

**SUBJECT**

Heritage Community Charter School Annual Update

**APPLICABLE STATUTE, RULE, OR POLICY**

I.C. §33-5209(2)

**BACKGROUND**

Heritage Community (HCCS) is a public charter school approved by the Public Charter School Commission (PCSC) and located in Caldwell since 2011. During the 2011-12 school year, HCCS experienced extensive operational, academic, and leadership problems. The high school pilot program was eliminated at the end of the school year, and a new administrator was hired effective in July 2012.

**DISCUSSION**

HCCS will provide an update on the status of the school.

ACADEMICS

HCCS's MSES are written to allow the school two years of operation before meeting targets, so comparative analysis has not been completed to date. However, HCCS did provide information regarding progress toward targets for which the school will be held accountable at the end of the 2012-2013 school year.

In 2011-2012, HCCS met AYP targets for reading and language, but did not meet AYP for math. The school is in Alert status for NCLB Improvement, and has been identified as a focus school.

The school's [Star Rating](#) for the 2011-12 school year is 2 out of 5. The Achievement category reflects a fairly high percentage of students performing at proficient or advanced in reading (86.3%) on the spring 2012 ISAT, and slightly lower proficiency rates for the other subjects: 73.4% in math and 75.3% in language.

HCCS's Growth to Achievement results are more concerning. The school met the Adequate Growth Percentile (AGP) in reading and language. However, the low point assignments (2/5) indicate that although a sufficient percentage of students are on-track to achieve proficiency within three years or by 10<sup>th</sup> grade, whichever comes first, the majority of HCCS students did not grow as much as their academic peers.

The school did not meet the AGP in math. The point assignment of 1/5 reveals that most HCCS students did not grow as much as their academic peers and the rate of growth will need to improve in order for the typical HCCS student to reach proficiency in math within 3 years or by 10<sup>th</sup> grade.

HCCS students in the At-Risk Subgroup had similar, though slightly poorer, growth results as the full school population. AGP was met in reading, but not in math or language. The rate of growth in math and language is slow and inadequate. In both of these subjects, HCCS students made less improvement than their academic peers. Additionally, while subgroup students' reading growth was adequate, it was also relatively slow.

On November 20, 2012, HCCS met with PCSC staff to discuss the school's star rating and present a plan to improve. HCCS has a new administrator, Javier Castaneda, who seems to have a strong understanding of the improvements that need to be made to HCCS's academics.

### **FINANCES**

HCCS requested an early payment from the SDE for the 2012-2013 year. This payment was calculated at 27.6 support units. However, the school is enrolled at only 23.3 support units. Because HCCS was overpaid in the early payment, the school's remaining payments for the year will be reduced. Additionally, HCCS was overpaid in 2011-2012 by approximately \$80,000, and these funds must be paid back to the SDE during FY13.

Based on HCCS's projections for the remainder of the 2012-2013 year, the school will incur a net loss of approximately \$109,000 during FY13. The school projects a positive year-end balance due to a sizeable carryover from FY12. However, FY14 projections indicate that the school anticipates using the remainder of its reserves and ending with a \$19,000 deficit.

If HCCS remains under-enrolled, it is likely the school will continue to struggle financially. The cost of leasing their current facility is likely to be unsustainable. The school's plan to establish a building fund for purchasing the facility appears unrealistic in light of the substantial net losses anticipated for FY13 and FY14.

### **IMPACT**

Pursuant to I.C. §33-5209(2), if the PCSC "has reason to believe that the public charter school has done any of the following, it shall provide the public charter school written notice of the defect and provide a reasonable opportunity to cure the defect: ...(d) Failed to demonstrate fiscal soundness. In order to be fiscally sound, the public charter school must be: (i) Fiscally stable on a short-term basis, that is, able to service all upcoming obligations; and (ii) Fiscally sustainable as a going concern, that is, able to reasonably demonstrate its ability to service any debt and meet its financial obligations for the next fiscal year."

### **STAFF COMMENTS AND RECOMMENDATIONS**

Staff recommends that the PCSC direct staff to issue to HCCS a NOD on the grounds of failure to demonstrate fiscal stability.

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Additionally, in the event that the school continues to evidence academic underperformance, the PCSC should seriously consider whether HCCS represents a viable choice for students and taxpayers.

**COMMISSION ACTION**

A motion to direct staff to issue to Heritage Community Charter School a notice of defect on the grounds of failure to demonstrate fiscal soundness as defined by Section §33-5209(2)(d), Idaho Code.

Moved by \_\_\_\_\_ Seconded by \_\_\_\_\_ Carried Yes \_\_\_\_\_ No \_\_\_\_\_

**Idaho Public Charter School Commission  
Site Visit Report**

School	Heritage Community Charter School (HCCS)
Address	1803 East Ustick Road, Caldwell, ID 83605
Date of Site Visit	October 11, 2012
PCSC Staff Present	Alison Henken, Charter Schools Program Manager
Board Member(s) Interviewed	Richard Hammond, Board Chair Barbara Hooper, Secretary Tamara Strikwerda, Member
Administrator(s) Interviewed	Javier Castaneda, Executive Director
Business Manager / Clerk Interviewed	Elizabeth Moore, Business Manager
Other Stakeholder(s) Interviewed	12 Students; 7 Parents

**Board Member(s) Interview**

Richard Hammond, Board Chair; Barbara Hooper, Secretary; and Tamara Strikwerda participated in the interview. The HCCS board recently reviewed the school's charter (in August 2012), and Mr. Hammond, Mrs. Hooper, and Mrs. Strikwerda demonstrated an understanding of the mission and vision of the school. They spoke about the school's core knowledge sequence, classical curriculum, and dual language program. Their goal is to have a school environment where students can develop character, a love of learning, and skills they can use in the job market.

The board members clearly described the ideal division of roles between the board and administrator, stating that the board should set policy and support the administrator without micromanaging, while the administrator should fulfill the policy and have the freedom to identify the methods that should be used to reach established end goals. The board members believe that their relationship with the new administrator, Javier Castaneda, is developing appropriately. When the position of Executive Director was vacant, the board did step into roles that they would not normally, so since Javier started, the board members have been in a process of transitioning back to being more hands-off. They believe that this process is going well, and that Javier is comfortable speaking with them if things are out of balance. They characterized their relationship with Javier as mutually respectful, positive, and honest. They feel able work together even if they disagree. They described Javier as professional and proficient, and believe that he has done well at building a rapport with students and teachers. The board spoke positively of his ability to establish rules and expectations and improve the school environment.

