



Idaho Public Charter School Commission

PUBLIC CHARTER SCHOOL COMMISSION MEETING

February 9, 2012
700 W. State Street, Boise, Idaho
JRW West Conference Room

Thursday, February 9, 2012 – 700 W. State Street, JRW West, 10:30 a.m.

1. Commission Work
2. Rolling Hills Public Charter School Corrective Action Plan
3. Blackfoot Community Charter Learning Center Corrective Action Plan and Proposed Charter Amendment
4. Heritage Community Charter School Annual Update and Proposed Charter Amendment
5. Heritage Academy Annual Update and Proposed Charter Amendment
6. The Village Charter School Annual Update
7. Legacy Charter School Annual Update
8. Idaho Science and Technology Charter School Annual Update
9. DaVinci Charter School Annual Update

OTHER / NEW BUSINESS

If auxiliary aids or services are needed for individuals with disabilities, or if you wish to speak during the Open Forum, please contact the SBOE office at 334-2270 or PCSC staff before the meeting opens. While the PCSC attempts to address items in the listed order, some items may be addressed by the PCSC prior to or after the order listed.

1. Agenda Approval

Does the Public Charter School Commission (PCSC) have any changes or additions to the agenda?

2. Rolling Calendar

COMMISSION ACTION

The PCSC has approved April 5, 2012, and May 31, 2012, as the dates and Boise, Idaho as the location for its regularly scheduled meetings to follow the February 2012 meeting.

To approve July 24, 2012, as the date and Boise, Idaho as the location for the following regularly scheduled PCSC meeting.

3. Minutes Approval

COMMISSION ACTION

To approve the meeting minutes from December 15, 2012, as submitted.

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**DRAFT MEETING MINUTES
PUBLIC CHARTER SCHOOL COMMISSION MEETING
THURSDAY, DECEMBER 15, 2011
700 W. STATE STREET, BOISE, IDAHO
JRW WEST CONFERENCE ROOM**

A regular meeting of the Idaho Public Charter School Commission (PCSC) was held Thursday, December 15, 2011, at 700 W. State Street, Boise, ID, JRW West Conference Room. Chairman Alan Reed presided.

The following members were in attendance:

Gayann DeMordaunt	Nick Hallett
Gayle O'Donahue	Wanda Quinn

Absent: Esther Van Wart, Brad Corkill

Chairman Reed called the meeting to order at 9:01 a.m.

M/S: (Hallett/DeMordaunt): To move into executive session pursuant to Idaho Code Section 67-2345(1)(d) to consider records that are exempt from disclosure as provided in Chapter 3, Title 9, Idaho Code. *The motion passed unanimously.*

M/S: (DeMordaunt/O'Donahue): To leave executive session. *The motion passed unanimously.*

Chairman Reed called the regular meeting back to order at 9:25 a.m.

1. Commission Work

Agenda Approval

M/S (DeMordaunt/O'Donahue): To approve the agenda as amended with a change to Rolling Hills Public Charter School from "fiscal" update to "status" update to broaden the scope of consideration to include a recently identified concern. *The motion passed unanimously.*

Rolling Calendar

M/S (Quinn/DeMordaunt): To approve May 31, 2012, as the date and Boise, Idaho, as the location for the regularly scheduled PCSC meeting to follow the April 5, 2012, meeting. *The motion passed unanimously.*

Minutes Approval

M/S (Quinn/DeMordaunt): To approve the meeting minutes from October 20, 2011, as submitted. *The motion passed unanimously.*

2. Summit Public Charter School (Summit) New Charter Petition

Jonathan Braack, Board Chair; Heather Lorimer, Board Member; Susan Hall, Board Secretary; Greg Smith, Board Member and Financial Advisor; Richard Kirkham, Board Member and Founder of The Academy at Roosevelt Center; and Heath Mitchell, Finance Manager, represented Summit.

Mr. Braack provided a presentation introducing the Summit petition including academic method, fiscal projections, facilities options, research-driven curriculum and practices, and marketing plan.

Mr. Kirkham indicated that several families were in attendance to support the Summit petition.

In discussion, the PCSC agreed that the long list of outstanding concerns cited in the most recent staff review of Summit's petition need to be addressed prior to making a decision.

Commissioner DeMordaunt noted that the PCSC must make approval or denial decisions based on the content of the petition because that is the document on which both parties will rely to evaluate the future performance of the school.

Commissioner Quinn asked whether the petitioners can reasonably resolve all the outstanding issues before the next meeting.

Ms. Baysinger noted that while the petitioners have been aware of many of the concerns cited throughout several staff reviews, and have failed to correct those issues, timely resolution is possible should the petitioners choose to address the concerns.

M/S (Hallett/Quinn): To hold the decision on the Summit Public Charter School petition until a future meeting of the PCSC and to direct staff to continue work with the petitioners to address outstanding concerns. *The motion passed unanimously.*

Commissioner DeMordaunt commended the school for assembling a well-qualified board of directors.

Chairman Reed encouraged the school to clean up all unresolved issues prior to the next Commission meeting on February 9, 2012.

3. Rolling Hills Public Charter School (RHPCS) Status Update

John Montgomery, Administrator; and Niki Crow, Board Clerk, represented RHPCS.

Ms. Crow said meeting materials reflected the school's fiscal status through October 2011. There is an anticipated \$2,500 reserve at year-end. Enrollment is currently 270. RHPCS has worked diligently to keep expenditures down and to keep them in line with budget. The Medicaid number is based on last year's actual. Preliminary numbers indicate that RHPCS will be under budget on Medicaid.

Commissioner Quinn asked whether demands will be made by the bank due to the lack of the required reserve. She also inquired about the status of the founders' loan.

Ms. Crow said the bank has been working with RHPCS and has not demanded any payments. RHPCS cannot begin paying the founder's loan until the bank reserve is met.

Chairman Reed asked about the school's plan is for Board elections.

Mr. Montgomery said Board elections are scheduled for January and the expectation is to have several new board members at that time.

Ms. Crow indicated February 9th is the specific date of the board elections.

Commissioner DeMordaunt noted that, according to the RHPCS bylaws, elections were to be held in the fall and have now been delayed six months.

Ms. Crow said the RHPCS bylaws provide the option of delaying elections. She was not certain of the reason for the delay of the elections, but believed it may due to special projects.

Commissioner DeMordaunt noted that it appears the required annual board meeting has not taken place and will not take place until February.

Commissioner Quinn asked for clarification on the Board election schedule.

Ms. Crow said applications will be collected, distributed, and reviewed during January and actual elections will be on February 9th.

Chairman Reed reviewed language from RHPCS's bylaws and said the concern is that RHPCS is out of compliance with their charter because they did not hold an annual meeting and did not hold board elections.

The PCSC agreed that RHPCS needn't continue to make frequent fiscal updates at PCSC meetings unless their financial situation changes. Monthly updates should still be provided to PCSC staff.

M/S (DeMordaunt/Quinn): To issue a notice of defect to Rolling Hills Public Charter School on the grounds of material violation of a standard, condition, or procedure in the approved charter, specifically, Bylaws Article IV with regard to board elections.
The motion passed unanimously.

Ms. Baysinger said PCSC staff has asked for a five-year budget from RHPCS to demonstrate how the school will begin funding the reserve in order to begin repayment of the founder's debt.

The Commission noted that RHPCS board members are required to be present at the February 9, 2012, PCSC meeting to address the notice of defect and provide a corrective action plan. If possible, board elections need to be held prior to the meeting.

4. Xavier Charter School (XCS) Update & Proposed Charter Amendment

Debbie Burr, Board Chair; James Wallace, Board Treasurer; Joan Hurlock, Board Vice Chair; Mel Wiseman, Interim Co-Administrator; Justin Lanting, Business Manager; and Melissa Crane, Board Secretary, represented XCS.

Ms. Burr reported that the recent fiscal audit confirmed a carryover fund balance of \$500,000. Documentation was lacking on two-thirds of audit items. Payroll did not balance with the 941 report, and documentation of revenue was poor. Part of the reason for this is funds were placed in an escrow account. Negotiations are underway regarding the escrow account for visibility and transparency. XCS is vigorously pursuing a purchase of the current facility and is confident they will be able to accomplish this purchase.

Ms. Burr further reported on how technology supports the educational model at XCS, concluding that XCS is comfortable with the language in the charter regarding provision of a technology-rich environment.

Ms. Burr introduced a proposed charter amendment that would increase enrollment.

M/S (Hallett/Quinn): To approve Xavier Charter School's proposed charter amendment increasing the enrollment cap to offer two classes per grade level. The motion passed unanimously.

The PCSC commended XCS on its progress in reestablishing transparent fiscal processes and providing a thorough review of the school's technology.

5. Taylor's Crossing Public Charter School (TCPCS) Compliance Update

Aaron Clegg, Board Chair; Jamie Toop, Finance Manager; Teresa Adelizzi, Board Clerk and Jared Emfield, Acting Administrator, represented TCPCS.

Mr. Clegg said TCPCS has put all teachers on approved contracts, which should resolve the recent NOD issued by the PCSC.

Ms. Baysinger confirmed that the school's teachers are on contracts approved by the Superintendent of Public Instruction and the defect does appear to be resolved.

XCS said they are committed to meeting or exceeding the Commission's expectations.

Mr. Emfield said morale is good and TCPCS is working toward a new chapter.

M/S (O'Donahue/DeMordaunt): To lift the notice of defect issued to Taylor's Crossing Public Charter School on the grounds of violation of a provision of law, specifically, I.C. §33-5206(4), and committing a material violation of a condition, standard or procedure set forth in their approved charter, specifically, the provision that "Taylor's Crossing Public Charter School's staff will meet or exceed qualifications required by state law, including the following: ...All teachers and administrators will be on a written contract approved by the Superintendent of Public Instruction." The motion passed unanimously.

6. White Pine Charter School (WPCS) Annual Update

Terry Rothamer, Administrator; and Gina Stevenson, Acting Board Chair, represented WPCS.

Mr. Rothamer provided a review of the school's status.

Commissioner DeMordaunt commended the school for its use of STAR. She encouraged WPCS to examine MSES 3 and consider submitting a charter amendment.

Mr. Rothamer said WPCS has implemented an additional IRI test to provide longitudinal data from fall to spring.

Chairman Reed inquired about the health insurance issue facing WPCS.

Ms. Swartz said I.C. § 33-5205(3)(m) indicates the legislature does have the expectation that health insurance be provided by public charter schools. She said WPCS' charter includes language stating that all employees will participate in group health insurance.

Commissioner O'Donahue understands budget issues are a concern, but noted that other small schools have been able to provide health insurance.

Commissioner Hallett stressed the importance of compliance with the charter.

M/S (Hallett/Quinn): To direct staff to issue to White Pine Charter School a notice of defect on the grounds of violation of any provision of law, specifically, I.C. 33-5205(3) (m) and material violation of any condition, standard, or procedure set forth in the approved charter, specifically, Tab 6(c), Employee Benefits, for failure to provide group health insurance to staff members.

Commissioner DeMordaunt noted that if WPCS would be able to verify that all employees are participating in group health insurance, whether through the school or not, they would be in compliance with the charter.

Commissioner Hallett asked for interpretation from PCSC counsel.

Ms. Swartz said WPCS provided a letter prepared by its attorney which offered the opinion that neither state statute nor WPCS's charter required the school to provide group health insurance coverage to its employees. However, based upon the language of the statute, as well as the terms of WPCS's charter, it is the opinion of PCSC counsel that such a requirement does exist.

Commissioner DeMordaunt indicated the charter uses the word "participate" not "provide" health insurance. They are therefore out of compliance because one or more of their employees are not participating in group health insurance. She is supportive of the motion based on that fact.

