fiscal Years for the currently operated school, as well as for the proposed school. ☐ Each Enrollment Matrix is consistent with information contained in all applicable narrative prompts and accompanying attachments.
Enrollment Targets (Narrative)	☐Description of enrollment is consistent with the targets identified in each Enrollment Matrix submitted. Description includes the following: 　☐A plan for meeting targets; and 　☐Necessary advertising and/or promotion to meet the targets. ☐Description of the market analysis, to include the following: 　☐Other educational options available to students in the target area; 　☐An explanation of need for the school; and 　☐Factual data to support the need. ☐Timeline for enrollment at the proposed school is included and explains how it will be communicated to the public. ☐Description is consistent with information contained in all applicable narrative prompts and accompanying attachments.
Resources (Narrative)	Concrete resources are identified for the following areas: ☐Curriculum; and/or ☐Assessment; and/or ☐Instruction. ☐Rationale includes why these resources are needed, or why additional resources are not needed to implement the request. ☐Identified resources are consistent with information contained in all applicable narrative prompts and accompanying attachments.

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New School or School Site Amendment Request	
Management of Expenses (Narrative)	A viable and adequate plan for managing all initial expenses, to include the following: ☐Recruiting, hiring, and training employees (if applicable) ☐Advertising and/or promoting the school (if applicable) ☐Enrolling students (if applicable) ☐Purchase of concrete resources (if applicable) ☐Facilities (if applicable) ☐Other items as indicated by the request (if applicable) ☐Start-up Plan is consistent with information contained in all applicable narrative prompts and accompanying attachments.
Currently Operating School's Enrollment Application and Vacancy Data	☐Copy is certified ☐Demonstrates the school received at least 3 applications for every 1 vacancy during enrollment period
Community Input Hearing Documentation	☐Community Input Hearing was held with participation of the PEC ☐Community Input Hearing, while it may demonstrate some opposition to the new school or new school site, also demonstrates that there is community support and desire for the new school or school site
Waiver Documentation (if applicable)	☐Secretary of Education has granted a waiver allowing the school to add an additional school (new school or school site) in a different district

ITEMS NOT PREVIOUSLY REVIEWED BY COMMISSION

Educational Program Amendment Request

Purpose

The *Educational Program Amendment Request* is used to change the educational program as described in the charter contract. Note that any changes made need to support the charter mission, and as amended. The Amendment Request may not change the essence of the school's mission or program. The request must be submitted timely so that it may be processed within the timeframe provided in the PEC policy and implemented starting at the beginning of the next fiscal year (consideration at the June meeting is the latest possible consideration for an amendment to become effective in the next fiscal year). **If the fiscal year has started or will start prior to the request being considered by the PEC**, an amendment request will be effective only in the subsequent fiscal year, if it is approved. A change in grades served is not effective until approved by the PEC.

Determining Eligibility

Any charter school is eligible to submit an *Educational Program Amendment Request*.

Board Consideration

A substantively complete amendment request submitted by a charter school that meets the eligibility criteria shall be placed on the agenda of a regular PEC meeting. A finding that the Charter school is not in compliance in one or more operational areas (see page 5 of The Guide) may result in a delay in consideration of the request.

Staff Recommendation

An *Educational Program Amendment Request* for an increase in grades served will receive a staff recommendation *for* the change if the Charter school's meets the following criteria.

The school has fully addressed the prompts regarding alignment to mission, improving student achievement, and transition plan.

Instructions for the Request

If you have questions about completing the form or uploading documents, contact the Charter Schools Division by emailing charter.schools@state.nm.us. Work through the form, filling in all required fields and attachments (denoted by "*"). Be sure to save your work, even if you aren't prepared to submit your form, so that you do not lose your data.

Form Fields

Field	Instructions
Change From*	Provide the current contractual language describing the Educational Program elements the school seeks to change; if there is no specific language, describe the Educational Program elements the school seeks to change that are implied in the current contract.
Change To*	Provide the specific contractual language the school would like to have included in the Educational Program section of the contract.

Attachments

For further information regarding specific documentation requirements, see pages 6–15 of The Guide and the administrative and substantive completeness requirements starting on page 3 of these instructions.

Curriculum Samples

Attach curriculum samples for each grade level being served that will be impacted by the amendment. Curriculum samples must reflect implementation of the new/revised educational program, as described in the instructions on the Curriculum Sample Instructions and Template beginning on page 7 of these instructions.

Board Minutes*
Attach evidence that the proposed change has been approved by the Charter school board.

Narrative*
Upload a narrative that responds to the following prompts:
☐   Describe the rationale for the change in the Educational Program.
☐   Describe the proposed changes to the Educational Program, including the following:

- Curriculum (which clearly demonstrates alignment to the New Mexico Common Core State Standards and New Mexico Content Standards);
- Methods of instruction; and
- Formative and summative assessments.

 If changes to one or more areas are not needed, provide an explanation.

☐   Explain how the proposed changes to the Educational Program align to the mission documented in the charter.

☐   Explain how the proposed changes to the Educational Program improve student achievement in the target population served by the charter.

☐   Discuss the transition plan for the changes to the Educational Program, including the following:

- Timeframes for implementation of the changes;
- Purchasing necessary resources (e.g. curriculum and assessment materials) to implement the changes;
- Hiring and/or Training staff to effectively implement the changes; and

- Providing evaluation (monitoring) and support to address challenges encountered during the implementation of the change and ensure improved student achievement.

Administrative Completeness Review

An administratively complete request includes the following:

☐ Board Minutes
  - Comply with Open Meeting Law (if applicable)
  - Board aligns with what is currently on file with ASBCS
☐ Narrative, addressing all prompts
☐ Curriculum Samples for each grade the school serves that will be impacted by the change to the educational program. See Curriculum Sample Instructions and Template beginning on page 7 of these instructions. The curriculum samples should reflect the

Substantive Completeness Review

The following checklist will be used to determine substantive completeness for this request. Each criterion (if applicable) will either be deemed acceptable or not acceptable.

Review	Criteria
Board Minutes	Board Minutes that: ☐Indicate that the request has been approved by the appropriate board and is consistent with the submitted form.
Rationale (Narrative)	Description includes the following: ☐Rationale for the change in the Educational Program. ☐Rationale is consistent with information contained in all applicable narrative prompt responses and accompanying attachments.
Proposed Changes (Narrative)	Description includes the following: ☐ Curriculum (which clearly demonstrates alignment to the New Mexico Common Core State Standards and New Mexico Content Standards) ☐Changes to the methods of instruction ☐Changes to formative and summative assessments ☐If any of the three areas are not being changed, an explanation of how this area will remain consistent with the new Educational Program is included. ☐Described changes are consistent with information contained in all applicable narrative prompt responses and accompanying attachments.

Alignment to Mission **(Narrative)**	☐Explanation of how the proposed changes align to the mission documented in the charter. ☐Explanation of how the proposed changes align to the educational philosophy of the charter. ☐The proposed Educational Program is consistent with information contained in all applicable documents on file with PEC/CSD. If not, appropriate amendments have been filed to reconcile this misalignment. ☐Described alignment is consistent with information contained in all applicable narrative prompt responses and accompanying attachments.
Improved Pupil Achievement (Narrative)	☐Explanation of how the proposed changes improve student achievement in the target population. ☐Explanation is consistent with information contained in all applicable narrative prompt responses and accompanying attachments.
Transition Plan (Narrative)	Description of the transition plan , including the following: ☐Timeframes for implementation of the changes; ☐Purchasing necessary resources to implement the described changes; ☐Hiring or training staff to effectively implement the changes; and ☐Providing evaluation (monitoring) and support to address challenges encountered during the implementation of the change and ensure improved student achievement. ☐Transition plan is consistent with information contained in all applicable narrative prompt responses and accompanying attachments.
Curriculum Samples	See Criteria for Substantive Completeness in the Curriculum Sample Instructions and Template <mark>on page 10</mark> of these instructions.

Curriculum Sample Instructions and Template

All schools requesting to change the Educational Program of the school.

Curriculum samples provide a representation of an Educational Program aligned to the New Mexico Common Core State Standards and the New Mexico Content Standards and to the methods of instruction described in the charter contract, and as amended. The curriculum samples allow the Charter school to demonstrate its capacity to develop a curriculum aligned to these standards and designed to improve pupil academic achievement.

Directions

For each grade level being served that will be impacted by the proposed change, provide curriculum samples for Reading, Writing, and Math using the Curriculum Sample Template. Reading and Writing standards may be addressed in a single English Language Arts (ELA) curriculum sample. If the changes will impact 4th, 7th, and/or 11th grade, provide a Science curriculum sample.

Each curriculum sample addressing a single content area may not exceed 8 pages. If the Reading and Writing curriculum samples for a grade level are submitted as a single ELA curriculum sample, the ELA curriculum sample may not exceed 12 pages. The 8 page limitation (or 12 page limitation for an integrated ELA sample) includes the completed curriculum sample template fields, summative assessment items, and scoring information included for review.

Each curriculum sample must address at least one standard from a content area (Reading, Writing, Math, or Science) for the grade level requested. If more than one standard is addressed in a curriculum sample, indicate one standard that is instructed and assessed to mastery to be **the focus of review** by putting **(M)** before the standard number.

> **Reading**—Each Reading/ELA curriculum sample must identify as the focus of review one standard from the Reading strand (either Reading for Literature or Reading for Informational Text), **not** to include RL.10 or RI.10, OR one of the additional 15% of state-specific standards in ELA which focus on cultural responsiveness.

> **Writing**—Each Writing/ELA curriculum sample must identify as the focus of review one standard from the Writing strand (Text Types and Purposes only—**W.1, W.2, or W.3**) OR one of the additional 15% of state-specific standards in ELA which focus on cultural responsiveness.

> **Mathematics**—Each Mathematics curriculum sample must identify one standard from Mathematics to be the focus of review, along with the Standard(s) for Mathematical Practice addressed by the instructional strategies and student activities in the curriculum sample. Standards for Mathematical Practice may not be the focus of review, but should be identified by number when addressed in the instructional strategies and student activities. If any high school grade (9–12) is to be added, the Charter school will provide four curriculum samples representing the four State required high school courses in Mathematics (Algebra, Geometry, Algebra II or its equivalent, and an additional course with significant math content).

> **Science**—A Science curriculum sample must be submitted for charters requesting an amendment to the educational program that will impact 4th, 7th, and/or 11th grade. Each Science curriculum sample must identify one performance standard (PS) from a Science strand (Strands 2–3 only). Strand 1 (Scientific thinking and practice) may not be the focus of review, but should be identified by number

when addressed in the instructional strategies and student activities.

What about standards with several components?

Each curriculum sample must provide instruction and student activities sufficient to allow a student the opportunity to master the standard identified for review, with assessment items and scoring sufficient to allow that student to clearly demonstrate mastery. Certain standards include multiple components that describe an amount of content and/or skill knowledge that might be difficult to fully address within the page limitations described above.

If the standard has **two or fewer components** identified by lower-case letter (e.g. 3.NF.2 below), the sample must address the **complete** standard including the **overall broad standard description** (double underlined below) and **all components**.