The Vice Chair of the HCCS board is responsible for ensuring that a brief board training item is prepared for every board meeting. However, there have been times when the board has tabled this agenda item due to time constraints, and the members who were interviewed expressed a desire to see these sessions become more frequent. The board participates in other trainings as well, including send two members to the ISBA Conference and having a two-day board retreat. Currently, the HCCS board does not have an established policy regarding board evaluation. However, Mr. Castaneda is working with the board to establish an accountability committee that will discuss establishing policies around board conduct and a formal process for the board to conduct a self-evaluation.

When asked about concerns they have about the school, the board members responded that while they were previously concerned with the school's academic performance, they feel that Mr. Castaneda understands what needs to be done and how to do it, and they believe they are headed in the right direction. Currently, their focus is on ensuring that the financial situation is clear and the school remains financially stable. When asked about their feelings on their lease agreement,

they expressed that they recognize that the payment is sizeable, and that their plan is to start a capital campaign so they can purchase the building and lower their payments.

### **Administrator(s) Interview**

Javier Castaneda, Executive Director, participated in the interview. Mr. Castaneda began his position at HCCS in July 2012. Despite this, he seems to have a strong grasp of the mission and vision of the school and an understanding of appropriate future direction for the school. Mr. Castaneda described himself as improvement-focused, and said that he looks for data and feedback before he makes decisions.

Mr. Castaneda describes his relationship with the board as positive. He feels supported by the board and feels that they are growing and becoming stronger. The board is open to learning and is pursuing training opportunities, including a year-long online training recommended to them by Mr. Castaneda. The board recently completed a training session on the appropriate division of roles and responsibilities between the board and administration, and Javier feels that they are establishing a good balance.

Academics are a focus area for the school right now, and Mr. Castaneda makes regular reports to the board about a variety of academic and other evaluation measures, including standardized tests, classroom performance measures, and parent survey results. Additionally, Javier recently led the HCCS staff through an in-depth needs assessment. Teachers and administration completed self evaluations and school evaluations and then discussed the strengths and weaknesses for the school and strategies to move forward. The results of this process were reported to the board.

When asked about areas of concern, Mr. Castaneda said he believes that HCCS is headed in the right direction, but that he wants to ensure that both academics and finances are solid. He believes the school needs more staff in order to make improvements, but wants to ensure that funds are available before making changes. In regards to academics, he identified math as the primary focus. Additionally, he feels that the school needs better methods for tracking their data so they can more quickly and easily monitor student progress. Finally, he is implementing significant professional development with teachers in an effort to ensure consistent, quality instruction and to prepare the school to implement the Common Core Standards.

### **Business Manager / Clerk Interview**

Elizabeth Moore, Business Manager, and Javier Castaneda, Executive Director, participated in a brief interview regarding finances. Elizabeth is new to the position. When asked how the school is doing financially, she said she feels that things are tight but manageable, and that she and Mr. Castaneda are in the process of doing a very close review of the finances to ensure that accounting is accurate and they have a strong understanding of the school's fiscal situation. Both Elizabeth and Javier are conservative spenders, they are being very cautious to approve any expenditures until they are confident they know what resources are available. They are also working to adjust the budget to accommodate for lower than anticipated enrollment. When asked about the size of the lease payment, Javier and Elizabeth agreed that it is significant and they are uncertain if the school can cover the cost long-term.

### **Meeting with Students**

The PCSC staff member had the opportunity to meet with twelve (12) students who participate in Student Leadership. The students were open and honest and clearly have an understanding of the schools strengths and weaknesses. When they were asked what they would like to see improved,

the students had many thoughts, ranging from the school lunch menu to much more serious topics. The following reflects some of the feedback about which students felt most strongly:

- HCCS needs new textbooks for many classes. For certain academic areas, students are working in the same book for a second year and do not feel they can be adequately challenged. For others, textbooks are old and falling apart or there are not enough books for each student to have one to use. Similarly, there are other resources (balls, supplies) that need replaced or supplemented.
- Physical education is not available at the level that students would like. Some grades may not have any PE for an entire semester, and students feel it is important that get regular physical activity.
- The study hall schedule is not consistent, and as a result, certain grades / classes have more study hall time than they need while others may not get enough. Most students expressed that they have more study time in their schedule than they need and feel the time is wasted; students feel that study hall should only be 2 times per week (rather than daily).
- Teachers who are focused heavily on the class as a whole are not effectively working with and challenging students on an individual level.
- While this has improved, students feel that the school culture in regards to student behavior requires additional work. There are students who do not respect each other or their teachers, and their poor behavior detracts from the learning environment.
- The students would like to have more opportunities for interactive, hands-on learning and field trips that are directly connected to what they are learning in class.

Finally, and most importantly, the students were asked to provide one of three answers regarding whether or not they feel challenged academically. Of the 12 students present, 0 said they feel challenged, 5 said they sometimes feel challenged, and 7 said they do not feel challenged. They did express that they felt they may be some of the more active and high performing students, but said that they felt they could be pushed to excel more than they are. Several students stated that they feel bored in some of their classes.

The students also provided feedback about the things they like about HCCS. The group was very vocal about the fact that while they feel that the school can be improved, they believe it is a strong school as a whole and that they are receiving a better education at HCCS than they have at other schools they have attended. The following reflects some of the positive feedback from students:

- The school has improved from last year (2011-2012) to this year (2012-2013). They can see that the principal and teachers want to make the school better, and they have seen positive changes happen quickly. They feel that changing from a K-12 school to a K-8 school has helped.
- Some of the teachers are really excellent. All of the teachers are willing to help students and have made it clear to students that they are available to answer questions.
- Teachers encourage students to do their best.
- The students like Mr. Castaneda and feel he is creating a positive environment at HCCS. He interacts with the students regularly, visits classrooms, and is available to help students when they need him. They described him as friendly, smart, and approachable.
- Students are excited about the addition of Latin into the curriculum. It is one of their favorite classes, and one where they feel challenged.