The motion passed unanimously.

7. Blackfoot Community Learning Center (BCCLC) Annual Update

Emily Hansen, Board Secretary; Fred Ball, Administrator; John Heintzelman, Board Chair; and Jocelyn Hayes, Teacher, represented BCCLC.

Ms. Hayes and Ms. Hansen provided a report regarding the status of the school.

Mr. Heintzelman reviewed the school's finances and enrollment expansion of over 40 students.

Commissioner Hallett asked whether the document cited on page 2 of the fiscal audit is now available.

Mr. Heintzelman indicated the school would need to follow up with auditors and let the PCSC know the outcome.

Mr. Ball reported that BCCLC's FY11 anticipated fund balance was \$16,000, but the school actually ended the year with a negative fund balance of \$24,000.

Commissioner Hallett asked about the auditor's comments regarding deficiency in internal controls and financial reporting.

Mr. Heintzelman said this was primarily due to limited funding and the amount of staffing as a result.

Hallett asked whether the auditor was concerned with the accuracy of the financials.

Mr. Heintzelman said BCCLC is unable to hire additional staffing to segregate duties.

Hallett cited page 23 of the audit and said this is not an issue of segregation of duties.

Mr. Ball said there were no reports missing.

Commissioner Hallett strongly encouraged BCCLC to return directly to the auditor when findings are cited to determine exactly what is needed to resolve any concerns.

Mr. Heintzelman said BCCLC will follow up with the auditor and relay findings to PCSC staff.

Commissioner DeMordaunt commended BCCLC's AimsWeb training and focus on RTI implementation using scientific, data-driven decision making.

Chairman Reed said district and state comparisons show that BCCLC's ISAT scores are consistently low compared to the local district and the state. He also noted that BCCLC is out of compliance with the enrollment caps of its charter for grades 1 and 2.

Ms. Hayes said BCCLC took a chance on violation of the charter to grow enrollment and improve the school's fiscal outlook.

Mr. Heintzelman said BCCLC is in the process of developing amendments to the charter.

Chairman Reed confirmed that BCCLC made a decision to increase class sizes without prior approval from the PCSC, which is out of compliance with the school's charter.

Commissioner O'Donahue pointed out that BCCLC was aware of the accountability involved with the transference of the school to a PCSC-authorized school, and even stated during the transfer process that BCCLC looked forward to more stringent oversight.

Commissioner Hallett observed that this school demonstrates a persistent pattern of non-compliance with audit findings and non-compliance with the school's charter.

Mr. Heintzelman said a programmatic audit was done and BCCLC is planning another one in the spring to bring BCCLC back on schedule.

M/S (Hallett/Quinn): To direct staff to issue to Blackfoot Community Charter Learning Center a notice of defect on the grounds of failure to demonstrate fiscal soundness as defined by Section 33-5209(2)(d), Idaho Code. *The motion passed unanimously.*

M/S (Hallett/O'Donahue): To direct staff to issue to Blackfoot Community Charter Learning Center a notice of defect on the grounds of violation a condition set forth in the approved charter, specifically with regard to Tab 2, Enrollment Cap. *The motion passed unanimously.*

Commissioner DeMordaunt requested that the school return to provide the PCSC with an MSES update when spring 2012 test scores are available.

8. The Academy at Roosevelt Center (The Academy) Annual Update

Ellen Jensen, Board Chair; Joel Lovstedt, Principal; and Rod Jackson, Board Vice Chair, represented The Academy.

Mr. Lovstedt reported regarding the status of the school.

Ms. Jensen said an eight acre piece of property was recently purchased for future development.

Commissioner O'Donahue expressed her appreciation for the school's caution in moving forward with facilities.

Chairman Reed inquired regarding PCSC staff's difficulty in obtaining budgets from The Academy.

Mr. Lovstedt said the school's accountant has been directed to work within the PCSC's requirements. The school anticipates a \$50,000 carryover in FY12.

Commissioner Quinn asked whether the Summit petitioners' plans to market to The Academy's waiting list are supported by The Academy.

Mr. Lovestedt said there is no chance The Academy can meet the needs in the community evidenced by the waiting list of over 200 students. The Academy will not provide Summit with their waiting list, and The Academy's lottery will take place prior to Summit's lottery.

Commissioner O'Donahue cautioned the school to protect the privacy of stakeholders.

The Academy reported that Mr. Braack is terminating his position with their school at the end of January and there are no other board members serving on both boards.

9. INSPIRE Connections Academy (INSPIRE) Annual Update

Gerald Chouinard, Principal; Janet Stout, Superintendent; and Kris Cochran, Administrator and Special Education Coordinator, represented INSPIRE.

Mr. Chouinard provided an update regarding the status of the school.

10. Palouse Prairie School of Expeditionary Learning (PPSEL) Annual Update

Summer Clayton, Executive Director, represented PPSEL.

Ms. Clayton provided an update regarding the status of the school.

Commissioner Hallett cited concerns regarding PPSEL's fiscal status, noting that the extra funding received during the school's early years will no longer be available. He encouraged PPSEL to rethink using the IRI as an educational standard.

Ms. Clayton agreed but has had difficulty convincing the board not to look at the IRI as a measurable outcome.

Commissioner Hallett indicated PPSEL can still publish the IRI data, and not use it as a measureable outcome.

Ms. Clayton said every year PPSEL has had a budget carryover and she feels that the school will avoid financial crisis. Teachers are paid less than at other schools and have not received a salary increase in three years. One option is more aggressive fundraising, but with two other charter schools and a private school in the area, in addition to Moscow being a small community, this will be a challenge.

Chairman Reed excused himself at 1:00 pm. Gayann DeMordaunt, PCSC Vice Chair, presided for the remainder of the meeting.

11. Richard McKenna Charter High School (RMCHS) Annual Update

Larry Slade represented RMCHS.

Mr. Slade provided an update regarding the status of the school. He noted that increased virtual options throughout Idaho's public schools may present challenges to RMCHS's online enrollment.

Commissioner Hallett encouraged RMCHS to use Skype for teacher interaction.

Commissioner O'Donahue commended RMCHS for a strong budget, as well as monitoring and understanding fixed costs. She also commended the school for a 93% approval rating in student surveys. She encouraged RMCHS to increase public awareness of the school as an option.

12. Vision Charter School Annual (Vision) Update & Proposed Charter Amendment

Andy Marshall, Site/Building Committee Head and Board Member; and Wendy Oldenkamp, Administrator, represented Vision.

Ms. Oldenkamp provided an update regarding the status of the school. She introduced a proposed charter amendment allowing the high school to double in size.

Commissioner Hallett asked whether Vision has anticipated potential cultural changes with the addition of a larger high school.

Ms. Oldenkamp said long conversations with the board and staff have been held, and the growth will take place slowly, primarily through retention of younger Vision students.

Commissioner Quinn complimented the Vision staff and board for their efforts.

M/S (Hallett/Quinn): To approve the proposed charter amendment permitting the doubling of high school grades as submitted by Vision Charter School. *The motion passed unanimously.*

M/S (Hallett /Quinn): To adjourn the meeting. *The motion passed unanimously.*

The meeting was adjourned at 1:43 p.m.

SUBJECT

Rolling Hills Public Charter School Corrective Action Plan

APPLICABLE STATUTE, RULE, OR POLICY

I.C. 33-5209(2)
IDAPA 08.02.04.301.03

BACKGROUND

Rolling Hills Public Charter School (RHPCS) is a public charter school authorized by the Public Charter School Commission (PCSC). RHPCS has operated in Boise since 2005.

On December 15, 2011, the PCSC moved to issue to RHPCS a notice of defect (NOD) on the grounds that the school had committed a material violation of a condition, standard or procedure set forth in the approved charter, specifically, Bylaws Article IV with regard to board elections. Board member elections were not held in accordance with the timeline described in the bylaws.

Additionally, the PCSC requested that board members be present at the February 9, 2012, PCSC meeting to present a corrective action plan (CAP).

DISCUSSION

RHPCS has provided a CAP describing established procedures and a timeline for completion of board elections by February 2, 2012. Documentation of this plan is included with these materials.

However, the RHPCS board decided in a February 1, 2012, meeting to postpone elections due to stakeholder concerns about the process. An updated CAP has been requested, but not yet received.

IMPACT

No action is required of the PCSC in response to corrective action plans or updates thereto.

Pursuant to I.C. 33-5209(3) and IDAPA 08.02.04.301.04, the public charter school must “comply with the terms and conditions of the corrective action plan and...cure the defect at issue within a reasonable time...” If the public charter school fails to comply with the plan and cure the defect, “the authorized chartering entity may provide notice to the public charter school of its intent to revoke the charter.”

The PCSC may, at its discretion, formally acknowledge the lifting of a notice of defect in the event the PCSC believes the school has cured such defect.

February 9, 2012

If the PCSC determines that the school has failed to cure an identified defect within a reasonable period of time, the PCSC may issue a notice of intent to revoke the charter.

STAFF COMMENTS AND RECOMMENDATIONS

Staff has no recommendations or comments.

COMMISSION ACTION

Any action would be at the discretion of the PCSC.

February 9, 2012



IDAHO PUBLIC CHARTER SCHOOL COMMISSION

650 W. State Street • P.O. Box 83720 • Boise, ID 83720-0037

208/334-2270 • FAX: 208/334-2632

e-mail: charter@osbe.idaho.gov

December 23, 2011

Rolling Hills Public Charter School
Board of Directors
8900 N Horseshoe Bend Road
Boise, ID 83714

Dear RHPCS Board of Directors:

As you are aware, Idaho Code § 33-5209 requires an authorized chartering entity to provide written notice of defect to any school which it has reason to believe has committed a defect. This letter is to serve as written notice of defect to RHPCS on the following grounds:

1. RHPCS has committed a material violation of a condition, standard or procedure set forth in the approved charter; specifically, Bylaws Article IV with regard to board elections.

Pursuant to IDAPA 08.02.04.301.03, please submit to the Public Charter School Commission office by January 11, 2012, a corrective action plan detailing the means by which RHPCS will cure these defects.

Please note that representation by members of the RHPCS board is required at the February 9, 2012, PCSC meeting to address this matter.

As always, you are welcome to contact me any time I may be of assistance.

Sincerely,

A handwritten signature in black ink, appearing to read "Baysinger", with a long horizontal flourish extending to the right.

Tamara L. Baysinger
Public Charter School Commission Director

Cc: Michelle Clement Taylor, School Choice Coordinator, SDE
Dr. John Montgomery, Administrator, RHPCS

February 9, 2012

ROLLING HILLS PUBLIC CHARTER SCHOOL
8900 HORSESHOE BEND RD.
BOISE, ID 83714
939-5400

January 24, 2012

Idaho Public Charter School Commission
PO Box 83720
Boise, ID 83720-0037

Dear Charter Commission Board Members, Ms. Baysinger & Ms. Campbell:

This letter outlines the timeline for our election process and what has been completed to date.

January 17, 2012: Board Director Applications received. Eight applications were received. There are currently 3 parent seats and 1 community member seat up for election.

January 18th – 20th: Board member review of applications. Any possible conflicts of interest were discussed with the school attorney. Two possible conflicts of interest were identified and applicants were notified. The first possible conflict of interest identified was the application received from the spouse of a school employee. The employee decided to resign from employment in order to eliminate any possible appearance of a conflict of interest. The second applicant was ineligible to participate in the election due to the lessee/lessor relationship that exists with the school. An additional application was not filled out completely. This application was completed and resubmitted by applicant. There are 7 parents running for the 3 available parent Board seats and no community applicants for the 1 available community Board seat.