(**M**) 3.NF.2:	Understand a fraction as a number on the number line; represent fractions on a number line diagram.
a.	Represent a fraction 1/*b* on a number line diagram by defining the interval from 0 to 1 as the whole and partitioning it into *b* equal parts. Recognize that each part has size 1/*b* and that the endpoint of the part based at 0 locates the number 1/*b* on the number line.
b.	Represent the fraction *a/b* on a number line by marking off a lengths 1/*b* from 0. Recognize the resulting interval has size *a/b* and that its endpoint locates the number *a/b* on the number line.

If the standard includes **more than two components** identified by lower-case letter (e.g. 4.W.1 below), the Charter school is required to address the **overall broad standard description** (double underlined below) and **not fewer than two components** (e.g. 4.W.1, b. and d., underlined below). The components identified for review must address grade-level rigor (see **What is rigor?** below).

(**M**) 4.W.1	Write opinion pieces on topics or texts, supporting a point of view with reasons and information.
a.	Introduce a topic or text clearly, state an opinion, and create an organizational structure in which related ideas are grouped to support the writer's purpose.
b.	(**M**) Provide reasons that are supported by facts and details.
c.	Link opinion and reasons using words and phrases (e.g., for instance, in order to, in addition).
d.	(**M**) Provide a concluding statement or section related to the opinion presented.

What is rigor?

For the **Reading and Writing** curriculum samples, the requirements include addressing the grade-level rigor defined by the listed standard. For the purposes of this request, **grade-level rigor** is the expectation set by New Mexico's Common Core State Standards and New Mexico's Content Standards that includes a level of content and/or skills the student must master at that grade level. The increased rigor at each grade level can be identified by the changes in the standard description from the same standard at the prior grade level.

For the **Mathematics** curriculum samples, the requirements include addressing the grade-level rigor defined by the listed standard. For the purposes of this request, **grade-level rigor** is the expectation set by New Mexico's Common Core State Standards and New Mexico's Content Standards that includes a level of conceptual understanding, procedural skill and fluency, and application the student must master at that grade level, as defined by the standard description.

Administrative Completeness Checklist

An administratively complete curriculum sample includes the following:

☐	Page Limits • Each curriculum sample must be no more than **8 pages total**. The page limit increases to 12 pages total when combining Reading and Writing into one integrated ELA curriculum sample.
☐	Template • The attached Curriculum Sample Template must be used for all curriculum sample submissions.
☐	Fonts • Fonts must be no less than **10 point**.
☐	Grade Level • The curriculum sample must identify the grade level of that sample.
☐	Content Area • The curriculum sample must identify the content area of that sample.
☐	Course Title (if requesting any grade(s) between 9–12) • The course title must be provided.
☐	Alignment to Educational Program • Describe how the instructional methods found in the lesson(s) align to the Educational Program Amendment Request.
☐	Standard identified to be the focus of review • Include Standard number. • If lesson(s) address(es) more than one standard or standard includes multiple components, refer to **What standards may be used?** or **What about standards with several components**? above. • The focus of review is designated with the bolded **(M)**. • **Reading**: one standard from the Reading strand (either Reading for Literature or Reading for Informational Text), **not** to include RL.10 or RI.10, OR one of the additional 15% of state-specific standards in ELA which focus on cultural responsiveness. • **Writing**: one standard from the Writing strand (Text Types and Purposes only—**W.1, W.2, or W.3**), OR one of the additional 15% of state-specific standards in ELA which focus on cultural responsiveness. • **Mathematics**: one standard from Mathematics to be the focus of review, along with the Standard(s) for Mathematical Practice addressed by the instructional strategies and student activities in the curriculum sample. Standards for Mathematical Practice may not be the focus of review, but should be identified by number when addressed in the instructional strategies and student activities. If any high school grade (9–12) is to be added, the Charter school will provide four curriculum samples representing the four State required high school courses in Mathematics (Algebra, Geometry, Algebra II or its equivalent, and an additional course with significant math content).
☐	Full description of standard identified as the focus of review
☐	List of Materials and Resources required
☐	Description of Instructional Strategies and Student Activities by lesson
☐	A minimum of three Summative Assessment Items for each of the following content areas—Reading, Writing, Mathematics, and Science (if applicable)
☐	The answer key or scoring rubric (whichever applicable) for each Summative Assessment Item including point values and how points will be awarded
☐	An acceptable score indicating mastery of the standard for review

Substantive Completeness Checklist

A substantively complete curriculum sample template will do the following:

☐	Instructional Strategies • Describe the Instructional Strategies, lesson by lesson, that would clearly provide students with opportunities to engage in the grade-level rigor defined in the standard identified as the focus of review.
☐	Student Activities • Describe the Student Activities, lesson by lesson, that would clearly provide students with opportunities to engage in the grade-level rigor, defined in the standard identified as the focus of review.
☐	Summative Assessment Items • Provide an opportunity for students to complete the Summative Assessment Items. These Summative Assessment Items are assessed independently and are separate from instruction and guided or independent practice.
☐	Summative Assessment Items • Provide at least three Summative Assessment Items for each content area—Reading, Writing, Mathematics, and Science (if applicable) • Answer key(s) and/or scoring rubric(s), clearly describing, for each Summative Assessment Item, components to be scored and how points will be awarded, that taken together accurately measure student mastery of the application of the content and/or skills as defined by the grade-level rigor in the standard identified for review. • Mastery of the application of the content and/or skills as defined by the grade-level rigor in the standard identified for review is clearly demonstrated by an identified acceptable score or combination of identified acceptable scores.
☐	Educational Program • Provide Instruction, Student Activities, and Summative Assessment Items that are clearly consistent with Educational Program Amendment Request.

Curriculum Sample Template—8 Pages Max. (12 pages for integrated ELA sample). **Instruction Pages above should be deleted before submission.**

Grade Level		**Content Area**	
Course Title (grades 9–12 Only)			
Alignment to Educational Program *Describe how the methods of instruction found in this sequence of lessons align to the Educational Program described in the charter contract and the Amendment Request.*			
Standard Number and Description *The standard number and description (see instructions) of the standard being instructed and assessed to mastery in the curriculum sample. If more than one Standard is listed for a content area,* ***one is clearly identified as the focus of review*** *by having **(M)** before the standard number.*			
Materials/Resources Needed *List all items the teacher and students will need for the entire sequence of instruction (excluding common consumables).*			

Lesson (add as needed)	Instructional Strategies—*Describe the Instructional Strategies, lesson by lesson, that would clearly provide students with opportunities to engage in the grade-level rigor defined by the Standard identified as the focus of review.*	Student Activities—*Describe the Student Activities, lesson by lesson, that would clearly provide students with opportunities to engage in or master the grade-level rigor defined by the standard identified as the focus of review.* *Indicate alignment of Student Activities to the standard/component identified as the focus of review and specific Standard(s) of Mathematical Practice.*
1		
2		
3		
4		
S.A.	*Provide an opportunity for students to complete the Summative Assessment Items. These Summative Assessment Items are assessed independently and are separate from instruction and guided or independent practice. In the Student Activities column, describe the Summative Assessment Items that will allow students to demonstrate mastery of the rigor of the standard/components identified as the focus of review, and the context in which the items will be administered.*	

Summative Assessment Items and Scoring:

Provide below, at least three Summative Assessment Items for each content area, with answer key(s) and/or scoring rubric(s), clearly describing, for each Summative Assessment Item, components to be scored and how points will be awarded, that together accurately measure student mastery of the application of the content and/or skills as defined by the grade-level rigor in the standard identified for review. Mastery of the application of the content and/or skills as defined by the grade-level rigor in the standard identified for review is clearly demonstrated by an identified acceptable score or combination of identified acceptable scores.

Partner or Management Company Amendment Request

Purpose

The *Partner or Management Company Amendment Request* is used to change a Partner or Management Company identified in the charter contract (this can be a removal, addition, or change).

Determining Eligibility

Any Charter School may submit a *Partner or Management Company Amendment Request*.

PEC Consideration

A substantively complete amendment request submitted by a Charter School will be placed on the agenda of a regular Board meeting. A finding that the Charter School is not in compliance in one or more operational areas (see page 5 of The Guide) may result in a delay in consideration of the request.

Instructions for the Request

If you have questions about completing the form or uploading documents, contact the Charter Schools Division by emailing charter.schools@state.nm.us. Work through the form, filling in all required fields and attachments (denoted by "*"). Be sure to save your work, even if you aren't prepared to submit your form, so that you do not lose your data

Form Fields

Field	Instructions
From*	Identify in *From* the current Partner or Management Company included in the charter contract.
To*	Identify the new language that is to be included in the charter contract. This may be an addition, removal, or change.

Attachments

For further information regarding specific documentation requirements, see pages 6–15 of The Guide and the substantive completeness requirements found below.

Board Minutes*
Attach evidence that the proposed change has been approved by the Charter school board.

Agreement, MOU, or Contract*
Provide the Agreement, MOU, or Contract under which the school and the partner or management company are operating. This agreement must clearly identify all rights, responsibilities, activities, and costs of both sides.

Corporate Status of Partner or Management Company*
Provide documentation of the corporate status (for-profit or non-profit) of the partner or management company.

Narrative*

Upload a narrative that responds to the following prompts:

☐ Describe the rationale for this request.

☐ Describe all legal implications of the relationship including the legal benefits and responsibilities of each party.

☐ Identify specific individuals employed or selected by the partner or management company that will be associated with the school, their responsibilities, and their contact information.

☐ Describe the criteria and procedures the school uses to review the provider's performance under the MOU, Agreement, or Contract, including a timeline for how often this review is conducted and the school's rights to terminate the agreement based on performance or for other causes.

☐ Describe the degree to which the charter school is operationally and financially independent from the partner or Management Company.

Administrative Completeness Review

An administratively complete request includes:

☐ Board Minutes
  - Comply with Open Meeting Law
  - Board aligns with what is currently on file with PEC/CSD

☐ Agreement, MOU, or Contract

☐ Corporate Status of Partner or Management Company

☐ Narrative, addressing all prompts

Substantive Completeness Review

The following checklist will be used to determine substantive completeness for this request. Each criterion (if applicable) will either be deemed acceptable or not acceptable.