- The students like the classical curriculum, feel the school is headed in the right direction, and expect that in the future students will be more challenged and excel academically.

When asked if they like their school, 11 students said definitely yes, 1 said sort of, and 0 said no. The students are happy they attend HCCS and are hoping to see the school continue to grow, develop, and improve.

### **Meeting with Parents**

Seven (7) parents came to HCCS to meet with the PCSC staff member. Below are the questions presented to parents and their summarized responses:

How can HCCS improve?

- Streamline the back to school process; it seemed unorganized this year, and it would be helpful if paperwork could be combined / reduced, especially for families with multiple children enrolled.
- Make communication with parents more timely, frequent, and clear. This has improved this year, but still has room for growth. It would be helpful if the school would make sure that parents have information ahead of time through announcements (not just the school calendar). Parents recommend that the school use e-mails, Facebook, and Twitter to improve communication with HCCS families.
- It would also be helpful (perhaps through Outlook calendars or another application) for parents to be able to know what classes their students are working on so parents can better support learning at home.
- The website could be more user-friendly and could provide more resources and tools for families.
- Some students seem to be bored during study hour, especially if they are in a grade / class that includes it frequently. On the other hand, students used to have teaching assistant opportunities if they were performing well, and that has been eliminated. Perhaps offering it back for those students who don't seem to need study hour would be a better use of their time, since it builds leadership.
- The opportunities for gifted and talented students could be improved. Per one parent, "Sometimes my son is bored."
- More training on the classical curriculum and how to implement it would be helpful, as some teachers do it well, while others seem to struggle a bit.

What do you think of the dual immersion program?

- We love it.
- It would be great if there could be more language / immersion opportunities for older students. The younger grades have full immersion, but the older grades have much less time in Spanish. Students gain such strong language skills when they're young, it would be good to see it through to ensure that they maintain, and even continue to develop, those skills.

What do you think of the new administrator?

- He's approachable. He greets kids in the morning, and I think they know he really cares about them.

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- He is helping the school improve. Things are already much better than last year.
- He has already done good outreach to other community organizations (like the YMCA), which is helping to better connect the school to the surrounding community.
- He seems really open to parents volunteering at the school and is supportive of the parent organization.

What do you like about the school? Why do you have / keep your kids here?

- The teachers are great. They care about the kids and communicate with parents.
- The classical education. The school is getting close to their vision and to excellence.
- The Spanish immersion program.
- The school environment – the leadership and teachers are instilling a sense of belonging and helping students see the possibilities for their futures.
- If there is an issue, there is also a real willingness to improve.

### Documents Review

#### Finances

The finances through the 2011-2012 year were reviewed prior to the visit, and 2012-2013 year-to-date were reviewed in person. While the finances are organized and seem to be in order, one item of significant concern is the lease. The budget in the school's petition has the lease set at \$280,000 at its highest point. However, the school is currently paying over \$500,000 and has a contract providing that the lease amount will continue to increase over time. This issue was discussed with the Executive Director, Business Manager, and board, as the lease amount does not seem sustainable over time. Additionally, the school had a decrease in enrollment this year, and the budget is still being adjusted to reflect the decreased revenue as a result. These two issues in combination could leave the school facing a very challenging financial situation in FY13.

#### Special Education Files

Three (3) special education files were selected at random by the PCSC staff for review. They were organized, but were incomplete. Two of the three files were missing access logs, which clarify who can access the files and require those who do to sign the log. One of the files was missing an IEP from a previous year and the initial eligibility report, though it is possible that the previous school did not send these documents to HCCS. On the other hand, all of the files had up-to-date IEPs and clear, complete accommodations pages. The PCSC staff member recommends that HCCS review their special education files to ensure that all paperwork is included and organized and that access logs are added.

#### Additional Documents

Javier Castaneda gave the PCSC staff member access to additional documents, including the charter, newsletters, board meeting minutes, and student pledges (created by grades / classes to commit to high standards of learning, behavior, and character). These documents were very well organized and aided in providing a full picture of where HCCS is and the priorities that the board and administration have for the future.

### Classroom Observations

Due to the number of items on the visit agenda, classroom visits were briefer than is ideal. Despite this, it was clear that there is variation in the quality of teaching and classroom management from

classroom to classroom at HCCS. In some classes, quality teaching was taking place and students were highly engaged. In these classrooms, students were participating in hands-on activities, discussions, or group work. However, there were other classrooms where teachers lacked strong classroom management and/or did not have student engaged in learning. In one classroom, students were working on large worksheet packets, and though several students had completed their packets, they had not been given additional work and were just sitting at their desks. While none of the classrooms observed had critical problems, there were some that were had weaknesses. Additional training and mentoring by strong, experienced for teachers could aid in improving the performance of teachers who seem to be struggling.

## **Summary**

### Strengths

- The school's new administrator received positive feedback from the board, parents, and students. Based on the PCSC staff member's interactions, he seems to be honest, organized, and working to guide the school toward improvement.
- The administrator and business manager are focused on understanding the school's financial situation and building a budget and plan that will improve the fiscal health.
- Parents and students both spoke highly of the classical curriculum and Spanish language immersion program.
- Both parents and students feel that the school has improved recently and is headed in the right direction.

### Challenges or Areas for Improvement

- The school's finances are tight and the lease is potentially unsustainable based on the contract.
- Academics need improvement; the school received a 2 Star Rating.
- Teaching that was observed was inconsistent; in some classrooms students were not engaged. Student feedback is consistent with this, since the high-performing students interviewed did not feel they were being challenged academically on a consistent basis.

### Concerns

- The school's 2 Star Rating and low points in the Student Growth sections is of concern.
- The school may not be able to maintain fiscal stability due to lower-than-expected enrollment and a high lease payment.

### Possible Charter Violations

- There are no apparent charter violations at this time.