January 23, 2012: Candidates were announced on the school website and an e-mail concerning the candidates and voting was sent to parents and staff. A hardcopy of the same note will be sent home with students January 24, 2012. Board candidate applications are posted on the school website for stakeholder review.

January 26, 2012: A Meet & Greet is planned from 3:00 to 4:00 p.m. in the school café to give parents an opportunity to meet candidates and ask questions.

February 2, 2012: Voting will be held from 7:00 am to 7:30 pm at Rolling Hills Charter School. The Board meeting will begin at 7:30 pm with the Clerk and

February 9, 2012

Administrator counting ballots in the Open Session. New Board members will be announced and will be sworn in at the next Board meeting, which is tentatively planned for February 23, 2012. Board members will review/discuss any changes/additions to the election process and Board Director Application at the February 2nd Board meeting. The Board will also discuss the next Board election date as set forth in the Rolling Hills Charter and Bylaws.

March 8, 2012: At this regular monthly Board meeting, the Board will approve a modified election process, if not previously adopted.

Sincerely,

Niki Crow
Clerk, Board of Directors
Rolling Hills Charter School



SEEKING RHPCS SCHOOL BOARD NOMINEES

*Applications Currently Being Accepted.
Application must be submitted no later than
Tuesday, January 17, 2012 by 5:00 p.m.*

The time for RHPCS School Board elections is upon us. School Board Nominee applications are currently being accepted. Applications are available at the school office, on our website, www.rhpcs.org, or can be emailed to you.

Nominees can be either RHPCS parents or people from the community at large. Please thoughtfully consider actively participating in the success of Rolling Hills by serving as a member of our school board. Not a job for you? Please consider others you know that have the qualities you would like to see in our school board members and talk to them about applying.

Applications must be received by Niki Crow, RHPCS Board Clerk no later than 5 p.m. on Tuesday, January 17, 2012. The application may be returned via regular or electronic mail to the address provided with the application.

Important dates regarding the upcoming RHPCS school board election:

17 January 2012 - Receive Nominee Applications

18-20 January 2012 – Board to Review Applications

23 January 2012 – Announce Candidates

2 February 2012 – Board Election

Should you have any questions or comments, please feel free to contact Cyndee Larson at the school board email: schoolboard@rhpcs.org.

Here's to a great year!

February 9, 2012



Rolling Hills Public Charter School

RHPCS Board Nominee,

Thank you for your interest in Rolling Hills Public Charter School and your willingness to serve on its Board. Nominees interested in serving on the Board must complete the attached application. All applications must be received by Niki Crow, RHPCS Board Clerk, no later than 5 pm, 17 January, 2012. You may return the Application via regular or electronic mail to the following addresses:

RHPCS Board Application
c/o Niki Crow
2208 Windancer
Nampa, Idaho 83686

or

nikicrow@msn.com
RE: RHPCS Board Application

When completing the Nominee Application, please indicate whether you wish to run for a one or two year term by writing "1 year" or "2 years" at the top of the first page.

Below is a list of important dates regarding the upcoming election:

- 17 January 2012 - Receive Nominee Applications
- 18-20 January 2012 - Board to Review Applications
- 23 January 2012 - Announce Candidates
- 2 February 2012 - Board Election

In the meantime, should you have any questions or comments, please feel free to contact Cyndee Larson at the school board email: schoolboard@rhpcs.org.

Here's to a great 2011-2012!

Sincerely,

Cyndee Larson
RHPCS Board Chairman

SUBJECT

Blackfoot Charter Community Learning Center Corrective Action Plan and Proposed Charter Amendments

APPLICABLE STATUTE, RULE, OR POLICY

I.C. 33-5209(2)
IDAPA 08.02.04.301.03

BACKGROUND

Blackfoot Charter Community Learning Center (BCCLC) was originally authorized by the Blackfoot School District #55 and began operations in Fall 2000. In April 2010, the Public Charter School Commission (PCSC) approved a transfer of authorizing authority to the PCSC.

In December 2011, BCCLC was issued a notice of defect (NOD) on the grounds of failure to demonstrate fiscal soundness. They were also issued a NOD on the grounds of material violation of a condition, standard, or procedure set forth in the approved charter with regard to the enrollment cap, which the school knowingly and intentionally exceeded.

DISCUSSION

BCCLC will present a corrective action plan (CAP) regarding steps that will be taken to ensure fiscal soundness and become compliant with the enrollment cap as set forth in their charter.

1. To address the fiscal soundness violation, BCCLC has provided a CAP that describes where and how expenses have been cut. School officials report saving a total of \$142,407 in the FY12 budget. The savings are being realized through reducing expenditures related to field trips, software purchases, equipment purchases, travel/purchased services, para-educator wages, and medical benefits. The school is also considering elimination of four aide positions and a part time librarian. However, the purported savings cannot be verified as PCSC staff has been unable to track the changes to BCCLC's budgets, which reflect little variation in dollar amounts for given line items between winter 2011 and the present.

Other actions being taken by the school include hiring a part time grant writer and negotiating with the Bank of Idaho in an attempt to obtain a loan against land owned by BCCLC. The school reports that the bank has verbally indicated willingness to loan the school about \$45,000, but written documentation is unavailable.

BCCLC indicates that all aspects of the fiscal plan were implemented at the beginning of FY12. As of January 1, 2012, 49% of the budget had been expended.

2. To address the violation of the charter by intentional enrollment beyond the approved cap, BCCLC has provided a CAP that outlines proposed amendments to the charter. The school proposes the addition of approximately 40 students per year over an eight-year period. The overall enrollment cap would increase from 300 to 600, with a cap of 100 students per grade level and no more than 25 per mixed-grade class. The amendment would allow for two, new classes to be added each year.

To accommodate the planned expansion, new facility construction will be necessary by the end of the 2012-2013 school year. The facility will be located adjacent to ISTCS, on 3 acres of land owned by BCCLC.

Budgets submitted by the school purport that the school's fiscal viability will not be threatened regardless of whether the amendment is approved or denied; however, the "not approved" budget projects enrollment increases beyond that currently permitted by the charter. The school claims these unauthorized increases will be necessary to accommodate students moving up from lower grades; this is likely the result of BCCLC's unauthorized expansion in Fall 2011 for which the NOD was issued, though this is difficult to verify due to inconsistencies in the expansion plans provided by the school.

BCCLC representatives maintain that the PCSC agreed, upon approval of the transfer from district to PCSC authorization, to approve future expansion of the school. However, PCSC meeting minutes clarify that the school was advised that the PCSC would not approve an expansion until the school has demonstrated successful and compliant operations for a period of time.

In addition to the enrollment cap change, BCCLC is proposing two other amendments to its charter. These would:

1. Revise the mission statement to better reflect the school's focus, and
2. Amend the MSES to eliminate references to the DMA and DWA, which are no longer required, and alter the remaining standards to indicate that BCCLC's standardized test results will meet or exceed state targets. The proposed amendment removes the requirement that 80% of BCCLC's students in grades 3-5 show one year of growth on an annual basis.

The proposed MSES amendments do not meet the PCSC's requirements for new petitions, which must include MSES comparing the public charter school's results to district and state results. Additionally, the submission contains a significant number of typographical errors that poorly represent the quality of education offered by the school.

IMPACT

No action is required of the PCSC in response to corrective action plans or updates thereto.

Pursuant to I.C. 33-5209(3) and IDAPA 08.02.04.301.04, the public charter school must “comply with the terms and conditions of the corrective action plan and...cure the defect at issue within a reasonable time...” If the public charter school fails to comply with the plan and cure the defect, “the authorized chartering entity may provide notice to the public charter school of its intent to revoke the charter.”

The PCSC may, at its discretion, formally acknowledge the lifting of a notice of defect in the event the PCSC believes the school has cured such defect.

If the PCSC determines that the school has failed to cure an identified defect within a reasonable period of time, the PCSC may issue a notice of intent to revoke the charter.

If the PCSC approves any or all of the proposed charter amendments, the school will begin operating under the amended charter. If the PCSC denies the proposed charter amendments, the school could appeal this decision to the State Board of Education, or could decide not to proceed any further.

STAFF COMMENTS AND RECOMMENDATIONS

Staff is concerned that BCCLC’s lack of proactive communication, in addition to extremely inaccurate past budgetary projections, cast doubt on the reliability of the budgets submitted for this meeting. Therefore, staff recommends that the PCSC require monthly fiscal updates and submission of a five-year budget.

Staff recommends that the PCSC consider whether a school whose fiscal status is questionable, whose ISAT results are poorer than district and state results in most grades and subject areas, whose MSES have not been met for two years, whose facility is already inadequate, and whose history of non-compliance includes notification of four defects over the past year, is a good candidate for expansion that would more than double the school’s current enrollment.

Staff further recommends that the PCSC deny the proposed amendments to the school’s MSES, with the understanding that the amendment will be reconsidered when it meets the same requirements as those of new petitions before the PCSC, which must include comparisons to district and state results.

Finally, staff recommends approval of the proposed charter amendment related to the mission statement.

February 9, 2012

COMMISSION ACTION

A motion to deny Blackfoot Charter Community Learning Center's proposed charter amendments related to the mission statement, enrollment increases and/or measurable student education standards.

OR

A motion to approve Blackfoot Charter Community Learning Center's proposed charter amendments related to the mission statement, enrollment increases and/or measurable student education standards.

Moved by _____ Seconded by _____ Carried Yes _____ No _____

February 9, 2012



IDAHO PUBLIC CHARTER SCHOOL COMMISSION

650 W. State Street • P.O. Box 83720 • Boise, ID 83720-0037
208/334-2270 • FAX: 208/334-2632
e-mail: charter@osbe.idaho.gov

December 23, 2011

Blackfoot Charter Community Learning Center
Board of Directors
2801 Hunters Loop
Blackfoot, ID 83221

Dear BCCLC Board of Directors:

As you are aware, Idaho Code § 33-5209 requires the authorized chartering entity of a public charter school to provide written notice of defect to any school which it has reason to believe has committed a defect. The letter is to serve as written notice of defect to Blackfoot Charter Community Learning Center on the following grounds:

1. Failure to demonstrate fiscal soundness as defined by I.C. 33-5209(2)(d).
2. Material violation of a condition, standard or procedure set forth in the approved charter, specifically, Tab 2 "Enrollment Cap" with regard to both class sizes and growth rate.

In accordance with IDAPA 08.02.04.301.03, please submit to the PCSC office by January 23, 2012, a corrective action plan detailing the means by which these defects will be cured.

Sincerely,

A handwritten signature in cursive script, appearing to read "T. Baysinger".

Tamara L. Baysinger
Public Charter School Commission Director

Cc: Michelle Clement Taylor, School Choice Specialist, State Department of Education
Fred Ball, Administrator, BCCLC

February 9, 2012

Blackfoot Charter Community Learning Center
Corrective Action Plan
January 19, 2012

Defect #1 Failure to demonstrate fiscal soundness as defined by I.C. 33-5209(2)(d).

This code states the following:

(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;

During FY11, BCCLC recognized that in order to continue to grow and meet the demand for charter education in this area, the school would be required to plan well into the future. With this in mind, the Board developed a 10 year strategic growth plan. As this plan evolved, it became evident that new construction would be essential. Given this, the board made decisions to purchase 1) a new school bus and 2) purchase approximately 4 acres of land. These decisions were not lightly considered. It was recognized that the FY12 budget would need to be scaled back in order for the school to remain fiscally sound. The following action plan was developed and implemented at that time.