Review	Criteria
Board Minutes	Board Minutes that: ☐ Indicate that the request has been approved by the appropriate board and is consistent with the submitted form
Agreement, MOU, or Contract	The agreement includes the following: ☐ The Agreement, MOU, or Contract under which the school and the partner or management company are operating ☐ Identifies specific rights, responsibilities, activities, and costs of both sides. ☐ Is consistent with information contained in all applicable narrative prompt responses and accompanying attachments.
Corporate Status of Partner or Management Company	Corporate Status of Partner or Management Company includes the following: ☐ For agreements that assign the management of the school, the management company is not a for-profit entity (NMSA 1978 § 22-8B-4(R)) ☐ Is consistent with information contained in all applicable narrative prompt responses and accompanying attachments

Rationale (Narrative)	Description includes the following: ☐ Rationale for change is consistent with information contained in all applicable narrative prompt responses and accompanying attachments.
Legal Implications (Narrative)	Description includes the following: ☐ Specific legal implications of the relationship including the legal benefits and responsibilities of each party. ☐ Is consistent with information contained in all applicable narrative prompt responses and accompanying attachments.
Identification of Partner Organization of Management Company Representatives (Narrative)	Description includes the following: ☐ Specific individuals employed or selected by the partner or management company that will be associated with the school. ☐ Responsibilities of each identified individual ☐ Contact information for each identified individual ☐ Is consistent with information contained in all applicable narrative prompt responses and accompanying attachments.
Review of Partner or Management Company Performance (Narrative)	Description includes the following: ☐ Criteria and procedures the school uses to review the provider's performance under the MOU, Agreement, or Contract ☐ A timeline identifying how often this review is conducted ☐ The school's rights to terminate the agreement based on performance or for other causes.
Financial and Operational Independence (Narrative)	Description includes the following: ☐ Identification of operational and financial independent from the partner or Management Company.

Performance Framework Academic Goal Amendment Request

Purpose

The *Performance Framework Academic Goal Amendment Request* is used to amend a current Academic Performance Framework Goal. The request must be submitted timely so that it may be processed within the timeframe provided in the PEC policy and implemented no later than the first month of the next school year (consideration at the August meeting is the latest possible consideration for an amendment to become effective in the current fiscal year). A change performance framework academic goals is not effective until approved by the PEC.

Determining Eligibility

Any Charter School may submit a *Performance Framework Academic Goal Amendment Request*. However, the PEC will not accept requests to eliminate a goal without the addition of a "replacement" goal. Additionally, the PEC will not accept a request to decrease the rigor of a goal.

PEC Consideration

A substantively complete amendment request submitted by a Charter School will be placed on the agenda of a regular Board meeting. A finding that the Charter School is not in compliance in one or more operational areas (see page 5 of The Guide) may result in a delay in consideration of the request.

Instructions for the Request

If you have questions about completing the form or uploading documents, contact the Charter Schools Division by emailing charter.schools@state.nm.us. Work through the form, filling in all required fields and attachments (denoted by "*"). Be sure to save your work, even if you aren't prepared to submit your form, so that you do not lose your data

Form Fields

Field	Instructions
From*	Identify in *From* the current Academic Performance Framework Goal.
To*	Identify the new language that is to be included in the Academic Performance Framework. This section may not be left blank. The language must include the following rating categories – Exceeds Standards, Meets Standards, Does Not Meet Standards, and Falls Far Below Standards and Include measures and metrics, including percentages, for each rating category.

Attachments

For further information regarding specific documentation requirements, see pages 6–15 of The Guide and the substantive completeness requirements found below.

Board Minutes*

Attach evidence that the proposed change has been approved by the Charter school board.

Narrative*

Upload a narrative that responds to the following prompts:

☐   Describe the rationale for this request.

☐   Explain why the established goals are rigorous.

☐   Explain why the established goals are attainable.

☐   Describe how the goal meets all of the remaining elements of a SMART goal.

☐   For mission specific goals, describe how the goal aligns to and measures the effective implementation of school's mission.

☐   For academic goals, explain how the school knows the assessment is aligned to and accurately measures the New Mexico Common Core State Standards and the New Mexico Content Standards.

☐   Describe the school's transition plan, including:

- • Timeframes for implementation of the changes;
- • Purchasing necessary resources (e.g. assessment materials) to implement the changes;
- • Training staff to effectively implement the changes; and
- • Providing evaluation (monitoring) and support to address challenges encountered during the implementation of the change.

Administrative Completeness Review

An administratively complete request includes:

☐   Board Minutes
- • Comply with Open Meeting Law
- • Board aligns with what is currently on file with PEC/CSD

☐   Narrative, addressing all prompts

Substantive Completeness Review

The following checklist will be used to determine substantive completeness for this request. Each criterion (if applicable) will either be deemed acceptable or not acceptable.

Review	Criteria
Board Minutes	Board Minutes that: ☐ Indicate that the request has been approved by the appropriate board and is consistent with the submitted form
Rationale (Narrative)	Description includes the following: ☐ Rationale for change is consistent with information contained in all applicable narrative prompt responses and accompanying attachments.
Rigor (Narrative)	Description includes the following: ☐ Explanation of why the goal is rigorous. ☐ Reference to or inclusion of specific data to support explanation. ☐ Proposed goal is not less rigorous than prior goal.

Attainability (Narrative)	Description includes the following: ☐ Explanation of why the goal is attainable. ☐ Reference to or inclusion of specific data to support explanation.
SMART Goal Elements (Narrative)	Description includes the following: ☐ Addresses each applicable element of SMART goals (Specific, measurable, and time-bound)
Alignment to Mission (Narrative)	Description includes the following: ☐ How the goal aligns to and measures the effective implementation of school's mission. ☐ Described alignment is consistent with information contained in all applicable narrative prompt responses.
Standards Alignment (Narrative)	Description includes the following: ☐ How the school knows the assessment is aligned to and accurately measures the New Mexico Common Core State Standards and the New Mexico Content Standards ☐ Described alignment is consistent with information contained in all applicable narrative prompt responses.
Transition Plan (Narrative)	Description of the transition plan , including the following: ☐ Timeframes for implementation of the changes; ☐ Purchasing necessary resources to implement the described changes; ☐ Training staff to effectively implement the changes; and ☐ Providing evaluation (monitoring) and support to address challenges encountered during the implementation of the change. ☐ Transition plan is consistent with information contained in all applicable narrative prompt responses and accompanying attachments.

Head Administrator of Governing Body Membership or Contact Notification Request

Purpose

The *Head Administrator of Governing Body Membership or Contact Notification Request* should be completed if there is a change in the Head Administrator or the Membership of the Governing Body or contact information for any Governing Body member.

Determining Eligibility

Any charter holder is eligible to submit a *Head Administrator of Governing Body Membership or Contact Notification Request*.

pec Consideration

A substantively complete amendment request submitted by a Charter School will be placed on the consent agenda of a regular PEC meeting.

Instructions for the Request

If you have questions about completing the form or uploading documents, contact the Charter Schools Division by emailing charter.schools@state.nm.us. Work through the form, filling in all required fields and attachments (denoted by "*"). Be sure to save your work, even if you aren't prepared to submit your form, so that you do not lose your data. Request must be provided within 30 days of making any change.

Form Fields

Field	Instructions
Current Officers, Directors, Members, or Partners	Identify the currently on file (prior to request) Head Administrator, all governing body members and positions, and contact information. Note next to each if there is a change or no change.
Changes*	Identify the changes to Head Administrator, governing body members or positions, or contact information.
Request for Extension	If changing governing body membership, and a vacancy will not be filled within the 45 days identified in the contract make a request for an extension.
Governing Body Membership Structure*	Identify the current membership structure (number of positions and identification of positions, as applicable)

Attachments

For further information regarding specific documentation requirements, see pages 6–15 of The Guide and the substantive completeness requirements found on page 3 of these instructions.

Board Minutes*

Attach evidence that the proposed change has been approved by the charter school board (resignation accepted, member removed, designation/selection of new member, new Head Administrator Hired, old administrator terminated or contract not renewed).

Affidavit and Disclosure *

Attach an Affidavit and Disclosure for any new Head Administrator or Governing Body Member. Each form must be signed and dated by the individual named on the form. The form must be notarized before it is scanned and attached to the request.

Resignation Letter

If board member resigned, attach signed and dated resignation letter.

Statement of Governing Body to Consult with PED

An updated "STATEMENT OF GOVERNING BODY TO CONSULT WITH PED" signed by all current governing body members must be attached when there is a change in board membership.

Affidavit of Governing Body Member

An "AFFIDAVIT OF GOVERNING BODY MEMBER" must be signed by each new governing body member and verified by a notary public.

Administrative Completeness Review

An administratively complete request includes the following:

- ☐ Board Minutes
  - Comply with Open Meeting Law
  - Board aligns with what is currently on file with PEC/CSD
  - Demonstrates vote to remove and/or add board member AND/OR to terminate and/or hire new administrator
- ☐ Affidavit and Disclosure (Adding only)
- ☐ Resignation Letter (Removing only)
- ☐ Statement of Governing Body to Consult with PED (Adding only)
- ☐ Affidavit of Governing Body Member (Adding only)

Substantive Completeness Review

The following checklist will be used to determine substantive completeness for this request. Each criterion (if applicable) will either be deemed acceptable or not acceptable.

Review	Criteria
Board Minutes	Board Minutes that: ☐ Indicate that the request has been approved by the appropriate board and is consistent with the submitted form.

Business Manager of Procurement Officer Notification Request

Purpose

The *Business Manager of Procurement Officer Notification Request* should be completed if there is a change in the school's business manager or procurement officer.

Determining Eligibility

Any charter holder is eligible to submit a *Business Manager of Procurement Officer Notification Request*.

PEC Consideration

A substantively complete amendment request submitted by a Charter School will be placed on the consent agenda of a regular PEC meeting.

Instructions for the Request

If you have questions about completing the form or uploading documents, contact the Charter Schools Division by emailing charter.schools@state.nm.us. Work through the form, filling in all required fields and attachments (denoted by "*"). Be sure to save your work, even if you aren't prepared to submit your form, so that you do not lose your data. Request must be provided within 30 days of making any change.

Form Fields

Field	Instructions
Current Business Manager or Procurement Officer	Identify the currently on file (prior to request) Business Manager or Procurement Officer.
Changes*	Identify the new Business Manager or Procurement Officer.
Reason for Change	Identify if the change is the result of a resignation or termination. If termination provide reason.
Effective Date*	Identify the effective date of the change.

Attachments

For further information regarding specific documentation requirements, see pages 6–15 of The Guide and the substantive completeness requirements found on page 3 of these instructions.

Affidavit and Disclosure *
Attach an Affidavit and Disclosure for any new Business Manager or Procurement Officer . Each form must be signed and dated by the individual named on the form. The form must be notarized before it is scanned

and attached to the request.

Resignation Letter

If prior manager or officer resigned, attach signed and dated resignation letter.

Affidavit of Financial Record Custodian

A completed and notarized Affidavit of Financial Record Custodian.

Certificate of Insurance

A certificate of insurance indicating the business manager is adequately bonded to take responsibility as the financial record custodian.

Business Official License or Chief Procurement Officer Certificate

Copy of current, valid business official license or chief procurement officer certificate.

Administrative Completeness Review

An administratively complete request includes the following:

☐   Affidavit and Disclosure (Adding only)
☐   Resignation Letter (Removing only)
☐   Affidavit of Financial Record Custodian (Adding only)
☐   Certificate of Insurance (Adding only)
☐   Business Official License or Chief Procurement Officer Certificate (Adding only)

Substantive Completeness Review

The following checklist will be used to determine substantive completeness for this request. Each criterion (if applicable) will either be deemed acceptable or not acceptable.