### Possible Charter Amendments

- Future amendments could include updated MSES using STAR data is a potential future amendment (Identified by PCSC staff, not the ACVS staff or board)

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Recommendations

- PCSC staff will hold a follow-up meeting with the school to further discuss the school's star rating and build a plan to improve in the future.
- PCSC staff recommends that the administrator observe teachers and continue plans to provide teacher training and mentoring / support to teachers who are struggling.
- PCSC staff recommends that the charter be amended to update MSES to be aligned with the ID Five-Star Rating System.
- PCSC staff recommends that the administrator, clerk, and board all remain diligent in monitoring their finances to give them the best possible chance of ending the year with a carryover.
- PCSC staff recommends that the board communicate with the owner of the school building to attempt to renegotiate the terms of the school's lease.

Materials or Follow-up Requested of the School

The school received a follow-up request to schedule a meeting regarding their star rating.

**CHARTER SCHOOL DASHBOARD**

**Date:** 11/5/12

**School Name:** Heritage Community Charter School

**School Address:** 1830 E Ustick Road, Caldwell, ID 83605

**School Phone:** 208-453-8070

**Current School Year:** 2012-2013

**School Mission:** The Mission of Heritage Community Charter School is to create an atmosphere of mutual respect where students feel safe and are challenged to become their best selves as they develop a curiosity and love of learning that will continue throughout their lives and prepares them for post-secondary education, careers, and service in their communities as well educated leaders who desire to preserve a democratic society and who act with integrity and character.

**CHARTER SCHOOL BOARD**

Board Member Name	Office and Term	Skill Set(s)	Email	Phone
Richard Hammond	Chairman, Term November 2011-June 2014	Attorney, Parent	rhammond@heritagecommunitycharter.com	(208) 453-8070
Lon Mcrae	Vice Chairman, Term January 2010-June 2013	Dentist, Parent	lmcrae@heritagecommunitycharter.com	(208) 453-8070
Tamara Strikwerda	Board Member, Term December 2011-June 2014	Small Business Owner, Parent	tstrikwerda@heritagecommunitycharter.com	(208) 453-8070
Barbara Hooper	Board Secretary, Term July 2012-June 2015	Administrative, Parent	bhooper@heritagecommunitycharter.com	(208) 453-8070
Josh Gregory	Board Member, Term October 2011-June 2013	Law Enforcement, Parent	jgregory@heritagecommunitycharter.com	(208) 453-8070
Robb MacDonald	Treasurer, Term December 2011-June 2014	City Planning, Facilities, Parent	rmacdonald@heritagecommunitycharter.com	(208) 453-8070
Open				

**ENROLLMENT**

Grade Level	Current Enrollment	Current ADA	Current Waiting List	Previous Year's Enrollment	Previous Year's ADA
K	59	54	92	59	

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<b>1</b>	60	58	61	59	
<b>2</b>	58	52		60	
<b>3</b>	60	52	18	59	
<b>4</b>	59	52		57	
<b>5</b>	56	50		57	
<b>6</b>	45	40		56	
<b>7</b>	52	44		27	
<b>8</b>	32	25		26	
<b>9</b>	NA	NA		10	
<b>10</b>	NA	NA		19	
<b>11</b>	NA	NA		7	
<b>12</b>	NA	NA		1	
<b>TOTAL</b>	481	430	171	497	492

**Student Attrition Rate:** K-8 Enrollment: Spring 2012-460; Fall 2012-444; Current-481

**Is your school planning to increase or decrease enrollment opportunities for the upcoming school year?** No  
**If yes, briefly describe planned enrollment changes, including numbers and grades affected:**

**STUDENT DEMOGRAPHICS**

School Year	Hispanic (# and %)	Asian (# and %)	White (# and %)	Black (# and %)	American Indian (# and %)	LEP (# and %)	FRL (# and %)	Special Education (# and %)
<b>Current</b>	153, 32%	5, <1%	304, 63%	3, <1%	3, <1%	15, 3%	330, 68.5%	23, 5%
<b>Previous</b>	152, 29%	8, 1.5%	343, 66%	7, 1.5%	10, 2%	28, 6%	389, 75%	28, 6%

**FACULTY AND STAFF**

**Administrator Name(s):** Javier Castaneda  
**Administrator's Hire Date:** 7/15/12  
**Administrator Email(s):** jcastaneda@heritagecommunitycharter.com  
**Current Classified Staff (# FTE):** 9.55  
**Classified Attrition Rate:** 33% (all open positions have been filled)  
**Current Faculty (# FTE):** 26  
**Faculty Attrition Rate:** 37% (all open positions have been filled)

**EDUCATIONAL PROGRAM**

**Did your school make AYP during the last school year?** No  
**If no, please specify indicator and status:** Targets Missed: All students Math Proficiency, Economically Disadvantaged Math Proficiency, Hispanic Math Proficiency; Status: Alert

**If no, please describe plan for addressing need:**

- Title 1 Targeted Assistance Program expanded to include small group support in math in grades K-8 (initial screenings include ISAT data, PMA data, CBM data, and classroom teacher recommendation; 79 students in grades K-3 were invited to receive additional services in math instruction; 47 students in grades 4-8 were invited to receive additional services in math instruction).
- Math instruction and data analysis is a focus of Professional Development during the 2012-2013 school year. (See attached PD Calendar).

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3. In addition to the core math instruction in Singapore Math, all teachers in grades K-6 will be implementing weekly concept boards directly aligned to the state standards.
4. Review of SIOP strategies as part of Professional Development for 2012-2013 school year. (See attached PD calendar).
5. Direct invitation to specific families to participate in Math and Literacy Family Nights and Title 1 Parent Advisory Committee.

**Was your school selected to participate in NAEP this year?** No

### REPORTING

**Date of last programmatic operations audit?** 12/12/11-12/13/11

**Date submitted to authorizer?** 10/10/12

**Who performed your most recent programmatic audit?** ICSN

**Date of most recent fiscal audit?** 10/19/2012

**Date submitted to authorizer?** 11/5/12

### COMMENTS

**Please describe any significant changes experienced by your school in the past year:**

Administration:

During the 2011-2012 school year we experienced significant changes in our administrative team. Dr. Ivie (2011-2012 executive director) went on medical leave in December and did not return to the school. The beginning of January marked the next change with the elimination of our business manager and marketing director. Due to the drastic changes made, Jean Taylor obtained a provisional administrative certificate and became the school's interim administrator. In May 2012, the Executive Director Recruitment Committee hired Mr. Javier Castaneda to become HCCS's Executive Director for the 2012-2013 school year. Our business manager, Elizabeth Moore, was employed in September 2012. Jean Taylor is also part of our administrative team, on a consultant basis, as our Special Education Director.