1. The FY12 budget was carefully developed to ensure all fiscal obligations could be met.
2. Major reductions would be implemented in the following areas:
 - Media center expenses
 - Field trips and other transportation expenses
 - New software purchases
 - New equipment purchases
 - Teacher and administrative travel and purchased services
 - Employee medical benefits
3. Mr. Elzo White, retired Superintendent from Snake River School District #52, along with the Board of Directors would review monthly expenses to ensure fiscal soundness.
4. The budget will provide a reserve balance at the end of the fiscal year
5. A part time grant writer would be employed to help the school find and secure additional funding sources.
6. A backup plan in case of emergency would be developed and include:
 - Additional areas, including personnel expenses where cuts could be made
 - Options for increased revenue, include bank assistance

February 9, 2012

7. Development of an FY13 budget that would continue to meet all expenses and continue to build the reserve balance

Progress in meeting this plan:

1. A balanced FY12 Budget was developed and is being carefully followed
2. This budget included reductions in all areas listed. All paraeducators were moved to part time status. Medical benefit expenses were reduced for all employees.
3. In addition to monthly budget reviews, Mr. White has met with Mr. Ball periodically
4. The FY12 budget provides for an estimated \$48,000 reserve
5. A part time grant writer has been hired. Currently BCCLC has received over \$22,000 from her efforts.
6. In case of emergency, BCCLC has a plan to eliminate certain classified positions; also a mortgage loan for the land already purchased is available, if needed from Bank of Idaho
7. The FY13 projected budget has been developed and will continue to ensure fiscal soundness. A copy of this was submitted in the Budget Template.

As of January 1, 2012 the fiscal year is 50% completed. BCCLC is on track, having expended 49% of its budget at this point.

Defect #2 Material violation of a condition, standard or procedure set forth in the approved charter, specifically Tab 2 "Enrollment Cap" with regards to both class sizes and growth rate.

BCCLC has developed proposed revisions to its charter that address the class size and growth rate concerns. These were not finalized in time to meet the 30 day submission requirement; hence they were not included in the school's Annual Report. All charter amendments have gone to the SDE for a sufficiency review. However, based on Ms. Keelie Campbell's Oct. 25, 2011 email indicating that amendments dealing with enrollment do not need the SDE sufficiency review, BCCLC proposes the following amendments to Tab 2 of its charter:

Effects of Enrollment Growth

~~At the beginning of the 2009-2010 school year, BCCLC's waiting list included nearly 150 students. For 2011-2012 2010-11, the school will add two modular classrooms and increase its enrollment by approximately 40 students for 2010-2011. Another modular unit and 20 students will be added in 2011-2012. This pattern of adding 20- approximately 40 students each year will be followed for an addition eight year period. Current facilities provide sufficient space for 6 modular classrooms, and approximately 120 additional students. By the end of the 2012-2013 school year, new construction will be necessary.~~

Enrollment Cap

BCCLC's enrollment cap is ~~300~~ **600**. Current enrollment is 220 students. The school's ~~plan is to grow to 300, with~~ will have a cap of ~~50~~ **100** students per grade level, and no more than 25 students per classroom. ~~The school will endeavor to maintain small class sizes.~~ The school's strategic plan for growth will be a gradual process, adding ~~one~~ **two** new class per year.

Strategic Growth Plan

In order to manage growth and ensure an unbiased student selection process, BCCLC's strategic growth model is designed to build from the bottom up. That is, new classes will be added at the kindergarten level and expansion above that will occur as these students move each year. By following this model, there will never be a time when large numbers of students enters the school at a grade beyond kindergarten. The number of openings in grades above kindergarten will primarily be determined by non-returning individuals.

Because classes at BCCLC are multi-age, at the end of each school year students are assigned to their next year's classroom based on the best placement to meet their individual needs. Each classroom generally follow a grade-level curriculum, but individual differentiation is key to meeting each student's needs. To illustrate, a classroom may have second, third, and fourth grade students with a curriculum that is predominantly fourth grade. Placement in that classroom is not based on age; nonetheless, when openings occur for new students, these would be filled from the fourth grade lottery list.

By adopting this growth model, BCCLC recognizes that for a number of years grade level numbers will be uneven and skewed toward the lower end, but over time these will balance out.

February 9, 2012

From: Fred Ball [fball@bcclc.com]
Sent: Monday, January 23, 2012 3:15 PM
To: Keelie Campbell
Cc: Elzo White; Emily Hansen; J heintzelman; Kendall Murdock; Stacey Lilya
Subject: RE: BCCLC CAP and charter amendments

Keelie,

The following chart will answer your questions regarding specific areas of the budget that were targeted for reductions this year:

BCCLC reductions for FY 12

	FY 11 expense	FY12 allocation	estimated savings
Media Center	\$350.00	\$90.00	\$250.00
field trips, extra transportation	\$4,758.36	\$1,200.00	\$3,558.36
software purchases	\$12,645.30	\$0.00	\$12,645.30
new equipment purchases	\$6,439.40	\$0.00	\$6,439.40
travel/purchased services	\$99,094.32	\$28,880.00	\$70,214.32
medical benefits	\$178,345.66	\$129,045.66	\$49,300.00
total reductions:			\$142,407.38

FY12 Grants:

- 15,200 First Books. Must be used for purchase of books
- 2,000 Shutterfly grant. Can be used for any purpose
- 8,300 Small Rural Achievement Program (REAP) Grant Can be used for any purpose

Possible additional areas where cuts can be made:

Eliminate 2 kindergarten aide positions, 1 first grade aide position, 1 second grade aide position, 1 part-time librarian position.

We have discussed with our bank (Bank of Idaho) the possibility of securing a loan against the land we purchased. We have not formally completed a loan packet, but the land has been appraised and the bank has verbally indicated that based upon that appraisal they would be willing to loan \$45,720. We do not intend to complete this loan unless we are absolutely forced to do so. At this point it is a worst case scenario option.

Savings BCCLC recouped by moving Paraeducators to part-time: \$32,500 (\$325 per month for 10 employees for 10 months).

Medical benefit savings by reducing benefits to full-time employees (\$50/month = savings of \$1,400 per month times 12 months = \$16,800)

All aspects of this plan were implemented at the beginning of FY12. As of January 1, 2012, the fiscal year is 50% completed. BCCLC's budget is on track, having expended 49% of its budget at that point.

Fred

From: Keelie Campbell [mailto:Keelie.Campbell@osbe.idaho.gov]
Sent: Friday, January 20, 2012 2:30 PM
To: Fred Ball
Subject: RE: BCCLC CAP and charter amendments

February 9, 2012

Fred,

In reviewing your corrective action plan, more information is needed:

- Please outline all mentioned reductions in detail including each category with before and after figures and the total savings.
- What grants have been received and what are the funds from them tied to?
- What are the additional areas where cuts can be made?
- How is the bank assisting with increased revenue?
- Para educator before and after figures and total savings by moving them to part time
- Medical benefit before and after and total savings from reduction of benefits
- Which classified positions are part of the emergency plan cuts?
- Please provide bank documentation regarding the mortgage loan for land already purchased
- Please include a timeline for all items on the corrective action plan

Thank you for your cooperation in providing the requested materials in a timely manner. Please submit all requested information by Wednesday January 25.

Keelie Campbell
Idaho State Board of Education
Charter School Program Manager
208-332-1585

From: Fred Ball [<mailto:fball@bcclc.com>]
Sent: Friday, January 20, 2012 12:23 PM
To: Keelie Campbell
Cc: Elzo White; Emily Hansen; J heintzelman; Kendall Murdock; Stacey Lilya
Subject: BCCLC CAP and charter amendments

Keelie,

Attached is BCCLC's CAP. As the board was finishing work on this at their meeting last night, it was discovered that I had sent you the wrong version of our proposed charter amendments. Specifically, the version you have contains an error (incorrect paragraph) listed under the "Enrollment Cap" section, and did not include Appendix H. I have attached the correct version, but if it is too late for submission, we will need to reschedule for the April meeting and present there. I should note that the version presented to the SDE for their sufficiency Review was the correct version as attached here. Sorry for the error.

Thanks,

Fred

Blackfoot Charter Community Learning Center Dec. 31, 2011	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
REVENUE					Based on 220 confirmed enrollment as of August 21,201C		
Salary Apportionment	\$459,860.00	\$317,343.40	\$459,860.00	69.01%	from SBA formula		
Benefit Apportionment	\$82,959.00	\$56,764.77	\$82,959.00	68.43%	from SBA formula		
Entitlement	\$196,260.00	\$133,354.81	\$196,260.00	67.95%	based on 10 units as calculated by SDE Support Unit Claculation formul		
State Transportation	\$33,200.00	\$23,661.00	\$33,200.00	71.27%			
Lottery	\$7,500.00	\$8,041.00	\$7,500.00	107.21%			
Other State Funds (Specify)	\$22,800.00	\$13,890.00	\$22,800.00	60.92%	includes remediation funds.		
Special Ed - Regular	\$29,018.00		\$29,018.00	0.00%			
Special Ed - ARRA	\$0.00		\$0.00	#DIV/0!			
Title I	\$18,097.00		\$18,097.00	0.00%	approval pending		
Federal Title I Funds : ARRA	\$0.00		\$0.00	#DIV/0!			
Medicaid Reimbursement	\$0.00		\$0.00	#DIV/0!			
Title IIA	\$0.00		\$0.00	#DIV/0!			
Local Revenue (Specify)	\$2,120.00	\$543.75	\$2,120.00	25.65%			
Federal Startup Grant				#DIV/0!			
Other Grants (Specify)				#DIV/0!			
Fundraising				#DIV/0!			
Interest Earned	\$120.00	\$36.48	\$120.00	30.40%	From bank accounts		
Other (Specify)				#DIV/0!			
Other (Specify)				#DIV/0!			
TOTAL REVENUE	\$851,934.00	\$553,635.21	\$851,934.00	64.99%			\$0.00
EXPENDITURES							
100 Salaries							
Teachers	\$289,962.00	\$144,880.62	\$289,962.00	49.97%	includes IT/networking consultant		
Special Education	\$31,500.00	\$15,784.65	\$31,500.00	50.11%	1.0 FTE		
Instructional Aides	\$46,300.00	\$23,256.49	\$46,300.00	50.23%	5.25 FTE		
Classified/Office	\$12,210.00	\$5,764.48	\$12,210.00	47.21%	.80 FTE		
Administration	\$63,650.00	\$31,650.96	\$63,650.00	49.73%	1.0 FTE		
Maintenance	\$21,500.00	\$8,702.33	\$21,500.00	40.48%	custodial position		
Other (Specify)	\$12,500.00	\$7,997.84	\$12,500.00	63.98%	bus drivers		
Other (Specify)	\$3,500.00		\$3,500.00	0.00%	new ramp for modualr classroom		
Total Salaries	\$481,122.00	\$238,037.37	\$481,122.00	49.48%			
200 Employee Benefits							
PERSI/FICA/Benefits	\$57,500.00	\$27,536.75	\$57,500.00	47.89%	PERSI		
Other (Specify)	\$67,500.00	\$32,284.32	\$67,500.00	47.83%	health insurance benefits		
Total Benefits	\$125,000.00	\$59,821.07	\$125,000.00	47.86%			
300 Purchased Services							
Management Services				#DIV/0!			
Staff Dev/Title IIA	\$0.00		\$0.00	#DIV/0!	costs included in teacher contracts		
Legal Pub/Advertising	\$230.00		\$230.00	0.00%			
Legal Services	\$0.00		\$0.00	#DIV/0!			
Special Education	\$4,750.00	\$2,470.47	\$4,750.00	52.01%	Speech and Occupational therepy		
Liability & Property Ins	\$7,500.00	\$3,232.38	\$7,500.00	43.10%			
Substitute Teachers	\$3,300.00	\$2,086.00	\$3,300.00	63.21%			
Board Expenses	\$500.00		\$500.00	0.00%			
Computer Services	\$0.00		\$0.00	#DIV/0!	IT consultant/network admin expenses		
Transportation	\$2,400.00	\$1,546.58	\$2,400.00	64.44%	bus driver training, tracher inservice expenses		
Travel	\$2,200.00	\$1,379.60	\$2,200.00	62.71%	estimated 3 trips to Boise, 2 to Twin Falls		
Other (Specify)	\$8,000.00	\$1,121.33	\$8,000.00	14.02%	building care and maintenance		
Other (Specify)	\$0.00		\$0.00	#DIV/0!			
Total Services	\$28,880.00	\$11,836.36	\$28,880.00	40.98%			\$0.00
Facilities							
Building Lease	\$0.00		\$0.00	#DIV/0!			