Review	Criteria
Licensure or Certification	Licensure or Certification indicates: ☐ Individual is certified or licensed to fulfill position.

School Policies or Governing Body By-Laws Notification Request

Purpose

The *School Policies or Governing Body By-Laws Notification Request* should be completed if there is a change to any school policies adopted by the Board or to the Board By-Laws.

Determining Eligibility

Any charter holder is eligible to submit a *School Policies or Governing Body By-Laws Notification Request*.

PEC Consideration

A substantively complete amendment request submitted by a Charter School will be placed on the consent agenda of a regular PEC meeting. However, if a review by PED staff indicates there is a compliance concern or issue with the proposed revision may result in a delay of consideration or may result in the matter being brought to the attention of the PEC.

Instructions for the Request

If you have questions about completing the form or uploading documents, contact the Charter Schools Division by emailing charter.schools@state.nm.us. Work through the form, filling in all required fields and attachments (denoted by "*"). Be sure to save your work, even if you aren't prepared to submit your form, so that you do not lose your data. Request must be provided within 30 days of making any change.

Form Fields

Field	Instructions
Policy Changed*	Identify the policy being changed (or identify By-Laws are being changed)
Date of Change*	Identify the effective date of the change and the vote to implement the change.

Attachments

For further information regarding specific documentation requirements, see pages 6–15 of The Guide and the substantive completeness requirements found on page 3 of these instructions.

Board Minutes*
Attach evidence that the proposed change has been approved by the charter school board.

Revised Policy
Attached the revised policy or by-laws.

Administrative Completeness Review

An administratively complete request includes the following:

☐   Board Minutes
- Comply with Open Meeting Law
- Board aligns with what is currently on file with PEC/CSD

☐   Revised Policy

Substantive Completeness Review

The following checklist will be used to determine substantive completeness for this request. Each criterion (if applicable) will either be deemed acceptable or not acceptable.

Review	Criteria
Board Minutes	Board Minutes that: ☐Indicate that the request has been approved by the appropriate board and is consistent with the submitted form.
Revised Policy	☐If reviewed for substance by PED, the policy complies with legal requirements.

Non-Profit Foundation or Component Unit Notification Request

Purpose

The *Non-Profit Foundation or Component Unit Notification Request* is used to change a school's association with a Non-Profit Foundation or Component Unit identified in the charter contract (this can be a removal, addition, or change).

Determining Eligibility

Any Charter School may submit a *Non-Profit Foundation or Component Unit Notification Request*.

PEC Consideration

A substantively complete amendment request submitted by a Charter School will be placed on the consent agenda of a regular Board meeting.

Instructions for the Request

If you have questions about completing the form or uploading documents, contact the Charter Schools Division by emailing charter.schools@state.nm.us. Work through the form, filling in all required fields and attachments (denoted by "*"). Be sure to save your work, even if you aren't prepared to submit your form, so that you do not lose your data

Form Fields

Field	Instructions
From*	Identify in *From* the current Non-Profit Foundation or Component Unit included in the charter contract. If none, state "None"
To*	Identify the new language that is to be included in the charter contract. This may be an addition, removal, or change.

Attachments

For further information regarding specific documentation requirements, see pages 6–15 of The Guide and the substantive completeness requirements found below.

Board Minutes*
Attach evidence that the proposed change has been approved by the Charter school board.

Agreement, MOU, or Contract
Provide any Agreement, MOU, or Contract under which the school and the Non-Profit Foundation or Component Unit are operating. Any agreement must clearly identify all rights, responsibilities, activities, and costs of both sides.

Corporate Status of Non-Profit Foundation or Component Unit*

Provide documentation of the corporate status (non-profit) and membership and officers.

Narrative*

Upload a narrative that responds to the following prompts:

☐   Describe the rationale for this request.

☐   Describe all legal implications of the relationship including the legal benefits and responsibilities of each party.

☐   Identify specific individuals employed or selected by the Non-Profit Foundation or Component Unit that will be associated with the school, their responsibilities, and their contact information.

☐   Describe the degree to which the charter school is operationally and financially independent from the Non-Profit Foundation or Component Unit.

Administrative Completeness Review

An administratively complete request includes:

☐   Board Minutes
- Comply with Open Meeting Law
- Board aligns with what is currently on file with PEC/CSD

☐   Agreement, MOU, or Contract

☐   Corporate Status of Non-Profit Foundation or Component Unit and identified membership

☐   Narrative, addressing all prompts

Substantive Completeness Review

The following checklist will be used to determine substantive completeness for this request. Each criterion (if applicable) will either be deemed acceptable or not acceptable.

Review	Criteria
Board Minutes	Board Minutes that: ☐Indicate that the request has been approved by the appropriate board and is consistent with the submitted form
Agreement, MOU, or Contract	The agreement includes the following: ☐ The Agreement, MOU, or Contract under which the school and the Non-Profit Foundation or Component Unit are operating ☐Identifies specific rights, responsibilities, activities, and costs of both sides. ☐Is consistent with information contained in all applicable narrative prompt responses and accompanying attachments.
Corporate Status and Membership of Non-Profit Foundation or Component Unit	☐ Demonstrates organization is a non-profit corporation ☐ Identifies all members, officers, and directors
Rationale (Narrative)	Description includes the following: ☐Rationale for change is consistent with information contained in all applicable narrative prompt responses and accompanying attachments.

Legal Implications (Narrative)	Description includes the following: ☐ Specific legal implications of the relationship including the legal benefits and responsibilities of each party. ☐ Is consistent with information contained in all applicable narrative prompt responses and accompanying attachments.
Identification of Non-Profit Foundation or Component Unit Representatives (Narrative)	Description includes the following: ☐ Specific individuals employed or selected by the Non-Profit Foundation or Component Unit that will be associated with the school. ☐ Responsibilities of each identified individual ☐ Contact information for each identified individual ☐ Is consistent with information contained in all applicable narrative prompt responses and accompanying attachments.
Financial and Operational Independence (Narrative)	Description includes the following: ☐ Identification of operational and financial independent from the Non-Profit Foundation or Component Unit.

Membership of Foundation or Component Unit Notification Request

Purpose

The *Membership of Foundation or Component Unit Notification Request* is used to notify the PEC of a change to the Membership of a Non-Profit Foundation or Component Unit identified in the charter contract (this can be a removal, addition, or change).

Determining Eligibility

Any Charter School may submit a *Membership of Foundation or Component Unit Notification Request*.

PEC Consideration

A request submitted by a Charter School will be placed on the consent agenda of a regular Board meeting.

Instructions for the Request

If you have questions about completing the form or uploading documents, contact the Charter Schools Division by emailing charter.schools@state.nm.us. Work through the form, filling in all required fields and attachments (denoted by "*"). Be sure to save your work, even if you aren't prepared to submit your form, so that you do not lose your data

Form Fields

Field	Instructions
From*	Identify in *From* the current Membership of Foundation or Component Unit included in the charter contract.
To*	Identify the new language that is to be included in the charter contract. This may be an addition, removal, or change.

School Closure Notification Request

Purpose

The *School Closure Notification Request* is used when the charter school chooses to close itself.

Determining Eligibility

Any charter school is eligible to submit a *School Closure Notification Request*.

PEC Consideration

A substantively complete notification request submitted by a charter school will be placed on the consent agenda of the next regular PEC meeting.

Instructions for the Request

If you have questions about completing the form or uploading documents, contact the Charter Schools Division by emailing charter.schools@state.nm.us. Work through the form, filling in all required fields and attachments (denoted by "*"). Be sure to save your work, even if you aren't prepared to submit your form, so that you do not lose your data.

Form Fields

Field	Instructions
Last Day of Instruction*	Identify the last day the school will instruct students.

Attachments

For further information regarding specific documentation requirements, see pages 6–15 of The Guide and the substantive completeness requirements found on page 2 of these instructions.

Board Minutes*
Attach evidence that the proposed change has been approved by the Charter school board.

Narrative*
Upload a narrative that responds to the following prompts:

- Provide the rationale for closing the school.
- Identify the number of students displaced by the closure.
- Discuss the plan to communicate the closure to the school community, including providing students with the following:
    o Identifying other educational options; and
    o Enrolling in another school.
- Identify the school representatives responsible for executing each element of the PEC's closure plan.

Administrative Completeness Review

An administratively complete request includes the following:

☐   Board Minutes
- Comply with Open Meeting Law
- Board aligns with what is currently on file with PEC/CSD

☐   Narrative, addressing all prompts

Substantive Completeness Review

The following checklist will be used to determine substantive completeness for this request. Each criterion (if applicable) will either be deemed acceptable or not acceptable.

Review	Criteria
Board Minutes	Board Minutes that: ☐Indicate that the request has been approved by the appropriate board and is consistent with the submitted form.
Rationale **(Narrative)**	Description includes the following: ☐Rationale for closing the school; and ☐Rationale is consistent with information contained in all applicable narrative prompt responses and accompanying attachments.
Number of Students **(Narrative)**	☐Narrative identifies the number of students displaced by the closure.
Communication Plan **(Narrative)**	Response includes the following: ☐Description of the plan to communicate closure to the school community ☐Description of how the Charter school will assist displaced students with the following: ☐Identifying other options; and ☐Enrolling in another school.
Closure Plan **(Narrative)**	Response includes the following: ☐ Identification of the school representatives responsible for executing each element of the PEC's closure plan ☐ Is consistent with information contained in all applicable narrative prompt responses and accompanying attachments.

School Name Change Notification Request

Purpose

The *School Name Change Notification Request* is used to change the name of a charter school.

Determining Eligibility

Any charter school is eligible to submit a *School Name Change Notification Request*.

PEC Consideration

A substantively complete notification request submitted by a charter school placed on the consent agenda of a regular PEC meeting.

Instructions for the Request

If you have questions about completing the form or uploading documents, contact the Charter Schools Division by emailing charter.schools@state.nm.us. Work through the form, filling in all required fields and attachments (denoted by "*"). Be sure to save your work, even if you aren't prepared to submit your form, so that you do not lose your data. Request must be provided within 30 days of making any change.

Form Fields

Field	Instructions
School*	Identify the school for which the changes should be made.
School's New Name*	Type in the new name of the school.

Attachments

For further information regarding specific documentation requirements, see pages 6–15 of The Guide and the substantive completeness requirements found on pages 2 of these instructions.

Board Minutes*
Attach evidence that the proposed change has been approved by the Charter school board.

Administrative Completeness Review

An administratively complete request includes:

☐ Board Minutes
- Comply with Open Meeting Law
- Board aligns with what is currently on file with PEC/CSD

Substantive Completeness Review

The following checklist will be used to determine substantive completeness for this request. Each criterion (if applicable) will either be deemed acceptable or not acceptable.

Review	Criteria
Board Minutes	Board Minutes that: ☐Indicate that the request has been approved by the appropriate board and is consistent with the submitted form.

School Location Notification Request

Purpose

The *School Location Notification Request* should be completed if the Charter School needs to change physical address of the school. This request **must** be submitted *prior* to the physical move.