Discontinuation of High School Pilot program:

In June 2012, the HCCS board of directors made the executive decision to discontinue the high school pilot program. The decision to discontinue the high school pilot program was based on the following factors: not receiving accreditation for the 2011-2012 school year, school culture (intense discipline needs with high school students), lack of strong academic success. The decision was upheld by the Idaho Public Charter School Commission as per the July 2012 meeting. For the 2012-2013 school year, HCCS is housing grades K-8, with a potential of having 60 students at each grade level.

Professional Development Calendar:

In August of 2011, the staff received SIOP professional development. However there was not any professional development throughout the school year. During 2012-2013, we are offering Love and Logic to the staff on a monthly basis. We are also focusing our PD days on: Classical training, math interventions and strategies, SIOP review, CCSS introduction and implementation plan and data focus groups. (See attached Professional Development Calendar.)

Classroom Creeds:

All classrooms K-8 are reciting a classroom creed, as per Standard 3 of the charter.

Increased Board Training and Development:

The HCCS board of directors has regularly scheduled trainings each month at 6:00 (30 minutes prior to regular board meeting). The school board has chosen to use Dr. Brian Carpenter's work, Charter School Board University. The board also received on-site training with Brian Carpenter in the Spring of 2012.

Embedding of School-wide discipline processes:

- All teachers began receiving training from the 9 Essential Skills for the Love and Logic Classroom. The program consists of 9 modules; one module will be taught each month between August 2012 and May 2013. The Love and Logic

approach uses humor, hope, and empathy to strengthen the relationship between teacher and student. It emphasizes respect and dignity for adults and children as well as providing limits in a loving way. The 9 Essential Skills for the Love and Logic Classroom teaches consequences and healthy decision making.

- Expectation Stations are an integral piece of providing limits and consistency to students. The Expectation Stations are taught quarterly. The Expectation Stations consist of what is expected from students in various locations throughout the school such as: cafeteria, hallways, playground. Our hope is that by explicitly teaching students what is expected they will be more likely to succeed in the choices they make.
- Inappropriate behavior results in a discipline referral (pink slip) and can be written for either major or minor incidents. Examples of Majors include: cursing, fighting, and cheating. Examples of Minors include: talking back, horseplay, and put-downs to others. (A matrix outlining more specifics was handed out at fall in-service the first day.) Students receive a Referral for both a Major and a Minor and all referrals are sent home for parent signature. We are currently exploring a database system that will facilitate analyzing the behavioral data. The data analysis allows our leadership team members to create targeted interventions that improve the behavioral and social environment school wide.

School-wide master schedules:

Master schedules were designed to optimize our Title 1 Reading and Title 1 Math support. In grades K-5, schedules were blocked with staggered reading and math times which allows our Title 1 Teachers to work with targeted students during more flexible times of the day. In grades 6-8, we have provided a study hall for all students with two areas of focus. First, to provide Title teachers an opportunity to work with targeted students. The other rationale for including a study hall for all students is to give them increased opportunities for success. Each study hall teacher receives a weekly update from classroom teachers specifying missed assignments and/or upcoming projects, assignments or tests.

**Please describe the greatest successes experienced by your school in the past year:**

HCCS' successes have hinged on the creation and continued support of our teaching, administrative, and classified team, including the hiring of 9 new classroom teachers. An executive director and business manager have also been hired, and they've been working with school staff to develop a school wide vision toward high academic results and fiscal responsibility. We've also developed a yearlong plan for professional development and review of the charter that specifically addresses our areas of needed improvement. (i.e. Including math professional development, CCSS, staff training in "Love and Logic" to address student behavior needs, and meeting charter requirements of creeds and Latin.) HCCS has recently surveyed parents and has received high parent satisfaction ratings in the areas of Administration, School culture and climate, academic programs, and overall school rating. This is in part due to development of effective leadership teams at HCCS that oversee communications with our stakeholders, fulfillment of state requirements & deadlines, and review of charter requirements and policies.

**Please describe any challenges you anticipate during the upcoming year:**

Potential challenges we may face during the 2012-2013 school year include:

- Enrollment Numbers: Lower than anticipated enrollment numbers affect the operating budget. An enrollment committee comprised of administration, faculty and parents has been formed with an intense focus on immediate student recruitment.
- Facility Space: It is currently necessary to hold music classes in the school library and within individual classrooms. The PE and lunch programs share the same gym/cafeteria space. As a result, we have a very mobile school schedule right now. Many teachers are required to share classroom space and to move from room to room. The space is adequate but not always convenient.

**Please add any additional information of which you would like to make your authorizer aware :**

Additional Attachments:

Draft- HCCS Professional Development Calendar 2012-2013

Financial Audit

Note: Parent Satisfaction Survey Summaries are included for both English and Spanish

**REQUIRED ATTACHMENTS**

- Most recent ISAT, IRI, DWA, and DMA results (as applicable)
- Chart comparing ISAT, IRI, DWA, and DMA scores over the past four years of operation (as applicable)
- Goals attainment report comparing the measurable student educational standards in your charter to actual results.
- Written response to recommendations from most recent programmatic operations audit.
- Most recent parent/stakeholder satisfaction survey results
- Budget actuals for most recent month-end
- Budget estimates for remainder of current year, and fiscal outlook for next year