Land Lease	\$0.00		\$0.00	#DIV/0!		
Modular Lease	\$0.00		\$0.00	#DIV/0!		
Utilities, Phones, Lndscp	\$17,400.00	\$6,735.67	\$17,400.00	11.99%		
Site Preparation	\$0.00		\$0.00	#DIV/0!		
Other (Specify)				#DIV/0!		
Other (Specify)				#DIV/0!		
Total Facilities	\$17,400.00	\$6,735.67	\$17,400.00	38.71%		\$0.00
400 Supplies and Maintenance						
Textbooks	\$24,000.00	\$9,452.59	\$24,000.00	39.39%		
School Supplies	\$6,800.00	\$7,476.87	\$6,800.00	109.95%	instructional consumables and supplies	
Power School				#DIV/0!		
Custodial Supplies	\$8,200.00	\$7,436.51	\$8,200.00	90.69%	cleaning and maintenance supplies	
Other (Specify)	\$3,000.00	\$3,909.85	\$3,000.00	130.33%	pupil transportation supplies	
Other (Specify)				#DIV/0!		
Total Supplies	\$42,000.00	\$28,275.82	\$42,000.00	67.32%		\$0.00
500 Capital Objects						
Furniture				#DIV/0!		
Technical AV Equipment				#DIV/0!		
Other (Specify)	\$11,500.00	\$11,500.00	\$11,500.00	100.00%	purchase of 2 classroom modular unit	
Other (Specify)				#DIV/0!		
Other (Specify)				#DIV/0!		
Other (Specify)				#DIV/0!		
Total Capital Objects	\$11,500.00	\$11,500.00	\$11,500.00	100.00%		\$0.00
Debt Service						
Specify	\$73,586.00	\$27,952.14	\$73,586.00	37.99%	Bank of Idaho loan initiated in 2009	
Specify				#DIV/0!		
Specify				#DIV/0!		
Total Debt Service	\$73,586.00	\$27,952.14	\$73,586.00	37.99%		\$0.00
Grant Purchases						
Specify				#DIV/0!		
Specify				#DIV/0!		
Specify				#DIV/0!		
Specify				#DIV/0!		
Specify				#DIV/0!		
Total Grant Purchases	\$0.00	\$0.00	\$0.00	#DIV/0!		\$0.00
Reserve Fund				#DIV/0!		
Building Fund				#DIV/0!		
Total Expenses	\$779,488.00	\$384,158.43	\$779,488.00	49.28%		
Carryover from Previous FY	(\$24,281.00)	\$0.00	(\$24,281.00)	0.00%		\$0.00
Reserve/(Deficit)	\$48,165.00	\$169,476.78	\$48,165.00	351.87%		

Blackfoot Charter Community Learning Center FY13	Proposed Budget	Notes	Difference from "Current Fiscal Year"	
REVENUE		based on enrollment of 225 students, 75 per grade		
Local Revenue	\$1,500.00			
State Revenue				
Entitlement	\$215,886.00	16.4 units as calculated by SDE formula	\$215,885.32	reflects State actual from "current FY"
Wages				
Administration	\$56,313.00	Based on SDE formula for FY13		
Teachers	\$478,487.00	Based on SDE formula for FY13		
				reflects all salaries compared to State actual
Classified	\$82,114.00	Based on SDE formula for FY13	\$616,913.31	from "current FY"
Medicaid			\$0.00	reflects projected from "current FY"
Benefit	\$96,478.00	Based on SDE formula for FY13	\$34,199.29	reflects State actual from "current FY"
Transportation	\$34,200.00		\$34,199.29	
Federal Revenue				
Title I	\$22,500.00		#DIV/0!	reflects State actual from "current FY"
Special Ed	\$31,000.00		#DIV/0!	reflects State actual from "current FY"
Title II			#DIV/0!	reflects State actual from "current FY"
Startup Grant			#DIV/0!	reflects State actual from "current FY"
Other Sources (Specify)				
Other Sources (Specify)				
Other Sources (Specify)				
Total Revenue before holdback	\$1,018,478.00		#DIV/0!	
PROPOSED HOLDBACK		Holdbacks should be estimated at a minimum of 5% - 5.5% for FY 2011.		
Teacher Salaries				
Classified Salaries				
Admin Salaries				
Benefits				
Entitlement				
Transportation				
Total Holdback	\$0.00		\$0.00	there were no holdbacks last year
Total Revenue after holdback	\$1,018,478.00		\$1,018,477.35	reflects State actual from "current FY"
EXPENDITURES				
100 Salaries				
Teachers	\$351,820.00	13.5 FTE	61,858.00	reflects projected from "current FY"
Admin	\$63,650.00	1.0 FTE	0.00	reflects projected from "current FY"
Classified	\$61,300.00	6.25 FTE includes paraeducators and office personnel	49,090.00	reflects projected from "current FY"
Special education	\$31,500.00	1 FTE		
Other (Specify)	\$21,500.00	custodial		
Other (Specify)	\$14,500.00	bus drivers		
Total Salaries	\$544,270.00		110,948.00	
200 Benefits				
Benefit Dollars				
PERSI/Payroll taxes	\$61,500.00			
Other (Specify)	\$71,500.00			
Total Benefits	\$133,000.00		\$8,000.00	reflects projected from "current FY"
300 Purchased Services				
Transportation	\$480.00	new driver training	(\$1,920.00)	reflects projected from "current FY"
Special Education	\$4,400.00		(\$350.00)	reflects projected from "current FY"
Proctor costs				
Legal			\$0.00	reflects projected from "current FY"
Insurance	\$16,800.00		\$9,300.00	reflects projected from "current FY"
Copier Lease	\$2,600.00		\$2,600.00	
Printer Lease			\$0.00	
Facility Lease	\$0.00		\$0.00	reflects projected from "current FY"
Utilities	\$23,100.00		\$5,700.00	reflects projected from "current FY"
Professional Development			\$0.00	reflects projected from "current FY"
Technology	\$9,800.00		\$9,800.00	reflects projected from "current FY"

February 9, 2012

UPCOMING FISCAL YEAR BUDGET COMPARISON

Management Services			\$0.00	reflects projected from "current FY"
Legal Publications/Advertising	\$1,200.00		\$970.00	reflects projected from "current FY"
Substitute Teachers	\$3,600.00		(\$6,900.00)	reflects projected from "current FY"
Board Expenses	\$600.00		\$100.00	reflects projected from "current FY"
Other (Specify)				
Other (Specify)				
Total Purchased Services	\$62,580.00		\$19,300.00	
Supplies & Materials				
Teacher/Classroom	\$22,000.00		\$15,200.00	reflects projected from "current FY"
Office	\$2,200.00		\$2,200.00	Not in 2010 budget.
Janitorial	\$1,500.00		(\$6,700.00)	reflects projected from "current FY"
Textbooks	\$3,300.00		(\$20,700.00)	reflects projected from "current FY"
Other (Specify)	\$3,600.00	bus and transportation supplies		
Other (Specify)				
Total Supplies & Materials	\$32,600.00		(\$10,000.00)	
Grant Expenditures				
Specify				
Specify				
Specify				
Total Grant Expenditures	\$0.00			
Capital Outlay			\$0.00	
Total Capital Outlay	\$0.00		\$0.00	
Debt Retirement			\$0.00	
Total Debt Retirement	\$96,000.00		\$0.00	
Insurance & Judgements			\$0.00	
Total Insurance & Judgements	\$0.00		\$0.00	
Transfers			\$0.00	
Total Transfers	\$0.00		\$0.00	
Contingency Reserve	\$0.00			
Building Fund	\$100,000.00			
Total Expenditures	\$968,450.00		\$128,248.00	
Carryover from Previous FY	\$48,165.00	Reflects projected reserve/(deficit) from "current year" worksheet		
Reserve/(Deficit)	\$98,193.00			

February 9, 2012



Blackfoot Charter Community Learning Center
2801 Hunters Loop
Blackfoot, ID 83221
208-782-0744
Fax 208-782-1330

January 24, 2012

Idaho Public Charter School Commission
650 West State St Room 307
Boise, ID 83702

Dear Commission:

Blackfoot Charter Community Learning Center wishes to submit four amendments to its existing charter. The first of these deals with its mission statement. As the school has matured and academic programs have been refined, stakeholders have carefully and thoughtfully considered the need for a more definitive statement of the school's mission. This amendment is the product of those efforts.

The second amendment is a rewrite of Tab 2, dealing with the effects of enrollment growth. BCCLC wished to do all it can to meet the demands for added school choice in this area, but at the same time, ensure that growth is gradual and controlled. This amendment seeks to revise the enrollment cap to 600 and also adds a section entitled "Strategic Growth Plan" that helps to define how the school can manage growth and ensure an unbiased student selection process in a multi-age classroom environment.

The third proposed amendment modifies BCCLC's Measurable Student Educational Standards by eliminating the Direct Math Assessment, eliminating the Direct Writing Assessment, aligning IRI achievement standards with state targets, and aligning ISAT standards with AYP Proficiency Targets.

The final amendment is the addition of Appendix H, which contains a chart outlining enrollment growth through the 2018-2019 school year.

Thank you.

A handwritten signature in black ink, appearing to read 'Fred Ball', is written over the typed name.

Dr. J. Fred Ball
Director
Blackfoot Charter Community Learning Center

Signatures of Qualified Electors

See Appendix A.

Mission Statement

~~The mission of the Blackfoot Charter Community Learning Center is to provide students ages five through twelve, grade levels kindergarten through sixth, a student centered environment designed to improve the way information is perceived and processed. We enhance learning skills and academic building blocks that foster high achievement in academic and behavioral standards, which encourages self motivation and lifelong learning.~~

The mission of the Blackfoot Charter Community Learning Center is to know each student well enough to challenge and meet their individual academic and developmental needs. This is accomplished through a goal-driven environment that includes multi-grade classrooms, small groups, interactive technology, and brain based learning. These are supported by a high level of teacher collaboration and professional development.

Vision Statement

The vision of Blackfoot Charter Community Learning Center is to create a school that incorporates the very best instructional techniques supported by brain-based learning research. All learning activities will focus on the individual needs of each student. Our goal is to create a school where learning is fun, challenging, and meaningful to each individual. Students will gain a strong sense of self-worth and a respect for others as they receive a solid academic foundation. The academic program at BCCLC will prepare them to become active listeners, critical readers, proficient writers and competent problem solvers.