It is not necessary to file this request to change the school's phone/fax number(s) on file with the PEC/CSD; rather, the school's head administrator should email the new information to charter.schools@state.nm.us.

Determining Eligibility

Any Charter school is eligible to submit a *School Location Notification Request* as long as the school is not moving out of the current school district in which it is located and into a different school district.

If the school is requesting to move into a different school district, the school must first, with the participation of the PEC, hold a community input hearing in the district in which the school is seeking to locate.

PEC Consideration

If moving the physical address of a school **within the same school district** as its current location, a substantively complete notification request may be placed on the consent agenda of a regular PEC meeting.

If moving the physical address i**nto a different school district**, a substantively complete notification shall be placed on the agenda of a regular PEC meeting.

Instructions for the Request

If you have questions about completing the form or uploading documents, contact the Charter Schools Division by emailing charter.schools@state.nm.us. Work through the form, filling in all required fields and attachments (denoted by "*"). Be sure to save your work, even if you aren't prepared to submit your form, so that you do not lose your data.

Form Fields

Field	Instructions
Current Address, Phone Number, and Fax Number	Identify the current school address, phone number, and fax number.
Effective Date of Change*	Identify the date on which the change is intended to be implemented.
New Physical Address	Identify the new address at which the school will be operating, including the street address, city, state, zip, phone, and fax number. If complete address is not available, please provide cross streets or parcel number.

| **New Mailing Address** | If this information is the same as the physical address, check the "Same as new physical address" box. If not, identify the new address at which the school will be receiving mail, including the street address, city, state, zip, phone, and fax number. |

Attachments

For further information regarding specific documentation requirements, see pages 6–15 of The Guide and the substantive completeness requirements found on pages 4–6 of these instructions.

Board Minutes*

Attach evidence that the proposed change has been approved by the Charter school board.

Occupancy Documentation*

For the proposed facility, clearly label and provide the following documents:

- A Certificate of Occupancy, approved for educational use;
- NMCI letter from the PSFA;
- Documentation of the capacity load of the facility to document capacity that can sustain enrollment requested for new school or school site (hand-drawn images will not be accepted); and
- Lease (as relevant), lease purchase agreement (as relevant), or purchase contract (as relevant) and an affidavit verifying compliance with legal requirements.

Copy of Liability Insurance Coverage*

Attach appropriate documentation, which must identify the charter school requesting the move and agreement to provide coverage at the proposed site.

Narrative

Upload a narrative that responds to the following prompts:

☐ Provide the rationale for moving the school to a new location.

☐ Provide a detailed description of how the Charter school will meet the enrollment targets identified in each Enrollment Matrix submitted. Include the following:

- o A plan for meeting targets;
- o Necessary advertising and/or promotion to meet the targets;
- o Timeline for enrollment at the school for which the request has been submitted and explains the process for communicating to the public.

☐ Provide a description of the market analysis that supports the successful enrollment of the projected student count. Include the following:

- o Other educational options available to students in the target area;
- o An explanation of need for the school; and
- o Factual data to support the need.

☐ (If the school is moving **more than** 5 miles from its current location) Discuss the percentage of students from the previous location that have committed to/are projected to remain enrollment at the new location. Include the following:

- o The percent of students that the Charter school projects will remain enrolled at the school

after relocation;

- o The factual data that supports this projection; and
- o The plan for ensuring the transition of these students to the new location.

☐(If the school is moving **more than** 5 miles from its current location) Identify the target population the school will serve at the proposed location. Demonstrate a clear understanding of the following:

- o The students the school intends to serve;
- o How the population is similar to, or different from, the population currently served by the school(s) operating under the charter;
- o Whether the students will be primarily neighborhood or commuter;
- o A demographic profile of the population; and
- o Current level of academic performance for nearby schools.

Additional Information

- • **Enrollment Matrix**

  Complete for each school operated by the charter, detailing the current and targeted number of students served per grade for the subsequent three Fiscal Years. Additionally, complete the matrix for the proposed school for its first three years.

Administrative Completeness Review

An administratively complete request includes:

- ☐ Board Minutes
  - • Comply with Open Meeting Law
  - • Board aligns with what is currently on file with PEC/CSD
- ☐ Occupancy Documentation
  - • Certificate of Occupancy, approved for educational use; and
  - • Documentation of the capacity load of the facility to document capacity that can sustain enrollment requested for new school or school site (hand-drawn images will not be accepted.
- ☐ NMCI letter from the PSFA
- ☐ Lease (as relevant), lease purchase agreement (as relevant), or purchase contract (as relevant) and an affidavit verifying compliance with legal requirements
- ☐ Copy of liability insurance coverage
- ☐ Completed Enrollment Matrix
- ☐ Narrative, addressing all prompts

Substantive Completeness Review

The following checklist will be used to determine substantive completeness for this request. Each criterion (if applicable) will either be deemed acceptable or not acceptable.

Review	Criteria
Board Minutes	Board Minutes that: ☐Indicate that the request has been approved by the appropriate board and is consistent with the submitted form

Occupancy Documentation	☐The Certificate of Occupancy demonstrates the facility for the proposed school is approved for E Occupancy. ☐ Documentation to demonstrate sufficient capacity for requested enrollment cap for new school or school site. ☐The NMCI for facility for proposed school meets statutory requirements
Lease Agreement, Lease Purchase Agreement, or Purchase Contract	☐Documentation demonstrates an agreement for the proposed facility that complies with statutory requirements. ☐Affidavit is complete and raises no substantial concerns
Liability Insurance Coverage	☐Copy of current insurance policy with school's name as policyholder/insured and agreement to provide coverage at proposed location.
Enrollment Matrix	☐An Enrollment Matrix is completed for the current and subsequent three Fiscal Years. ☐ Enrollment Matrix is consistent with information contained in all applicable narrative prompts and accompanying attachments.

Enrollment Targets (Narrative)	☐Description of enrollment is consistent with the targets identified in each Enrollment Matrix submitted.
	
	☐Description includes the following:
	
	    ☐A plan for meeting targets; and
	
	    ☐Necessary advertising and/or promotion to meet the targets.
	
	    ☐Timeline for enrollment at the school for which the request has been submitted is included and explains the process for communicating to the public.
	
	☐Description of the market analysis, to include the following:
	
	    ☐Other educational options available to students in the target area;
	
	    ☐An explanation of need for the school; and
	
	    ☐Factual data to support the need.
	
	☐Enrollment Justification is consistent with the information contained in all applicable narrative prompts and accompanying attachments.

Rationale (Narrative)	Description includes the following: ☐Rationale for relocating the school; and ☐Rationale is consistent with information contained in all applicable narrative prompt responses and accompanying attachments.

Reenrollment Percentage (Narrative—More than 5 miles only)	Response includes the following: ☐The percent of students that the Charter school projects will remain enrolled at the school after relocation; ☐The factual data that supports this projection; and ☐The plan for ensuring the transition of these students to the new location.
Target Population (Narrative—More than 5 miles only)	Response includes the following: ☐Identification of the target population; ☐How the target population is similar to, or different from, the current population served by the charter; and ☐ A specific statement of the population as primarily neighborhood or commuter students. Response provides the target population's: ☐Demographic profile; and ☐Current levels of academic performance (e.g. PARCC information and letter grades).

☐Target population information is consistent with information contained in all other applicable narrative prompts and accompanying attachments.

Performance Framework Academic Goal Notification

Purpose

The *Performance Framework Academic Goal Notification* is used to notify the PED of a change to the interim assessment (short cycle assessment) used to measure school specific Academic Performance Framework Goals. The request must be submitted timely so that it may be processed within the timeframe provided in the PEC policy and implemented no later than the first month of the next school year (consideration at the August meeting is the latest possible consideration for an amendment to become effective in the current fiscal year).

Determining Eligibility

Any Charter School may submit a *Performance Framework Academic Goal Amendment Request*. However, a charter school may submit no more than one such request over the term of their contract without demonstrating that the change was cause by forces outside of the school's control.

PEC Consideration

A substantively complete amendment request submitted by a Charter School will be placed on the consent agenda of the next regular Board meeting.

Instructions for the Request

If you have questions about completing the form or uploading documents, contact the Charter Schools Division by emailing charter.schools@state.nm.us. Work through the form, filling in all required fields and attachments (denoted by "*"). Be sure to save your work, even if you aren't prepared to submit your form, so that you do not lose your data

Form Fields

Field	Instructions
From*	Identify in *From* the current Academic Performance Framework Goal.
To*	Identify the revised language that is to be included in the Academic Performance Framework, which reflects the change in the interim (short cycle) assessment. This section may not be left blank. The change should not change the performance expectations, but should change only the assessment name and assessment specific terminology.

Attachments

For further information regarding specific documentation requirements, see pages 6–15 of The Guide and the substantive completeness requirements found below.

Board Minutes*
Attach evidence that the proposed change has been approved by the Charter school board.

Narrative*

Upload a narrative that responds to the following prompts:

☐ Describe the rationale for this request. It the request is prompted by forces outside of the school's control, the school must provide documentation to support this.

☐ For academic goals, explain how the school knows the new assessment is aligned to and accurately measures the New Mexico Common Core State Standards and the New Mexico Content Standards.

☐ Describe the school's transition plan, including:

- Timeframes for implementation of the changes;
- Purchasing necessary resources (e.g. assessment materials) to implement the changes;
- Training staff to effectively implement the changes; and
- Providing evaluation (monitoring) and support to address challenges encountered during the implementation of the change.

Administrative Completeness Review

An administratively complete request includes:

☐ Board Minutes
- Comply with Open Meeting Law
- Board aligns with what is currently on file with PEC/CSD

☐ Narrative, addressing all prompts

Substantive Completeness Review

The following checklist will be used to determine substantive completeness for this request. Each criterion (if applicable) will either be deemed acceptable or not acceptable.

Review	Criteria
Board Minutes	Board Minutes that: ☐Indicate that the request has been approved by the appropriate board and is consistent with the submitted form
Rationale (Narrative)	Description includes the following: ☐Rationale for change is consistent with information contained in all applicable narrative prompt responses and accompanying attachments. ☐It the request is prompted by forces outside of the school's control, the school provides documentation to support this.
Standards Alignment (Narrative)	Description includes the following: ☐How the school knows the assessment is aligned to and accurately measures the New Mexico Common Core State Standards and the New Mexico Content Standards ☐Described alignment is consistent with information contained in all applicable narrative prompt responses.

Transition Plan (Narrative)	Description of the transition plan , including the following:
	☐Timeframes for implementation of the changes;
	☐Purchasing necessary resources to implement the described changes;
	☐Training staff to effectively implement the changes; and
	☐Providing evaluation (monitoring) and support to address challenges encountered during the implementation of the change.
	☐Transition plan is consistent with information contained in all applicable narrative prompt responses and accompanying attachments.

Change in Grades Served Notification Request

Purpose

The *School Specific Change in Grades Served Notification Request* is used to increase or decrease the grades served at a charter school, without changing the grade levels the school is approved to serve under the contract.