HCCS: Measurable Student Educational Standards	2011-2012	2012-2013
<p><b>Standard 1:</b> Students at Heritage Community Charter enrolled continuously from the beginning of the school year will show annual academic improvement as measured by:</p> <ul style="list-style-type: none"> <li>* 80% of 2nd and 3rd grade students who have been continuously enrolled at HCCS for two or more years will score equal to or better than the statewide benchmark as measured by the Idaho Reading Indicator.</li> <li>* 80% of students who have been continuously enrolled at HCCS for more than two or more years will achieve proficient or above in all required subjects as measured by the Idaho Standards Achievement Tests (ISAT).</li> <li>* 90% of students will achieve satisfactory or above in core subjects on quarterly academic progress reports, after two or more years of continuous enrollment at HCCS, as measured by teacher developed classroom assessment tools, such as, but not limited to culminating portfolios, assignments, quizzes and tests.</li> </ul>	N/A	N/A: Data will be available upon completion of the 2012-2013 school year.
<p><b>Standard 2:</b> HCCS will achieve a daily average school absentee rate of less than 10% when calculated on a monthly basis.</p>	N/A	Currently our ADA is 89.4 %. We are implementing a school-wide attendance policy that will enforce a sense of urgency with students and parents.
<p><b>Standard 3:</b> Students will be able to recite a school, class, or personal creed after 6 consecutive months at Heritage Community Charter School assessed by the classroom/advisory teacher using the following measurements: Grades K – 6:</p> <ul style="list-style-type: none"> <li>• 85% of students participating in a flawless recitation of a school or class creed as part of a whole group (class) setting.</li> <li>• 85% of students individually reciting a grade appropriate class creed flawlessly, with a maximum of two prompts.</li> </ul> <p>Grades 7-12</p> <ul style="list-style-type: none"> <li>• 85% of students participating in a flawless recitation of a school or class creed as part of a whole group (class) setting.</li> <li>• 85% of students individually reciting a flawless class or personal creed.</li> </ul>	N/A	Currently 100% of our students are participating in the recitation of classroom creeds.

HCCS: Measurable Student Educational Standards	2011-2012	2012-2013
<p><b>Standard 4:</b></p> <ul style="list-style-type: none"> <li>95% of all students, 9-12, will develop and maintain a career portfolio. Completion/progress monitoring benchmarks are:               <ul style="list-style-type: none"> <li>85% of students will achieve satisfactory status or above for their grade appropriate portfolio assignment pieces based on teacher developed rubrics.</li> <li>95% of 8th grade students will develop an 8-year plan including a four year high school and a four year post high school career/education plan as</li> </ul> </li> </ul>	<p>N/A 8th grade students developed a four year high school plan.</p>	<p>Obtained a grant for Career Information Systems. Students in grades 5-8 will begin creating a career portfolio. All students in grade 8, will create an 8 year plan by the end of the school year. CIS implementation will begin November 2012 for grades 5-8.</p>
<p><b>Standard 5:</b> 90% of students will participate in a yearly community service project as outlined: K-6 – community projects established by teachers and supported by parents 7-8 – class-sponsored community projects 9-11 – individual/small group community projects 12 – community action piece as part of the student’s senior project.</p>	<p>Few community service projects were implemented.</p>	<p>By the end of the school year, K-6 students will be participating in a yearly community service project. Currently 5th grade has completed one service project and 2nd grade is getting ready to implement their service project.</p>
<p><b>Standard 6:</b> HCCS will achieve above average parent and student satisfaction as measured by completion of an annual parent and student satisfaction survey.</p> <ul style="list-style-type: none"> <li>A minimum of 50% of HCCS parents will complete a parent satisfaction survey no later than April 30th of each school-year. Parent satisfaction ratings will be calculated in each of the following areas: Academic Program, Parent and Community Relations/Communication, Administration and Board Activity, General School Operations. HCCS will score a minimum of 3.0 on a 5.0 scale in each area during the first three years of operation. After year 3, HCCS will score at least 3.5 on a 5.0 scale in all areas measured by the parent satisfaction survey.</li> <li>A minimum of 75% of HCCS students in grades 4th -12th will complete a student satisfaction survey at least once a year. Student satisfaction ratings will be calculated in each of the following areas: Academic Program, School Culture, Faculty/Administrative and Student Relations/Communication. HCCS will score a minimum of 3.0 on a 5.0 scale in each area during the first three years of operation. After year 3, HCCS will score at least 3.5 on a 5.0 scale in all areas measured by the student satisfaction survey.</li> </ul>	<p>277 Parents took the survey, 234 elementary (K-6), 43 families 7-12.</p>	<p>During parent/teacher conferences (Nov. 1 and Nov.2), Parent Satisfaction surveys were available for parents to take. The surveys were distributed via Survey Monkey, and parents were personally invited to take the survey either as they walked in the doors, reminded during their conferences, or as they were leaving the conferences. Surveys were developed in both English and Spanish. Approximately 100 surveys have been taken, and they will continue to be available for parents to complete at HCCS events to increase the amount of surveys completed. A complete report of the parent satisfaction survey will be available by the end of 1st semester. Plans for the student satisfaction survey are to have all students complete the survey online via survey monkey.</p>

**2011 - 2012 Adequate Yearly Progress Report**  
**Heritage Community Charter District (481) / Heritage Community Charter (1343)**

Was AYP Met?	School Improvement Status	Reading Goal	Math Goal	3rd Indicator Goal
No	Alert	Met AYP	Alert	Met AYP

Targets Missed:  
 All Students: Math Proficiency  
 Economically Disadvantaged : Math Proficiency  
 Hispanic: Math Proficiency

	ISAT Reading		ISAT Math		3rd Indicator
Grades: 3, 4, 5, 6, 7, 8, 10	% Tested	% Proficient	% Tested	% Proficient	Language Usage
	Goal: 95.0%	Goal: 85.6%	Goal: 95.0%	Goal: 83.0%	Goal: 75.1%
All Students	<u>100%</u>	<u>91.4%</u>	<u>100%</u>	<u>80.7%</u>	<u>82.7%</u>
African American	~	~	~	~	
Asian	~	~	~	~	

American Indian	~	~	~	~	
Hispanic	<u>100%</u>	<u>85.1%</u>	<u>100%</u>	<u>69.7%</u>	
Native Hawaiian/Pacific Islander	~	~	~	~	
White	<u>100%</u>	<u>94%</u>	<u>100%</u>	<u>85.5%</u>	
Limited English Proficiency	~	~	~	~	
Economically Disadvantaged	<u>100%</u>	<u>89.5%</u>	<u>100%</u>	<u>77.7%</u>	
Students with Disabilities	~	~	~	~	

Heritage Community Charter School  
Idaho Reading Indicator (IRI) Preliminary Data  
Fall 2012