**TAB 2
PROPOSED OPERATION AND POTENTIAL EFFECTS
FOR THE PUBLIC CHARTER SCHOOL**

Facilities

In 2005, Blackfoot Charter Community Learning Center moved into its newly constructed building at 2801 Hunters Loop, Blackfoot, Idaho. This 8,300 square foot facility includes eight classrooms, 6 offices, a media center, a commons/cafeteria area, restrooms, a faculty workroom, a large, fenced playground and a paved parking lot. There is room to expand through constructing additional classrooms or even adding portable classrooms on site.

Primary Attendance Area

The primary attendance area is the Blackfoot School District; however, students from other areas may be enrolled as per Idaho Code Section 33-5205(3) (j).

Effects of Enrollment Growth

~~At the beginning of the 2009-2010 school year, BCCLC's waiting list included nearly 150 students. For 2011-2012 2010-11, the school will add two modular classrooms and increase its enrollment by approximately 40 students for 2010-2011. Another modular unit and 20 students will be added in 2011-2012. This pattern of adding 20- approximately 40 students each year will be followed for an addition eight year period. Current facilities provide sufficient space for 6 modular classrooms, and approximately 120 additional students. By the end of the 2012-2013 school year, new construction will be necessary.~~

Based on actual student addresses from the current waiting list, it is anticipated that approximately 50% of BCCLC new growth would come from surrounding school districts, not Blackfoot. There is no elementary charter school option available in the Snake River, Firth, or Shelley School Districts. Many parents from these areas have placed their students on the BCCLC waiting list, even though little chance exists for them to be enrolled.

Enrollment Cap

BCCLC's enrollment cap is ~~300~~ **600**. Current enrollment is 220 students. The school's ~~plan is to grow to 300, with~~ will have a cap of ~~50~~ **100** students per grade level, and no more than 25 students per classroom. ~~The school will endeavor to maintain small class sizes.~~ The school's strategic plan for growth will be a gradual process, adding ~~one~~ **two** new class per year.

Strategic Growth Plan

In order to manage growth and ensure an unbiased student selection process, BCCLC's strategic growth model is designed to build from the bottom up. That is, new classes will be added at the kindergarten level and expansion above that will occur as these students move each year. By following this model, there will never be a time when large numbers of

students enters the school at a grade beyond kindergarten. The number of openings in grades above kindergarten will primarily be determined by non-returning individuals.

Because classes at BCCLC are multi-age, at the end of each school year students are assigned to their next year's classroom based on the best placement to meet their individual needs. Each classroom generally follow a grade-level curriculum, but individual differentiation is key to meeting each student's needs. To illustrate, a classroom may have second, third, and fourth grade students with a curriculum that is predominantly fourth grade. Placement in that classroom is not based on age; nonetheless, when openings occur for new students, these would be filled from the fourth grade lottery list.

By adopting this growth model, BCCLC recognizes that for a number of years grade level numbers will be uneven and skewed toward the lower end, but over time these will balance out. Appendix H contains a chart detailing BCCLC Projected Enrollment Growth through FY20.

Administrative Services

Administrative services are provided by the school Director, with support from the Board of Directors. A full-time secretary handles paperwork and required reporting, and a part-time business manager takes care of the school's fiscal affairs. The Director coordinates with the Charter School Board of Directors, and determines the day-to-day operations of BCCLC.

An independent financial audit is performed each year by an independent, non-affiliated auditor. (not affiliated with BCCLC). Annual programmatic operations and financial reports are prepared and presented to the Board of Directors and Charter Commission as required.

The Director also serves as the liaison between the Board of Directors, the Idaho Charter School Commission (when appropriate) and parents. Funding sources will include state allocation per pupil, federal grants, private grants, business partnerships, and donations. The BCCLC board is ultimately responsible to the Commission and at least one member will be present (in person or via teleconference) at every Commission meeting for which BCCLC is on the agenda.

Potential Civil Liability and Insurance Coverage

BCCLC insures its interests against damage and for liability exposures. Liability and property insurance coverage is similar to the coverage purchased by other charter schools and districts. Proof of insurance will be given to the Public Charter School Commission each time it is renewed. The school will maintain policies of general liability insurance and insure all assets as required by the State. The Idaho State Board of Education and the Idaho Public Charter School Commission shall have no liability for the acts, omissions, debts, or other obligations of this charter school, except as may be provided in an agreement or contract between the state and Blackfoot Charter Community Learning Center.

TAB 4

MEASURABLE STUDENT EDUCATIONAL STANDARDS

Measurable Student Educational Standards

BCCLC will accomplish the following goals:

1. In the core subject areas of Math, Reading, Language Arts, and Science 80% of students will earn a grade of satisfactory or above as calculated by classroom assessments and recorded on quarterly and semester report cards.
2. ~~90% of students in grades K-3 will~~ meet or exceed state targets demonstrate reading competency by scoring proficient on the end of year (spring) Idaho Reading Indicator (IRI).
3. On the Idaho Standard Achievement Test (ISAT) ~~85% of students in grades 3-5 will score proficient or above~~ meet or exceed state performance assessments and AYP standards as defined in the following Idaho AYP Proficiency Targets:

AYP Proficiency Targets			
	2011-2012	2012-2013	2013-2014
Reading	90.4%	90.4%	90.4%
Mathematics	88.7%	88.7%	88.7%
Language Usage	83.4%	83.4%	83.4%

- ~~4. 85% of students in grades 5 will achieve a score of satisfactory or above on the Direct Writing Assessment (DWA).~~
- ~~5. 85% of students in grades 4 will achieve a score of satisfactory or above on the Direct Math Assessment (DMA).~~
- ~~6. 80% of students in grades 3-5 will show at least one year's growth on the ISAT.~~

Methods for Measuring Student Progress

To ensure a consistent and comprehensive evaluation procedure, assessment rubrics have been developed for each of these standards. These include specific and objective evaluation criteria. Teachers have been included in the development of these rubrics in order to provide for their input, ownership, and buy-in.

~~The goal for every teacher at BCCLC is to challenge each student to maximize his or her academic growth. The school's overall academic goal is to accomplish the above standards by the end of the 2012-2013 school year.~~

Method for measuring student progress will include, but not be limited to:

Standard 1:

- Classroom work that demonstrates utilization, integration, and application of acquired information.
- Completion of homework, research, and other assignments as designated by the classroom teacher.
- Demonstration of mastery learning or subject competency through classroom assessments such as quizzes, test, or other measures determined by the teacher.
- Assessment rubrics used for projects, individualized assignments, and other portfolio-type assignments.
- Individual and group scores as calculated on the ISAT and IRI.
- IELA assessment results
- ~~The BCCLC goal is for eighty five percent (85%) of students to improve their personal scores from the previous test, on each of the standardized assessments.~~

The following criteria will also be considered in measuring students' daily and classroom progress:

Communication Skills

Students will communicate with clarity, purpose, and an understanding of audience using a variety of communication forms and skills. Students will develop their talents in music, visual arts, and/or performing arts. Students will develop oral and written skills in a non-native language.

Thinking and Reasoning Skills

Students will utilize, evaluate, and refine the use of multiple strategies to solve a variety of problems.

Social Responsibility and Skills

Students will deal with disagreement and conflict caused by diversity of opinions and beliefs. Students will evaluate and manage their behavior as group members. Students will participate in community service that reflects responsible citizenship in a democratic society.

Expanding and Integrating Knowledge

Students will acquire, and integrate, knowledge and experiences from different subject areas. Students will gather and use subject-area information effectively in order to gain new information, knowledge, classify and organize information, support inferences, and justify conclusions appropriate to the context and audience.

Personal Responsibility

Students will have positive attitudes and perceptions about creating quality work, striving for excellence, and interpersonal skills.

Provisions by Which Students Receive Standardized Testing

Under the direction of the School Test Coordinator, the following standardized tests are conducted in strict accordance with and at the specified intervals mandated by the State of Idaho:

- Idaho Standards Achievement Test– Grades 3-,4,5
- ~~Direct Writing Assessment (State) – Grades 5~~
- ~~Direct Math Assessment (State) – Grades 4~~
- Idaho Reading Indicator – Grades K-3

Additionally, any and all other assessments required in Idaho, now or in the future, will be administered in accordance with state mandates and policies.

Accreditation

BCCLC will complete any accreditation required in IDAPA 08.02.02.140, or other state mandates. In addition, the school will also complete full programmatic audits and self-assessments.

The school has developed a five year strategic plan focused on the improvement of student performance. The strategic plan is monitored by a review team established by the school's administration and Board of Directors. This team is empowered to recommend revision of goals as necessary, and provide regular reports on implementation of the plan to the Board of Directors.

Throughout the strategic planning process, BCCLC complies with all provisions of NCLB. In the event that concerns regarding NCLB standards should arise, steps will be taken by the Director and the Board to identify and target school and individual needs. A comprehensive plan of improvement has been developed and implemented as required by NCLB. This plan is included in the BCCLC Continuous Improvement Plan located on the Idaho Department of Education Website.

Copies of all annual reports including programmatic audit reports, financial audits, school reports cards, testing results, and all other federal, state and local reports are given to the accrediting agency, state officials, and federal agencies. Parents and the public in general are provided with report information, where appropriate or required.

Improvement Planning

BCCLC has developed a Continuous School Improvement Plan based on its strategic plan, and focused on the improvement of student performance. This plan focuses on improving school and staff capacity (structure/resource allocation/teacher skill sets) to increase student achievement. All student and teacher standards meet state-approved standards adopted by the State Board of Education.

The Board of Directors of Blackfoot Charter Community Learning Center provides consultation to the Director regarding ongoing plans for the school. The PAC (Parent Activities Committee) also works with the Board of Directors on school improvement. BCCLC is committed to a school where student success is our top priority.

School officials have examined the current processes, and developed a detailed performance improvement plan to address each process deemed important to achieve increased student learning. Specific information is contained in the Continuous Improvement Plan (CIP).

Progress in Meeting Standards

For the past two years, BCCLC has successfully met Measurable Student Educational Standards 1, 4, 5, and 6 3. The school has not met Standard #2, "~~90% of students in grades K-3 will demonstrate reading competency by scoring proficient on the end of year (Spring) Idaho Reading Indicator (IRI), or Standard #3, "85% of third-fifth graders will score proficient or above on the Idaho Standard Achievement Test (ISAT)." In three of the four grade levels, Also, BCCLC has not achieved AYP for the past three two years. in reading. A careful analysis of disaggregated test data indicates that a very small number of students with extreme learning disabilities account for these results. Appendix G contains school-wide test results for the past several years.~~ met Idaho IRI Targets for the past two years.

February 9, 2012

APPENDIX H

**BCCLC PROJECTED ENROLLMENT GROWTH
2011-2012 THROUGH 2019-2020**

BCCLC projected enrollment								
	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19
grade	enrolled							
K	66	66	86	86	86	86	86	86
1	45	66	66	86	86	86	86	86
2	40	45	66	66	86	86	86	86
3	23	40	45	66	66	86	86	86
4	28	23	40	45	66	66	86	86
5	20	28	23	40	45	66	66	86
Total:	222	268	326	389	435	476	496	516
*Two new teachers/classrooms will be added each year.								