Determining Eligibility

Any charter school that would like to serve grade levels it is approved to serve, but not currently serving is eligible to submit a *Change in Grades Served Notification Request*. Any charter school that would like to stop serving grade levels it is approved to serve, but does not want to make a permanent change to its contract is eligible to submit a *Change in Grades Served Notification Request*.

PEC Consideration

A substantively complete notification request submitted by a charter holder will be placed on the consent agenda of a regular PEC meeting.

Instructions for the Request

If you have questions about completing the form or uploading documents, contact the Charter Schools Division by emailing charter.schools@state.nm.us. Work through the form, filling in all required fields and attachments (denoted by "*"). Be sure to save your work, even if you aren't prepared to submit your form, so that you do not lose your data.

Form Fields

Field	Instructions
Grade Levels Approved to be Served under the Contract *	Identify the grade levels the school is authorized to serve in its contract.
Current Grades Served	Confirm the current grades served at the school.
New Grade Levels Served*	Identify the grades to be served after approval of the request.
Effective Date*	Enter the proposed first day of school for the new grades. (This change cannot occur mid-year.)

Attachments

For further information regarding specific documentation requirements, see pages 6–15 of The Guide and the substantive completeness requirements found on pages 2–4 of these instructions.

Board Minutes*

Attach evidence that the proposed change has been approved by the Charter school board.

Narrative*

Upload a narrative that responds to the following prompts:

☐ (Decrease and Increase) Provide the rationale for the change in grade levels served at this school.

☐ (Decrease Only) Identify the number of students displaced by the decrease in grades.

☐ (Decrease Only) Discuss the plan to communicate the decrease in grades to the school community, including providing students with:

- Identifying other educational options; and
- Enrolling in another school

☐ (Increase Only) Provide a detailed description of how the Charter Holder will meet the enrollment targets identified in the Enrollment Matrix. Include the following:

- A plan for meeting targets;
- Necessary advertising and/or promotion to meet the targets;
- Number of returning students; and
- Anticipated new student enrollment.

☐ (Increase Only) Provide a detailed staffing plan consistent with each Staffing Chart submitted with this request. Describe how the staffing (administrative, instructional, and non-instructional), enrollment, and target population needs will be addressed by the following processes:

- Recruitment;
- Hiring; and
- Training.

☐ If changes to staffing are not needed, provide an explanation.

Facility Documentation (Increase Only)

For the proposed facility, clearly label and provide the following documents:

- Documentation of the capacity load of the facility to document capacity that can sustain projected growth in enrollment based on grade level growth. Hand-drawn images will not be accepted.

Additional Information (Increase Only)

Upload each of the following documents:

- Enrollment Matrix
  - Complete for the school for which the request is being submitted, detailing the current and targeted number of students served per grade for the subsequent three Fiscal Years.
- Staffing Chart
  - Complete for the school for which the request is being submitted, identifying the current and anticipated staffing information for the subsequent three Fiscal Years.
- Additional Facility Documentation (See above)

Administrative Completeness Review

An administratively complete request includes the following:

☐ Board Minutes
   - Comply with Open Meeting Law
   - Board aligns with what is currently on file with PEC/CSD
☐ Narrative, addressing all prompts
☐ For the proposed facility, clearly label and provide the following documents:
   - Documentation of the capacity load of the facility to document capacity that can sustain projected growth in enrollment based on grade level growth. Hand-drawn images will not be accepted.
☐ Completed Enrollment Matrix for the school for which the request is being submitted
☐ Completed Staffing Chart for the school for which the request is being submitted

Substantive Completeness Review

The following checklist will be used to determine substantive completeness for this request. Each criterion (if applicable) will either be deemed acceptable or not acceptable.

Review	Criteria
Board Minutes	Board Minutes that: ☐Indicate that the request has been approved by the appropriate board and is consistent with the submitted form.
Rationale (Narrative)	Description includes the following: ☐Rationale for the change in grade levels served at the school; and ☐Rationale is consistent with information contained in all applicable narrative prompt responses and accompanying attachments.
Number of Students (Narrative—Decrease Only)	☐Narrative identifies the number of students displaced by the decrease in grades.
Communication Plan (Narrative—Decrease Only)	Response includes the following: ☐Description of the plan to communicate decrease in grades to the school community

	Description of how the Charter Holder will assist displaced students with the following: ☐Identifying other options; and ☐Enrolling in another school.
Enrollment Matrix (Increase Only)	☐An Enrollment Matrix is completed for current and subsequent three Fiscal Years for the school for which the request is being submitted. ☐ The Enrollment Matrix is consistent with information contained in all applicable narrative prompts and accompanying attachments.
Enrollment Targets (Narrative—Increase Only)	☐ Description for each Enrollment Matrix includes the following: ☐Plan for meeting each year's enrollment targets; ☐Necessary advertising and/or promotion (if applicable); ☐Number of returning students; and ☐Anticipated new student enrollment ☐Enrollment narrative is consistent with information contained in all applicable narrative prompts and accompanying attachments.
Staffing Chart (Increase Only)	☐Completed Staffing Chart provided for the school for which the request is being submitted. ☐Staffing Chart is consistent with information contained in all applicable narrative prompt responses and accompanying attachments.
Staffing Plan (Narrative—Increase Only)	☐Plan describes changes to instructional, non-instructional, and administrative staff in the Staffing Chart. ☐Staffing, enrollment, and target population needs are addressed by the following processes: ☐Recruitment; ☐Hiring; and ☐Training. ☐If no changes to staffing, the plan describes why there are no needed changes. ☐Staffing Plan is consistent with the information contained in all applicable narrative prompt responses and accompanying attachments.
Occupancy Documentation (Increase Only)	☐ Documentation of the capacity load of the facility to document capacity that can sustain projected growth in enrollment based on grade level growth. Hand-drawn images will not be accepted.

Temporary Change to Overall Instructional Hours Notification

Purpose

The *Temporary Change to Overall Instructional Hours Notification* is used to notify the PEC of a temporary decrease in the number of overall annual instructional hours for one or more educational programs provided by the Charter School. This is only used to identify when the contracted instructional hours will not be met in a specific fiscal year due to unforeseen circumstances (e.g. snow, power outage, roof collapse). Note: the school must still meet the overall minimum annual instructional hours required in NMSA § 22-2-8.1, unless waived by the PED.

Determining Eligibility

Any Charter School may submit a *Temporary Change to Overall Instructional Hours Notification*. However, the school must still meet the overall minimum annual instructional hours required in NMSA § 22-2-8.1, unless waived by the PED. This may be filed after

PEC Consideration

A substantively complete Notification submitted by a Charter School will be placed on the consent agenda of a regular Board meeting.

Instructions for the Request

If you have questions about completing the form or uploading documents, contact the Charter Schools Division by emailing charter.schools@state.nm.us. Work through the form, filling in all required fields and attachments (denoted by "*"). Be sure to save your work, even if you aren't prepared to submit your form, so that you do not lose your data

Form Fields

Field	Instructions
From*	Identify in *From* the number of overall annual instructional hours approved for each educational program offered by the school in the charter contract.
To*	Enter the number of overall annual instructional hours that will be provided for each educational program offered by the school. Please note, these numbers must conform to the overall minimum annual instructional hours required in NMSA § 22-2-8.1
Fiscal Year Effective*	Enter the fiscal year for which the change will be effective.

Attachments

For further information regarding specific documentation requirements, see pages 6–15 of The Guide and the substantive completeness requirements found below.

Board Minutes*

Attach evidence that the proposed change has been approved by the Charter school board.

School Calendar*

Provide the school calendar for the fiscal year the change will be effective, clearly indicating any days using alternate daily schedules (e.g. early release days). If the school offers multiple educational programs, the school must provide a calendar for each program. If this is different from the calendar that was submitted to the PED School Budget and Financial Analysis Bureau, please provide documentation to demonstrate that the charter school has submitted the change to the Secretary and received approval of the change.

Daily Instructional Schedule(s)*

Provide daily instructional schedule(s) clearly identifying instructional and non-instructional periods, for each grade served. Include any alternate schedules (e.g. early release days) identified in the school calendar. If the school offers multiple educational programs, the school must provide daily scheduled for each program.

Narrative*

Upload a narrative that responds to the following prompts:

☐　Describe the rationale for this request.

☐　Describe how the school calendar(s) and daily instructional schedule(s) submitted demonstrate compliance with NMSA § 22-2-8.1 regarding annual instructional hours for each grade served.

Administrative Completeness Review

An administratively complete request includes:

☐　Board Minutes
- Comply with Open Meeting Law
- Board aligns with what is currently on file with PEC/CSD

☐　School Calendar(s)

☐　Daily Instructional Schedule(s)

☐　Narrative, addressing all prompts

Substantive Completeness Review

The following checklist will be used to determine substantive completeness for this request. Each criterion (if applicable) will either be deemed acceptable or not acceptable.

Review	Criteria
Board Minutes	Board Minutes that: ☐ Indicate that the request has been approved by the appropriate board and is consistent with the submitted form
School Calendar	Calendar includes the following: ☐ Current fiscal year dates, including any alternate daily schedules ☐ Calendar is provided for each educational program offered by the school

Daily Instructional Schedule(s)	Instructional schedule includes the following: ☐ Instructional and non-instructional periods for each grade level served; and ☐ Any alternate daily schedules from the school calendar. ☐ Instructional schedule is provided for each educational program offered by the school
Rationale (Narrative)	Description includes the following: ☐ Rationale for increase or decrease in instructional days
Compliance with NMSA § 22-2-8.1 (Narrative)	Description includes the following: ☐ How the school calendar and schedule(s) submitted demonstrate compliance with NMSA § 22-2-8.1

Facilities Master Plan Notification Request

Purpose

The *Facilities Master Plan Notification Request* should be completed if there is a change to the school's facilities master plan or if the school is beginning to look to change its facility or location.

Determining Eligibility

Any charter holder is eligible to submit a *Facilities Master Plan Notification Request*.

PEC Consideration

A substantively complete amendment request submitted by a Charter School will be placed on the consent agenda of a regular PEC meeting.

Instructions for the Request

If you have questions about completing the form or uploading documents, contact the Charter Schools Division by emailing charter.schools@state.nm.us. Work through the form, filling in all required fields and attachments (denoted by "*"). Be sure to save your work, even if you aren't prepared to submit your form, so that you do not lose your data. Request must be provided within 30 days of making any change.

Form Fields

Field	Instructions
Notification*	Identify if the school has changed its facilities master plan or if the school is looking to change facility or location.
Date of Change*	Identify the anticipated effective date of any planned or considered facility change.

Attachments

For further information regarding specific documentation requirements, see pages 6–15 of The Guide and the substantive completeness requirements found on page 3 of these instructions.

Board Minutes*
Attach evidence that the proposed change has been approved or discussed by the charter school board.

Facility Plan

Attached the school's facility master plan.

Administrative Completeness Review

An administratively complete request includes the following:

☐   Board Minutes
- Comply with Open Meeting Law
- Board aligns with what is currently on file with PEC/CSD

☐ Facility Plan

Substantive Completeness Review

The following checklist will be used to determine substantive completeness for this request. Each criterion (if applicable) will either be deemed acceptable or not acceptable.