• Kindergarten:	Benchmark (3)- 59%	Strategic (2)- 22%	Intensive (1)- 19%
• 1 <sup>st</sup> :	Benchmark (3)- 67%	Strategic (2)- 20%	Intensive (1)- 13%
• 2 <sup>nd</sup> :	Benchmark (3)- 63%	Strategic (2)- 25%	Intensive (1)- 12%
• 3 <sup>rd</sup> :	Benchmark (3)- 74%	Strategic (2)- 19%	Intensive (1)- 7%

# December 4, 2012

CURRENT FISCAL YEAR BUDGET COMPARISON

11/1/12 Heritage Community Charter School thru 09/30/12	Proposed (Board Approved Budget for Fiscal Year)	Actual (Through Most Recent Month End)	Projected (Anticipated Year-End Numbers)	Percentage Used (Actual / Proposed)	Notes	State Comparison (Anticipated Year End Numbers) <i>This column for state use only.</i>	Difference Between State and School's Projected
<b>REVENUE</b>							
Salary Apportionment	\$1,235,514.00	\$1,344,109.00	\$1,120,533.00	108.79%	Projected budget reflects reduction due to adjustment to support units. Previous budget calculated at 27.6. This calculated at 23.3. Total overall reduction \$217,132. This item reduction: \$114,981		
Benefit Apportionment	\$219,165.00		\$202,144.00	0.00%			
Entitlement	\$544,280.00		\$459,150.00	0.00%	This item reduction \$85,130		
State Transportation	\$165,000.00		\$165,000.00	0.00%			
Lottery				#DIV/0!			
Other State Funds (Specify)	\$72,007.00	\$3,000.00	\$72,007.00	4.17%	Classroom Technology/Idaho Reading Initiative/Math Science Initiative		
Special Ed - Regular	\$75,000.00	\$5,538.92	\$75,000.00	7.39%			
Special Ed - ARRA				#DIV/0!			
Title I	\$169,000.00	\$18,210.76	\$169,000.00	10.78%			
Federal Title I Funds : ARRA				#DIV/0!			
Medicaid Reimbursement				#DIV/0!			
Title IIA	\$22,000.00		\$22,000.00	0.00%	Teacher Improvement (Prof Dev)		
Local Revenue (Specify)				#DIV/0!			
Federal Startup Grant				#DIV/0!			
Other Grants (Specify)	\$12,000.00	\$144.10	\$12,000.00	1.20%	Lunaria League Grant Carryover		
Fundraising	\$7,500.00	\$728.92	\$7,500.00	9.72%			
Interest Earned	\$100.00	\$15.10	\$100.00	15.10%			
Other (Specify)	\$18,900.00		\$18,900.00	0.00%	School Fees and Charges		
Other (Specify)	\$170,000.00	\$5,123.42	\$170,000.00	3.01%	Food Service Revenue		
<b>TOTAL REVENUE</b>	<b>\$2,710,466.00</b>	<b>\$1,376,870.22</b>	<b>\$2,493,334.00</b>	<b>50.80%</b>		<b>\$0.00</b>	
<b>EXPENDITURES</b>							
<b>100 Salaries</b>							
Teachers	\$857,837.00	\$76,112.65	\$747,447.00	8.87%			
Special Education	\$60,000.00	\$3,809.83	\$60,000.00	6.35%			
Instructional Aides	\$55,000.00	\$5,847.68	\$55,000.00	10.63%			
Classified/Office	\$91,800.00		\$133,400.00	0.00%			
Administration	\$85,000.00	\$57,887.64	\$133,150.00	68.10%	Classified staff wages included in Administration		
Maintenance	\$20,800.00	\$4,000.00	\$20,800.00	19.23%			
Other (Specify)	\$44,000.00	\$5,606.50	\$44,000.00	12.74%	Food Service Wages		
Other (Specify)				#DIV/0!			
<b>Total Salaries</b>	<b>\$1,214,437.00</b>	<b>\$153,264.30</b>	<b>\$1,193,797.00</b>	<b>12.62%</b>			
<b>200 Employee Benefits</b>							
PERSI/FICA/Benefits	\$340,465.00	\$34,740.15	\$300,000.00	10.20%			
Other (Specify)	\$8,000.00		\$8,000.00	0.00%	Workers Comp		
<b>Total Benefits</b>	<b>\$348,465.00</b>	<b>\$34,740.15</b>	<b>\$308,000.00</b>	<b>9.97%</b>			
<b>300 Purchased Services</b>							
Management Services	\$17,000.00	\$14,164.03	\$17,000.00	83.32%			
Staff Dev/Title IIA	\$17,000.00	\$185.00	\$17,000.00	1.09%			
Legal Pub/Advertising				#DIV/0!			
Legal Services	\$12,000.00	\$9,301.01	\$11,000.00	77.51%			
Special Education	\$10,000.00	\$791.00	\$10,000.00	7.91%			
Liability & Property Ins	\$11,000.00	\$16,638.00	\$16,638.00	151.25%			
Substitute Teachers				#DIV/0!	substitute teachers cost moved to Salaries Other		
Board Expenses		\$1,000.00	\$1,000.00	#DIV/0!			
Computer Services				#DIV/0!			
Transportation	\$220,000.00	\$6,596.27	\$220,000.00	3.00%			
Travel				#DIV/0!			
Other (Specify)	\$5,000.00	\$0.00	\$5,000.00	0.00%	Audit Fees		
Other (Specify)	\$2,000.00	\$2,770.00	\$2,000.00	138.50%	Business Ops		
<b>Total Services</b>	<b>\$294,000.00</b>	<b>\$51,445.31</b>	<b>\$299,638.00</b>	<b>17.50%</b>		<b>\$0.00</b>	
Facilities				#DIV/0!			