February 9, 2012

BCCLC enrollment and budget projections Based on rejection of new Enrollment Cap Amendment

1/31/2012

	Year 1 (FY 12)			Year 2 (FY 13)			Year 3 (FY 14)			NOTES: School notes in plain text. PCSC Staff notes in italics.
	Number	Rate	Amount	Number	Rate	Amount	Number	Rate	Amount	
Number of Students K	64		\$0.00	50		\$0.00	50		\$0.00	
Number of Students 1-3	101		\$0.00	129		\$0.00	129		\$0.00	
Number of Students 4-6	42		\$0.00	59		\$0.00	59		\$0.00	
Number of Students 7-12			\$0.00			\$0.00			\$0.00	
Exceptional	13			16			16			
Total Number of Students / units	220	9.9		254	10.6		254	10.6		number of support units as calculated by state formula
Revenues:										
State Apportionment			\$542,819			\$583,364			\$583,364	actual number calculated from current formula
State Transportation		80%	33,200		80%	37,200		80%	37,200	estimate based on current state allocation
Nutrition Program			0			0			0	
Federal Grants			66,761			68,448			68,448	estimated as a product of actual current allocations
Contributions/Donations			2,000			2,500			2,500	estimated as a projection of actual current revenue
State Revenue (IRI/LEP/Except/Voc)			10,894			11,450			11,450	estimated as a projection of current revenue
Entitlement			196,260			208,036			208,036	based on current funding of \$19,626 per unit
Insert Revenue Lines Here										
Total Revenues			\$851,934			\$910,998			\$910,998	
Expenses:										
<u>Salaries:</u>										
Teachers			\$289,962			\$341,462			\$341,462	
Special Ed			31,500			32,000			32,000	
Instructional Aides			46,300			50,230			50,230	
Classified/Office Staff			12,210			12,500			13,000	
Administration			63,650			63,650			63,650	
Nutritional Program			0			0			0	
Librarian			0			0			0	
Maintenance/Other			37,500			38,000			38,000	
Insert Salaries Lines Here										
Total Salaries			\$481,122			\$537,842			\$538,342	
<u>Benefits:</u>										
Retirement/PERSI			\$57,500			\$65,760			\$74,065	
Health/Life Insurance			67,500			77,200			86,945	
Payroll Taxes			0			0			0	
Workers Compensation			0			0			0	
Insert Benefits Lines Here										
Total Benefits			\$125,000			\$134,640			\$134,640	
<u>Operating Expenses:</u>										
Textbooks			\$24,000			\$25,000			\$27,000	
Supplies			\$6,800			\$7,000			\$7,100	
Equipment			\$0			\$6,400			\$6,400	
Contract Services			\$4,000			\$4,200			\$4,200	
Legal			\$0			\$0			\$0	
Accounting			\$4,200			\$4,300			\$4,400	
Advertising/Marketing			\$230			\$240			\$240	
Gas/Electric			\$15,300			\$16,500			\$16,500	
Telephone			\$2,100			\$2,200			\$2,200	
Liability & Property Insurance			\$7,500			\$7,500			\$7,500	
Testing & Assessment			\$500			\$550			\$600	
Staff Development			\$6,000			\$5,000			\$5,000	
Consulting			\$0			\$0			\$0	
Travel			\$2,200			\$3,200			\$3,500	
Postage			\$250			\$320			\$320	
Rents and Leases			\$0			\$0			\$0	
Debt Retirement			\$73,586			\$73,586			\$73,586	
Grounds & Maintenance			\$3,000			\$3,200			\$3,200	
Miscellaneous			\$8,200			\$8,200			\$8,200	
Insert OE Lines Here										
Total Operating Expenses			\$157,866			\$167,396			\$169,946	
<u>Program Expenses:</u>										
Transportation			\$0			\$0			\$0	All transportation expenses are included above
Nutrition Program			0			0			0	
Title I			4,000			4,100			4,200	paraeducator salaries listed above
Title VI-B			11,500			11,500			11,600	teacher & paraeducator salaries expenses listed above
Insert Program Expenses Lines Here										
Total Benefits			\$15,500			\$15,600			\$15,800	
Total Expenses			\$779,488			\$855,478			\$858,728	
Net Operating Income/(Loss)										
Beginning Fund Balance			-\$24,281			48,165			103,685	
Ending Fund Balance			\$48,165			\$103,685			\$155,955	

February 9, 2012

BCCLC enrollment and budget projections Based on approval of Enrollment Cap Amendment

1/31/2012

	Year 1 (FY 12)			Year 2 (FY 13)			Year 3 (FY 14)			NOTES: School notes in plain text. PCSC Staff notes in italics.
	Number	Rate	Amount	Number	Rate	Amount	Number	Rate	Amount	
Number of Students K	64		\$0.00	66		\$0.00	86		\$0.00	
Number of Students 1-3	111		\$0.00	141		\$0.00	177		\$0.00	
Number of Students 4-6	45		\$0.00	61		\$0.00	63		\$0.00	
Number of Students 7-12			\$0.00			\$0.00			\$0.00	
Exceptional	13			16			20			
Total Number of Students / units	220	9.9		268	11.8		326	14.2		number of support units as calculated by state formula
Revenues:										
State Apportionment			\$542,819			\$646,012			\$758,637	actual number calculated from current formula
State Transportation		80%	33,200		80%	47,200		80%	52,100	estimate based on current state allocation
Nutrition Program			0			0			0	
Federal Grants			66,761			81,448			98,806	estimated as a product of actual current allocations
Contributions/Donations			2,000			2,500			2,500	estimated as a projection of actual current revenue
State Revenue (IRI/LEP/Except/Voc)			10,894			12,450			15,540	estimated as a projection of current revenue
Entitlement			196,260			231,587			278,689	based on current funding of \$19,626 per unit
Insert Revenue Lines Here										
Total Revenues			\$851,934			\$1,021,197			\$1,206,272	
Expenses:										
<u>Salaries:</u>										
Teachers			\$289,962			\$353,962			\$417,844	
Special Ed			31,500			32,000			32,000	
Instructional Aides			46,300			50,230			55,600	
Classified/Office Staff			12,210			12,500			13,000	
Administration			63,650			63,650			63,650	
Nutritional Program			0			0			0	
Librarian			0			0			0	
Maintenance/Other			37,500			38,000			38,000	
Insert Salaries Lines Here										
Total Salaries			\$481,122			\$550,342			\$620,094	
<u>Benefits:</u>										
Retirement/PERSI			\$57,500			\$65,760			\$74,065	
Health/Life Insurance			67,500			77,200			86,945	
Payroll Taxes			0			0			0	
Workers Compensation			0			0			0	
Insert Benefits Lines Here										
Total Benefits			\$125,000			\$142,960			\$161,010	
<u>Operating Expenses:</u>										
Textbooks			\$24,000			\$36,000			\$27,000	
Supplies			\$6,800			\$7,000			\$7,100	
Equipment			\$0			\$6,400			\$6,400	
Contract Services			\$4,000			\$4,200			\$4,200	
Legal			\$0			\$0			\$0	
Accounting			\$4,200			\$4,300			\$4,400	
Advertising/Marketing			\$230			\$240			\$240	
Gas/Electric			\$15,300			\$16,500			\$16,500	
Telephone			\$2,100			\$2,200			\$2,200	
Liability & Property Insurance			\$7,500			\$7,500			\$7,500	
Testing & Assessment			\$500			\$550			\$600	
Staff Development			\$6,000			\$5,000			\$5,000	
Consulting			\$0			\$0			\$0	
Travel			\$2,200			\$3,200			\$3,500	
Postage			\$250			\$320			\$320	
Rents and Leases			\$0			\$0			\$0	
Debt Retirement			\$73,586			\$73,586			\$314,000	FY14 increase due to anticipated cost for new building or classrooms
Grounds & Maintenance			\$3,000			\$3,200			\$3,200	
Miscellaneous			\$8,200			\$8,200			\$8,200	
Insert OE Lines Here										
Total Operating Expenses			\$157,866			\$178,396			\$410,360	
<u>Program Expenses:</u>										
Transportation			\$0			\$0			\$0	All transportation expenses are included above
Nutrition Program			0			0			0	
Title I			4,000			4,100			4,200	paraeducator salaries listed above
Title VI-B			11,500			11,500			11,600	teacher & paraeducator salaries expenses listed above
Insert Program Expenses Lines Here										
Total Benefits			\$15,500			\$15,600			\$15,800	
Total Expenses			\$779,488			\$887,298			\$1,207,264	
Net Operating Income/(Loss)										
Beginning Fund Balance			-\$24,281			48,165			182,064	
Ending Fund Balance			\$48,165			\$182,064			\$181,072	

SUBJECT

Heritage Community Charter School Annual Update and Proposed Charter Amendment

APPLICABLE STATUTE, RULE, OR POLICY

I.C. 33-5209(1)
IDAPA 08.02.04.203
IDAPA 08.02.04.302

BACKGROUND

Heritage Community Charter School (HCCS) is a public charter school authorized by the Public Charter School Commission (PCSC). Located in Caldwell, HCCS opened in Fall 2011 and serves students in grades K-12 using a bi-lingual (English/Spanish), classical education model.

Upon approval of the charter, the PCSC and HCCS agreed that the school's high school program was to be operated as a 1-year pilot, after which an evaluation of the high school would be presented by the school for the PCSC's consideration.

DISCUSSION

HCCS will provide an annual update regarding the status of the school. PCSC staff has visited the school, met with the board, reviewed the submitted materials, and conversed with a variety of HCCS stakeholders. PCSC staff's observations have resulted in identification of two, primary areas of concern:

1. The HCCS board of directors has been the subject of extensive turmoil at the school.
 - All but one of the original board members have been replaced since June 2011.
 - It is unclear whether the school's bylaws were adhered to with regard to the appointment of new board members. Furthermore, the board has experienced confusion regarding the validity of various versions of its bylaws, some of which contained changes that were not approved by the PCSC. PCSC staff has provided the board with the most recently approved version of the bylaws. This confusion is representative of HCCS's apparent disorganization and consistent inability to produce documents in a timely fashion.
 - Stakeholder trust in the board is extremely low, and the relationship between the board and administration has become toxic. "Founder's Syndrome," the destructive unwillingness of

founders to release control of the school's operations to its board and staff, and inadequate board training appear to be important factors leading to this state of affairs.

- Both former and current board members appear to lack understanding of the board's governance role. Board meetings have tended to focus on daily operations to the exclusion of fiscal oversight.
 - Questions have been raised regarding the board's compliance with open meeting law. Additionally, board meeting minutes have not been approved and posted within a reasonable period. In some cases, it appears that minutes may not have been taken at all, or were lost due to extensive board member turnover.
 - Public information requests have not been filled in accordance with Idaho statute. PCSC staff issued a notice of defect (NOD) to the school on these grounds in December 2011; that NOD was followed by a second on the grounds of failure to provide required reports because the school did not respond with the required corrective action plan (CAP) despite several reminders and offers of assistance.
 - In January 2012, the former HCCS board chairman stepped down to the vice-chairmanship in the face of stakeholder concerns. He and the new chairman report that they have hired an attorney to attend board meetings, take minutes, and ensure compliance with open meeting law. They also report that the HCCS board will receive training and improve communication with stakeholders via conversations with multiple parties and live streaming of board meetings.
2. Both the school administration and board appear to have limited understanding of the school's tenuous financial situation.
- HCCS board meeting materials and minutes indicate that the board has reviewed very limited fiscal information on a regular basis. It is unclear whether the board and administration understand the board's role in fiscal oversight of the school.
 - With a current enrollment of 518 students, HCCS is near its Year One enrollment projection. The school has a waiting list of 217 students; a by-grade breakdown of this list has not been provided in response to PCSC staff requests. As is typical of first-year charter schools, enrollment is low in grades 9-12.

HCCS's ability to remain fiscally viable depends on substantial increases in secondary enrollment over the next five years, a plan that assumes unusually low student attrition rates.