Review	Criteria
Board Minutes	Board Minutes that: ☐Indicate that the request has been approved by the appropriate board and is consistent with the submitted form.

Lease Terms or Facility Ownership Notification Request

Purpose

The *Lease Terms or Facility Ownership Notification Request* should be completed if the Charter School's lease terms have changed or if the ownership of the facility in which the charter school is located has changed.

Determining Eligibility

Any Charter school is eligible to submit a *Lease Terms or Facility Ownership Notification Request* as long as the school is not moving out of the current school district in which it is located and into a different school district.

PEC Consideration

A substantively complete amendment request submitted by a Charter School will be placed on the consent agenda of a regular PEC meeting.

Instructions for the Request

If you have questions about completing the form or uploading documents, contact the Charter Schools Division by emailing charter.schools@state.nm.us. Work through the form, filling in all required fields and attachments (denoted by "*"). Be sure to save your work, even if you aren't prepared to submit your form, so that you do not lose your data. Request must be provided within 30 days of making any change.

Form Fields

Field	Instructions
Item Changed	Identify the change that has occurred (Facility ownership or lease terms).
Effective Date of Change*	Identify the date on which the change became effective

Attachments

For further information regarding specific documentation requirements, see pages 6–15 of The Guide and the substantive completeness requirements found on pages 4–6 of these instructions.

Board Minutes*
Attach evidence that the proposed change has been approved by the Charter school board.

Facility Compliance Documentation*

For the proposed facility, clearly label and provide the following documents:

- Lease (as relevant), lease purchase agreement (as relevant), or purchase contract (as relevant) and an affidavit verifying compliance with legal requirements.

Narrative

Upload a narrative that responds to the following prompts:

☐ Provide the rationale for the change, if the lease terms changed.

☐ If the facility ownership changed, please identify the individuals, corporate members, partners, principals or owners who are associated with the new owner.

Administrative Completeness Review

An administratively complete request includes:

☐ Board Minutes
- Comply with Open Meeting Law
- Board aligns with what is currently on file with PEC/CSD

☐ Lease (as relevant), lease purchase agreement (as relevant), or purchase contract (as relevant) and an affidavit verifying compliance with legal requirements

☐ Narrative, addressing all prompts

Substantive Completeness Review

The following checklist will be used to determine substantive completeness for this request. Each criterion (if applicable) will either be deemed acceptable or not acceptable.

Review	Criteria
Board Minutes	Board Minutes that: ☐ Indicate that the request has been approved by the appropriate board and is consistent with the submitted form
Lease Agreement, Lease Purchase Agreement, or Purchase Contract	☐ Documentation demonstrates an agreement for the proposed facility that complies with statutory requirements. ☐ Affidavit is complete and raises no substantial concerns
Rationale (Narrative)	Description includes the following: ☐ Rationale for the change in lease termsl; and ☐ Rationale is consistent with information contained in all applicable narrative prompt responses and accompanying attachments.
Ownership (Narrative)	Response includes the following: ☐ Individuals, corporate members, partners, principals or owners who are associated with the new owner.

Lease Terms or Facility Ownership Notification Request	
Target Population **(Narrative—More than 5 miles only)**	Response includes the following: ☐Identification of the target population; ☐How the target population is similar to, or different from, the current population served by the charter; and ☐ A specific statement of the population as primarily neighborhood or commuter students. Response provides the target population's: ☐Demographic profile; and ☐Current levels of academic performance (e.g. PARCC information and letter grades).

☐Target population information is consistent with information contained in all other applicable narrative prompts and accompanying attachments.

Admission or Lottery Policies or Procedures Notification Request

Purpose

The *Admission or Lottery Policies or Procedures Notification Request* should be completed if there is a change to any school admission or lottery policies or procedures policies.

Determining Eligibility

Any charter holder is eligible to submit an *Admission or Lottery Policies or Procedures Notification Request*.

PEC Consideration

A substantively complete amendment request submitted by a Charter School will be placed on the consent agenda of a regular PEC meeting. However, if a review by PED staff indicates there is a compliance concern or issue with the proposed revision may result in a delay of consideration or may result in the matter being brought to the attention of the PEC.

Instructions for the Request

If you have questions about completing the form or uploading documents, contact the Charter Schools Division by emailing charter.schools@state.nm.us. Work through the form, filling in all required fields and attachments (denoted by "*"). Be sure to save your work, even if you aren't prepared to submit your form, so that you do not lose your data. Request must be provided within 30 days of making any change.

Form Fields

Field	Instructions
Date of Change*	Identify the effective date of the change and the vote to implement the change.

Attachments

For further information regarding specific documentation requirements, see pages 6–15 of The Guide and the substantive completeness requirements found on page 3 of these instructions.

Board Minutes*

Attach evidence that the proposed change has been approved by the charter school board.

Revised Policy

Attached the revised policy or by-laws.

Narrative*

Upload a narrative that responds to the following prompts:

☐ Describe the rationale for this request.

☐ Describe the impact the change will have on student enrollment and admission.

Administrative Completeness Review

An administratively complete request includes the following:

☐ Board Minutes
  - Comply with Open Meeting Law
  - Board aligns with what is currently on file with PEC/CSD
☐ Revised Policy
☐ Narrative, addressing all prompts

Substantive Completeness Review

The following checklist will be used to determine substantive completeness for this request. Each criterion (if applicable) will either be deemed acceptable or not acceptable.

Review	Criteria
Board Minutes	Board Minutes that: ☐ Indicate that the request has been approved by the appropriate board and is consistent with the submitted form.
Revised Policy	☐ If reviewed for substance by PED, the policy complies with legal requirements.
Rationale (Narrative)	Description includes the following: ☐ Rationale for the change; and ☐ Rationale is consistent with information contained in all applicable narrative prompt responses and accompanying attachments.
Impact (Narrative)	Description includes the following: ☐ Impact of the change that is not discriminatory and does not impse admission requirements; and ☐ Impact is consistent with information contained in all applicable narrative prompt responses and accompanying attachments.

Insurance Coverage Notification Request

Purpose

The *Insurance Coverage Notification Request* should be completed if the Charter School's insurance coverage amounts or types have changed.

Determining Eligibility

Any Charter school is eligible to submit an *Insurance Coverage Notification Request*.

PEC Consideration

A substantively complete amendment request submitted by a Charter School will be placed on the consent agenda of a regular PEC meeting.

Instructions for the Request

If you have questions about completing the form or uploading documents, contact the Charter Schools Division by emailing charter.schools@state.nm.us. Work through the form, filling in all required fields and attachments (denoted by "*"). Be sure to save your work, even if you aren't prepared to submit your form, so that you do not lose your data. Request must be provided within 30 days of making any change.

Form Fields

Field	Instructions
Item Changed	Identify the change that has occurred (Decrease or Increase in Coverage Amounts, Addition or Elimination of Coverage Type).
Effective Date of Change*	Identify the date on which the change became effective

Attachments

For further information regarding specific documentation requirements, see pages 6–15 of The Guide and the substantive completeness requirements found on pages 4–6 of these instructions.

Board Minutes*
Attach evidence that the proposed change has been approved by the Charter school board.

Copy of Current Liability Insurance Coverage*

Attach the appropriate documentation, which must identify the charter school as the insurance policy holder.

Narrative

Upload a narrative that responds to the following prompts:

☐ Provide the rationale for the change, if the lease terms changed.

Administrative Completeness Review

An administratively complete request includes:

☐ Board Minutes
- Comply with Open Meeting Law
- Board aligns with what is currently on file with PEC/CSD

☐ Copy of Current Liability Insurance Coverage

☐ Narrative, addressing all prompts

Substantive Completeness Review

The following checklist will be used to determine substantive completeness for this request. Each criterion (if applicable) will either be deemed acceptable or not acceptable.

Review	Criteria
Board Minutes	Board Minutes that: ☐ Indicate that the request has been approved by the appropriate board and is consistent with the submitted form
Copy of Current Liability Insurance Coverage	☐ Documentation demonstrates charter school as the insurance policy holder. ☐ Is consistent with information contained in all applicable narrative prompt responses and accompanying attachments
Rationale (Narrative)	Description includes the following: ☐ Rationale for the change; and ☐ Rationale is consistent with information contained in all applicable narrative prompt responses and accompanying attachments.

	☐Target population information is consistent with information contained in all other applicable narrative prompts and accompanying attachments.

Food or Transportation Services Notification Request

Purpose

The *Food or Transportation Services Notification Request* should be completed if there is a change to the Food or Transportation Services offered by the school.

Determining Eligibility

Any charter holder is eligible to submit a *Food or Transportation Services Notification Request*.

PEC Consideration

A substantively complete amendment request submitted by a Charter School will be placed on the consent agenda of a regular PEC meeting.

Instructions for the Request

If you have questions about completing the form or uploading documents, contact the Charter Schools Division by emailing charter.schools@state.nm.us. Work through the form, filling in all required fields and attachments (denoted by "*"). Be sure to save your work, even if you aren't prepared to submit your form, so that you do not lose your data. Request must be provided within 30 days of making any change.

Form Fields

Field	Instructions
Current Services Offered*	Identify the current food and/or transportation services that are offered by the school
Change*	Identify the changes that will be made to the food and/or transportation services that are offered by the school
Date of Change*	Identify the effective date of the change and the vote to implement the change.

Attachments

For further information regarding specific documentation requirements, see pages 6–15 of The Guide and the substantive completeness requirements found on page 3 of these instructions.

Board Minutes*

Attach evidence that the proposed change has been approved by the charter school board.

Narrative*

Upload a narrative that responds to the following prompts:

☐ Describe the rationale for this request.

☐ (Decrease/Elimination Only) Identify the number of students that will be displaced and/or impacted by the change.

☐ (Decrease/Elimination Only) Describe the plan to communicate the change to the school community.

☐ (Decrease/Elimination Only) Describe the plan to provide displaced and/or impacted students assistance with

- o Food and/or transportation needs
- o Identifying other educational options; and
- o Enrolling in another school.

Administrative Completeness Review

An administratively complete request includes the following:

☐ Board Minutes
- Comply with Open Meeting Law
- Board aligns with what is currently on file with PEC/CSD

☐ Narrative, addressing all prompts

Substantive Completeness Review

The following checklist will be used to determine substantive completeness for this request. Each criterion (if applicable) will either be deemed acceptable or not acceptable.

Review	Criteria
Board Minutes	Board Minutes that: ☐Indicate that the request has been approved by the appropriate board and is consistent with the submitted form.
Rationale (Narrative)	Description includes the following: ☐Rationale for the change; and ☐Rationale is consistent with information contained in all applicable narrative prompt responses and accompanying attachments.

Impact (Narrative)	Description includes the following:
	☐Number of students that will be displaced and/or impacted by the change
	☐Plan to communicate the change to the school community
	☐Plan to provide displaced and/or impacted students assistance with.
	    ☐ Food and/or transportation needs
	    ☐ Identifying other educational options; and
	    ☐ Enrolling in another school.