# December 4, 2012

CURRENT FISCAL YEAR BUDGET COMPARISON

Building Lease	\$493,889.00	\$77,943.10	\$493,889.00	1.88%		
Land Lease				#DIV/0!		
Modular Lease				#DIV/0!		
Utilities, Phones, Lndscp	\$37,000.00	\$14,204.28	\$37,000.00	0.00%		
Site Preparation				#DIV/0!		
Other (Specify)				#DIV/0!		
Other (Specify)				#DIV/0!		
<b>Total Facilities</b>	<b>\$530,889.00</b>	<b>\$92,147.38</b>	<b>\$530,889.00</b>	<b>17.36%</b>		<b>\$0.00</b>
<b>400 Supplies and Maintenance</b>						
Textbooks				#DIV/0!		
School Supplies	\$147,332.00	\$23,698.53	\$135,000.00	16.09%	All school supplies except for custodial. Includes food service, program, instructional and administration	
Power School				#DIV/0!		
Custodial Supplies	\$10,000.00	\$4,943.73	\$8,000.00	49.44%		
Other (Specify)	\$15,000.00	\$2,626.00	\$15,000.00	17.51%	Copier Lease	
Other (Specify)	\$7,500.00	\$107.38	\$7,500.00	1.43%	Fundraising	
<b>Total Supplies</b>	<b>\$179,832.00</b>	<b>\$31,375.64</b>	<b>\$165,500.00</b>	<b>17.45%</b>		<b>\$0.00</b>
<b>500 Capital Objects</b>						
Furniture				#DIV/0!		
Technical AV Equipment				#DIV/0!		
Other (Specify)				#DIV/0!		
Other (Specify)	\$9,652.00	\$0.07	\$9,652.00	0.00%	Food service equipment	
Other (Specify)	\$17,000.00	\$4,674.40	\$10,000.00	27.50%	Other funds equipment	
Other (Specify)	\$5,000.00	\$647.50	\$5,000.00	12.95%	Equipment	
<b>Total Capital Objects</b>	<b>\$31,652.00</b>	<b>\$5,321.97</b>	<b>\$24,652.00</b>	<b>16.81%</b>		<b>\$0.00</b>
<b>Debt Service</b>						
Specify			\$80,075.15	#DIV/0!	FY 2012 Overpayment due to incorrect support unit calculation.	
Specify				#DIV/0!		
Specify				#DIV/0!		
<b>Total Debt Service</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$80,075.15</b>	<b>#DIV/0!</b>		<b>\$0.00</b>
<b>Grant Purchases</b>						
Specify				#DIV/0!		
Specify				#DIV/0!		
Specify				#DIV/0!		
Specify				#DIV/0!		
Specify				#DIV/0!		
<b>Total Grant Purchases</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>#DIV/0!</b>		<b>\$0.00</b>
Reserve Fund	\$66,781.00			0.00%		
Building Fund				#DIV/0!		
<b>Total Expenses</b>	<b>\$2,666,056.00</b>	<b>\$368,294.75</b>	<b>\$2,602,551.15</b>	<b>13.81%</b>		
Carryover from Previous FY	\$189,302.00		\$189,302.00	0.00%		\$0.00
<b>Reserve/(Deficit)</b>	<b>\$233,712.00</b>	<b>\$1,008,575.47</b>	<b>\$80,084.85</b>	<b>431.55%</b>		

# December 4, 2012

UPCOMING FISCAL YEAR BUDGET COMPARISON

Heritage Community Charter School 11/1/12	Proposed Budget	Notes	Difference from "Current Fiscal Year"	
<b>REVENUE</b>				
Local Revenue			\$0.00	reflects projected from "current FY"
<b>State Revenue</b>				
Entitlement	\$249,796.00	540 enrollment is used for the upcoming year as it is an attainable number at Heritage.	\$249,796.00	reflects State actual from "current FY"
<b>Wages</b>				
Administration	\$85,000.00			
Teachers	\$882,837.00			
Classified	\$236,600.00		\$1,204,435.91	reflects all salaries compared to State actual from "current FY"
Medicaid	\$15,000.00		\$15,000.00	reflects projected from "current FY"
Benefit	\$353,606.00		\$165,000.00	reflects State actual from "current FY"
Transportation	\$165,000.00		\$165,000.00	
<b>Federal Revenue</b>				
Title I	\$148,000.00		#DIV/0!	reflects State actual from "current FY"
Special Ed	\$65,000.00		#DIV/0!	reflects State actual from "current FY"
Title II	\$22,000.00		\$22,000.00	reflects State actual from "current FY"
Startup Grant			#DIV/0!	reflects State actual from "current FY"
Other Sources (Specify)	\$170,000.00	Nutrition		
Other Sources (Specify)	\$26,500.00	Fundraising, Student Fees, Interest		
Other Sources (Specify)	\$57,007.00	Other State sources: SED, Math, Science, Technology, LEP		
Total Revenue before holdback	\$2,476,346.00		#DIV/0!	
<b>PROPOSED HOLDBACK</b>				
Teacher Salaries		Holdbacks should be estimated at a minimum of 5% - 5.5% for FY 2011.		
Classified Salaries				
Admin Salaries				
Benefits				
Entitlement				
Transportation				
Total Holdback	\$0.00		\$0.00	there were no holdbacks last year
Total Revenue after holdback	\$2,476,346.00		\$2,476,345.49	reflects State actual from "current FY"
<b>EXPENDITURES</b>				
<b>100 Salaries</b>				
Teachers	\$852,337.00		104,890.00	reflects projected from "current FY"
Admin	\$85,000.00		(48,150.00)	reflects projected from "current FY"
Classified	\$236,600.00		103,200.00	reflects projected from "current FY"
Special education	\$30,500.00			
Other (Specify)				
Other (Specify)				
Total Salaries	\$1,204,437.00		159,940.00	
<b>200 Benefits</b>				
Benefit Dollars	\$216,939.00			
PERSI/Payroll taxes	\$128,667.00			
Other (Specify)	\$8,000.00	Workers Compensation		
Total Benefits	\$353,606.00		\$45,606.00	reflects projected from "current FY"
<b>300 Purchased Services</b>				
Transportation	\$220,000.00		\$0.00	reflects projected from "current FY"
Special Education	\$25,000.00		\$15,000.00	reflects projected from "current FY"
Proctor costs				
Legal	\$12,000.00		\$1,000.00	reflects projected from "current FY"
Insurance	\$11,000.00		(\$5,638.00)	reflects projected from "current FY"
Copier Lease	\$12,500.00		\$12,500.00	
Printer Lease			\$0.00	
Facility Lease	\$493,889.00		\$493,889.00	reflects projected from "current FY"
Utilities	\$35,000.00		(\$2,000.00)	reflects projected from "current FY"
Professional Development	\$22,000.00		\$5,000.00	reflects projected from "current FY"
Technology	\$15,832.00		\$15,832.00	reflects projected from "current FY"