Curriculum Sample Instructions and Template

Who needs to use this form?
Charter schools with a current letter grade of "C".

Why?
Curriculum samples provide a representation of a Educational Program aligned to the New Mexico Common Core State Standards and the New Mexico Content Standards and to the methods of instruction described in the charter contract, and as amended. The curriculum samples allow the Charter school to demonstrate its capacity to develop a curriculum aligned to these standards and designed to improve pupil academic achievement.

Directions

For each grade level being added, provide curriculum samples for Reading, Writing, and Math using the Curriculum Sample Template. Reading and Writing standards may be addressed in a single English Language Arts (ELA) curriculum sample. If requesting 4th, 7th, and/or 11th grade, provide a Science curriculum sample.

How many pages can a curriculum sample have?
Each curriculum sample addressing a single content area may not exceed 8 pages. If the Reading and Writing curriculum samples for a grade level are submitted as a single ELA curriculum sample, the ELA curriculum sample may not exceed 12 pages. The 8 page limitation (or 12 page limitation for an integrated ELA sample) includes the completed curriculum sample template fields, summative assessment items, and scoring information included for review.

Which standards may be used?
Each curriculum sample must address at least one standard from a content area (Reading, Writing, Math, or Science) for the grade level requested. If more than one standard is addressed in a curriculum sample, indicate one standard that is instructed and assessed to mastery to be **the focus of review** by putting **(M)** before the standard number.

    Reading—Each Reading/ELA curriculum sample must identify as the focus of review one standard from the Reading strand (either Reading for Literature or Reading for Informational Text), **not** to include RL.10 or RI.10, OR one of the additional 15% of state-specific standards in ELA which focus on cultural responsiveness.

    Writing—Each Writing/ELA curriculum sample must identify as the focus of review one standard from the Writing strand (Text Types and Purposes only—**W.1, W.2, or W.3**) OR one of the additional 15% of state-specific standards in ELA which focus on cultural responsiveness.

    Mathematics—Each Mathematics curriculum sample must identify one standard from Mathematics to be the focus of review, along with the Standard(s) for Mathematical Practice addressed by the instructional strategies and student activities in the curriculum sample. Standards for Mathematical Practice may not be the focus of review, but should be identified by number when addressed in the instructional strategies and student activities. If any high school grade (9–12) is to be added, the Charter school will provide four curriculum samples representing the four State required high school courses in Mathematics (Algebra, Geometry, Algebra II or its equivalent, and an additional course with significant math content).

Science—A Science curriculum sample must be submitted for charters requesting addition of 4th, 7th, and/or 11th grade. Each Science curriculum sample must identify one performance standard (PS) from a Science strand (Strands 2–3 only). Strand 1 (Scientific thinking and practice) may not be the focus of review, but should be identified by number when addressed in the instructional strategies and student activities.

What about standards with several components?

Each curriculum sample must provide instruction and student activities sufficient to allow a student the opportunity to master the standard identified for review; with assessment items and scoring sufficient to allow that student to clearly demonstrate mastery. Certain standards include multiple components that describe an amount of content and/or skill knowledge that might be difficult to fully address within the page limitations described above.

If the standard has **two or fewer components** identified by lower-case letter (e.g. 3.NF.2 below), the sample must address the **complete** standard including the **overall broad standard description** (<u>double underlined</u> below) and **all components**.

(M) 3.NF.2: <u>Understand a fraction as a number on the number line; represent fractions on a number line diagram.</u>

  a. Represent a fraction $1/b$ on a number line diagram by defining the interval from 0 to 1 as the whole and partitioning it into b equal parts. Recognize that each part has size $1/b$ and that the endpoint of the part based at 0 locates the number $1/b$ on the number line.

  b. Represent the fraction a/b on a number line by marking off a lengths $1/b$ from 0. Recognize the resulting interval has size a/b and that its endpoint locates the number a/b on the number line.

If the standard includes **more than two components** identified by lower-case letter (e.g. 4.W.1 below), the Charter school is required to address the **overall broad standard description** (<u>double underlined </u>below) and **not fewer than two components** (e.g. 4.W.1, b. and d., <u>underlined </u>below). The components identified for review must address grade-level rigor (see **What is rigor?** below).

(M) 4.W.1 <u>Write opinion pieces on topics or texts, supporting a point of view with reasons and information.</u>

  a. Introduce a topic or text clearly, state an opinion, and create an organizational structure in which related ideas are grouped to support the writer's purpose.

  b. <u>(**M**) Provide reasons that are supported by facts and details.</u>

  c. Link opinion and reasons using words and phrases (e.g., for instance, in order to, in addition).

  d. <u>(**M**) Provide a concluding statement or section related to the opinion presented.</u>

What is rigor?

For the **Reading and Writing** curriculum samples, the requirements include addressing the grade-level rigor defined by the listed standard. For the purposes of this request, **grade-level rigor** is the expectation set by New Mexico's Common Core State Standards and New Mexico's Content Standards

that includes a level of content and/or skills the student must master at that grade level. The increased rigor at each grade level can be identified by the changes in the standard description from the same standard at the prior grade level.

For the **Mathematics** curriculum samples, the requirements include addressing the grade-level rigor defined by the listed standard. For the purposes of this request, **grade-level rigor** is the expectation set by New Mexico's Common Core State Standards and New Mexico's Content Standards that includes a level of conceptual understanding, procedural skill and fluency, and application the student must master at that grade level, as defined by the standard description.

Administrative Completeness Checklist

An administratively complete curriculum sample includes the following:

☐	Page Limits • Each curriculum sample must be no more than **8 pages total**. The page limit increases to 12 pages total when combining Reading and Writing into one integrated ELA curriculum sample.
☐	Template • The attached Curriculum Sample Template must be used for all curriculum sample submissions.
☐	Fonts • Fonts must be no less than **10 point**.
☐	Grade Level • The curriculum sample must identify the grade level of that sample.
☐	Content Area • The curriculum sample must identify the content area of that sample.
☐	Course Title (if requesting any grade(s) between 9–12) • The course title must be provided.
☐	Alignment to Educational Program • Describe how the instructional methods found in the lesson(s) align to the Educational Program described in the charter contract and as amended.

☐	Standard identified to be the focus of review
	    • Include Standard number.
	    • If lesson(s) address(es) more than one standard or standard includes multiple components, refer to **What standards may be used?** or **What about standards with several components**? above.
	    • The focus of review is designated with the bolded **(M)**.
	    • **Reading**: one standard from the Reading strand (either Reading for Literature or Reading for Informational Text), **not** to include RL.10 or RI.10, OR one of the additional 15% of state-specific standards in ELA which focus on cultural responsiveness.
	    • **Writing**: one standard from the Writing strand (Text Types and Purposes only—**W.1, W.2, or W.3**), OR one of the additional 15% of state-specific standards in ELA which focus on cultural responsiveness.
	    • **Mathematics**: one standard from Mathematics to be the focus of review, along with the Standard(s) for Mathematical Practice addressed by the instructional strategies and student activities in the curriculum sample. Standards for Mathematical Practice may not be the focus of review, but should be identified by number when addressed in the instructional strategies and student activities. If any high school grade (9–12) is to be added, the Charter school will provide four curriculum samples representing the four State required high school courses in Mathematics (Algebra, Geometry, Algebra II or its equivalent, and an additional course with significant math content).

☐	Full description of standard identified as the focus of review
☐	List of Materials and Resources required
☐	Description of Instructional Strategies and Student Activities by lesson
☐	A minimum of three Summative Assessment Items for each of the following content areas—Reading, Writing, Mathematics, and Science (if applicable)
☐	The answer key or scoring rubric (whichever applicable) for each Summative Assessment Item including point values and how points will be awarded
☐	An acceptable score indicating mastery of the standard for review

Substantive Completeness Checklist

A substantively complete curriculum sample template will do the following:

☐	**Instructional Strategies** • Describe the Instructional Strategies, lesson by lesson, that would clearly provide students with opportunities to engage in the grade-level rigor defined in the standard identified as the focus of review.
☐	Student Activities • Describe the Student Activities, lesson by lesson, that would clearly provide students with opportunities to engage in the grade-level rigor, defined in the standard identified as the focus of review.
☐	Summative Assessment Items • Provide an opportunity for students to complete the Summative Assessment Items. These Summative Assessment Items are assessed independently and are separate from instruction and guided or independent practice.
☐	Summative Assessment Items • Provide at least three Summative Assessment Items for each content area—Reading, Writing, Mathematics, and Science (if applicable) • Answer key(s) and/or scoring rubric(s), clearly describing, for each Summative Assessment Item, components to be scored and how points will be awarded, that taken together accurately measure student mastery of the application of the content and/or skills as defined by the grade-level rigor in the standard identified for review. • Mastery of the application of the content and/or skills as defined by the grade-level rigor in the standard identified for review is clearly demonstrated by an identified acceptable score or combination of identified acceptable scores.
☐	Educational Program • Provide Instruction, Student Activities, and Summative Assessment Items that are clearly consistent with Educational Program outlined in the charter contract and as amended.

Curriculum Sample Template—8 Pages Max. (12 pages for integrated ELA sample). **Instruction Pages above should be deleted before submission.**

Grade Level		Content Area	
Course Title (grades 9–12 Only)			
Alignment to Program of Instruction *Describe how the methods of instruction found in this sequence of lessons align to the Program of Instruction described in the charter contract and as amended.*			
Standard Number and Description *The standard number and description (see instructions) of the standard being instructed and assessed to mastery in the curriculum sample. If more than one Standard is listed for a content area,* **one is clearly identified as the focus of review** *by having* **(M)** *before the standard number.*			
Materials/Resources Needed *List all items the teacher and students will need for the entire sequence of instruction (excluding common consumables).*			

Lesson (add as needed)	Instructional Strategies—*Describe the Instructional Strategies, lesson by lesson, that would clearly provide students with opportunities to engage in the grade-level rigor defined by the Standard identified as the focus of review.*	Student Activities—*Describe the Student Activities, lesson by lesson, that would clearly provide students with opportunities to engage in or master the grade-level rigor defined by the standard identified as the focus of review.* *Indicate alignment of Student Activities to the standard/component identified as the focus of review and specific Standard(s) of Mathematical Practice.*
1		
2		
3		
4		
S.A.	*Provide an opportunity for students to complete the Summative Assessment Items. These Summative Assessment Items are assessed independently and are separate from instruction and guided or independent practice. In the Student Activities column, describe the Summative Assessment Items that will allow students to demonstrate mastery of the rigor of the standard/components identified as the focus of review, and the context in which the items will be administered.*	

Summative Assessment Items and Scoring:

Provide below, at least three Summative Assessment Items for each content area, with answer key(s) and/or scoring rubric(s), clearly describing, for each Summative Assessment Item, components to be scored and how points will be awarded, that together accurately measure student mastery of the application of the content and/or skills as defined by the grade-level rigor in the standard identified for review. Mastery of the application of the content and/or skills as defined by the grade-level rigor in the standard identified for review is clearly demonstrated by an identified acceptable score or combination of identified acceptable scores.