- HCCS's facility lease payment will increase by about \$94,000 in year two, and will continue to increase at a slower rate every year thereafter. The school's plan was to purchase the building within several years; however, the budget does not permit the accumulation of a reserve adequate to cover a down payment or otherwise secure a loan.
- The existing facility is inadequate to house the number of students required to retain fiscal solvency. HCCS's five-year budget projections account for the addition of portable buildings, but do not appear to allocate adequate funds for setup of the units.
- Additionally, the five-year budget projections are based on a significant decrease in special education and classified/office staff salaries compared to Year One, despite increased enrollment, and may not include sufficient allocations for technology requirements. Thus, the reality of the five-year outlook may not be as optimistic as the budgets portray.
- Due to the high facility lease and unanticipated costs resulting in an unfavorable Year One fiscal outlook, the HCCS board elected in January 2012 to eliminate two of its three administrative positions, removing the business manager and marketing specialist.
- HCCS anticipates that the school will incur a net loss in Year One; however, carryover from the pre-opening year should permit a positive, year-end fund balance.

In addition to the concerns cited above, PCSC staff makes the following observations:

1. An unusually high number of student disciplinary issues have arisen at HCCS. By the end of November 2011, 33 suspensions had been issued (40% were due to fighting/bullying, 10% to disrespect or class disruption, and 50% to skipping assigned detentions). Additionally, the school assigned 52 detentions during the first 4 months of school. 30 students have withdrawn since the beginning of the year; primary reasons for withdrawal include disciplinary issues (40%) and excessive absences (30%). Site visit observations and parent interviews confirm the existence of classroom management problems in most grades.

2. In November 2011, HCCS reported that 65% of kindergarten students, 85% of 1st grade students, and 65% of 2nd and 3rd grade students were reading at grade level according to the IRI. Additionally, curricular assessments revealed 65% of 4th and 5th grade students and 80% of 6th through 12th grade students were reading at grade level. These results are not necessarily reflective of HCCS' program as all students were new to the school this fall.
3. HCCS's administrative staff originally consisted of three individuals: a principal, a business manager, and a marketing specialist. The latter two positions were eliminated by the board in January 2012. The principal is on extended medical leave; that position is being filled in the interim by the school's special education director and a former public school superintendent working on a part-time, consultant basis. The business manager's responsibilities will be filled by an outside CPA firm, and a committee of volunteers is reportedly taking on marketing efforts. It appears that disruption of the administrative team has led to numerous problems, including delayed offering of enrollment to students on the waiting list for grades in which vacancies have occurred.
4. HCCS has reported to PCSC staff that the school failed to properly notify the public of enrollment opportunities for Fall 2013. The school established an enrollment deadline of April 1, but did not begin dissemination of enrollment opportunity information three months in advance of that date. According to administrative rule, enrollment deadlines cannot be changed, but enrollment information must be disseminated three months in advance. This places the school in the position of violating one provision or the other. PCSC staff has advised the school to discuss the situation with their attorney and decide upon the most appropriate course of action.

HCCS is proposing a charter amendment that would update the bylaws to eliminate the requirement that, after Year One, two board members be stakeholder elected. This would result in an entirely self-appointed board. Despite PCSC staff requests, HCCS has not provided information with regard to stakeholder input on the proposed amendment.

IMPACT

If the PCSC approves the proposed charter amendment, the school will begin operating under the new bylaws. If the PCSC denies the proposed charter amendment, the school could appeal this decision to the State Board of Education, or could decide not to proceed any further.

STAFF COMMENTS AND RECOMMENDATIONS

Due to continued distrust among stakeholders with regard to the transparency and reliability of the HCCS board, staff recommends that the PCSC deny the proposed charter amendment allowing all board members to be appointed by the board of directors.

Staff further recommends that the PCSC require HCCS to provide quarterly fiscal and enrollment updates.

Additionally, staff notes that although HCCS board members and administration have contacted the PCSC office with relatively frequent updates, the school's board has been consistently slow, and in some cases apparently reluctant, to provide documentation requested by the PCSC office. Several stakeholders have reported similar experiences.

COMMISSION ACTION

A motion to deny Heritage Community Charter School's proposed charter amendment allowing all board members and officers to be appointed by the board of directors.

OR

A motion to approve Heritage Community Charter School's proposed charter amendment allowing all board members and officers to be appointed by the board of directors.

Moved by _____ Seconded by _____ Carried Yes _____ No _____

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CHARTER SCHOOL DASHBOARD

Date: January 10, 2012

School Name: Heritage Community Charter School

School Address: 1803 E Ustick Caldwell, Idaho 83605

School Phone: 453-8070

Current School Year: 2011-12

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	Board Chairman; Term Feb 2010-May 2012	Attorney	rhammond@heritagecommunitycharter.com	283-0888
Lon McRae	Vice Chairmand; Term Feb 2010-May 2012	Dentist	lmcrae@heritagecommunitycharter.com	870-5500
Tamara Strickwerda	Secretary; Term Dec 2012 - ?	Parent	greg1tam@peoplepc.com	
Trey Klauss	Term Feb 2010 - May 2013	Insurance	tklauss@heritagecommunitycharter.com	891-4140
Matthew Hollist	Feb 2010 - May 2013	Health Care Education	mhollist@heritagecommunitycharter.com	899-0095
Josh Gregory	Jan 2011 - May 2014	Law Enforcement	jgregory@heritagecommunitycharter.com	801-391-6739
Robb MacDonald	December 2011 - ?	City Planning	rmacdonald@heritagecommunitycharter.com	

ENROLLMENT

Grade Level	Current Enrollment	Current ADA	Current Waiting List	Previous Year's Enrollment	Previous Year's ADA
K	60			NA	NA
1	60			NA	NA
2	60			NA	NA
3	60			NA	NA
4	60			NA	NA
5	60			NA	NA

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6	58			NA	NA
7	30			NA	NA
8	30			NA	NA
9	9			NA	NA
10	17			NA	NA
11	13			NA	NA
12	1			NA	NA
TOTAL	518	92%	277	NA	NA

Student Attrition Rate: As if Dec 6, 2011, we had 30 students withdraw between the beginning of the school year and December.

Is your school planning to increase or decrease enrollment opportunities for the upcoming school year? Yes

If yes, briefly describe planned enrollment changes, including numbers and grades affected: 7th grade will increase to 60 as 6th grade students move up a grade.

STUDENT DEMOGRAPHICS

School Year	Hispanic (# and %)	Asian (# and %)	White (# and %)	Black (# and %)	American Indian (# and %)	LEP (# and %)	FRL (# and %)	Special Education (# and %)
Current	152 29%	8 1.5%	343 66%	7 1.5%	10 2%	28; 6%	389; 75%	28 6%
Previous	NA	NA	NA	NA	NA	NA	NA	NA

FACULTY AND STAFF

Administrator Name(s): Christine Ivie (Superintendent and Principal); Jean Taylor (Federal Programs and Special Education)

Administrator's Hire Date: March 2011; April 2011

Administrator Email(s): civie@heritagecommunitycharterschool.com; jtaylor@heritagecommunitycharter.com

Current Classified Staff (# FTE): 16 part time and 2 full time (10 FTE)

Classified Attrition Rate: 2

Current Faculty (# FTE): 24

Faculty Attrition Rate: 0

EDUCATIONAL PROGRAM

Did your school make AYP during the last school year? NA

If no, please specify indicator and status: NA

If no, please describe plan for addressing need: NA

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

REPORTING

Date of last programmatic operations audit? Dec 12-13, 2011

Date submitted to authorizer? submitting draft report as soon as we receive it from the ICSN

Who performed your most recent programmatic audit? ICSN

Date of most recent fiscal audit? December 2011

Date submitted to authorizer? Will submit as soon as we receive report

COMMENTS

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

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Board member turnover (all board members have changed except one); Finance/Business Manager position eliminated by the Board in January 2012; Community Relations/Marketing/Technology and Student Data Manager eliminated by the Board in January 2012

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

Please see attached superintendent report for more detail. The biggest successes we have had at HCCS have been in creating an outstanding team of faculty members and administrators; creating classrooms that carry out the dual language immersion model and classical model with excellent instruction, and attracting a student body with diverse demographic characteristics.

Please describe any challenges you anticipate during the upcoming year:

Board turnover, lack of board training and difficulty with board members understanding the Board's role; Elimination of 2 critical positions by the Board with no notice to administration or faculty

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

School currently has a notice of defect and several complaints associated with board activity. Attached budget templates reflect the budget as of December 2011, however, the Board made several decisions that impact the budget during December 2011 and January 2012.

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
- Exit interview data for most recent school year

Heritage Community Charter School, January 2012	Proposed (Board Approved Budget for Fiscal Year)	Actual (Through Most Recent Month End)	Projected (Anticipated Year-End Numbers)	Percentage Used (Actual / Proposed)	Notes
REVENUE					
Salary Apportionment	\$1,186,106.00	\$884,946.50	\$1,188,937.70	74.61%	adopted 25.5 Support units, 512 students (openings in 6 (5) and in secondary (3)) 92% attendance
Benefit Apportionment	\$228,520.00	\$170,000.00	\$228,520.00	74.39%	
Entitlement	\$500,463.00	\$372,500.00	\$500,463.00	74.43%	** no break out given from state until last couple of payments
State Transportation	\$146,775.00	\$110,000.00	\$172,800.00	74.94%	Based on 72% reimbursement on actual costs as we are looking to be slightly over the cap per student to receive full funding
Lottery	\$0.00			#DIV/0!	
Other State Funds (Specify)	\$0.00			#DIV/0!	
Special Ed - Regular	\$70,000.00		\$45,000.00	0.00%	Based on last estimate, but based on our child count we anticipate an adjusted allocation
Special Ed - ARRA	\$0.00			#DIV/0!	
Title I	\$130,000.00		\$110,000.00	0.00%	Funds requested for December 2011 , anticipate carrying over portion of \$141,382 allocation to next fiscal yea
Federal Title I Funds : ARRA	\$0.00			#DIV/0!	
Medicaid Reimbursement	\$15,000.00		\$15,000.00	0.00%	Getting set up with Idaho medical billing to beging claims
Title IIA	\$0.00		\$20,000.00	#DIV/0!	Anticipated carry over or remaining allocation - Total allocation \$22,166
Local Revenue (Specify)	\$125,000.00		\$0.00	0.00%	Albertsons Grant money deferred from FY 2011 (recognized as revenue FY 11, used as current resources in FY 12) Included in the beginning of year carryover
Federal Startup Grant	\$0.00	\$53,126.98	\$53,126.98	#DIV/0!	Start up purchases for amendment and items purchased in July.
Other Grants (Specify)	\$0.00			#DIV/0!	
Fundraising	\$10,000.00	\$16,280.22	\$16,500.00	162.80%	
Interest Earned	\$0.00	\$54.51	\$75.00	#DIV/0!	
Other (Specify)	\$0.00	\$81,145.52	\$180,000.00	#DIV/0!	Food Service Revenue (\$12,016.54 due for December 2011 service)
Other (Specify)	\$0.00			#DIV/0!	
TOTAL REVENUE	\$2,411,864.00	\$1,688,053.73	\$2,530,422.68	69.99%	
EXPENDITURES					
100 Salaries					
Teachers	\$809,880.00	\$270,006.09	\$794,000.00	33.34%	
Special Education	\$117,990.00	\$50,453.49	\$117,990.00	42.76%	
Instructional Aides	\$82,422.00	24061 1/2	\$81,900.00	29.19%	
Classified/Office	\$150,498.00	\$73,333.16	\$135,498.00	48.73%	
Administration	\$95,004.00	\$47,500.00	\$95,004.00	50.00%	
Maintenance	\$10,944.00	\$2,488.50	\$3,000.00	22.74%	moved to contracted month to month janitorial
Other (Specify)				#DIV/0!	
Other (Specify)				#DIV/0!	
Total Salaries	\$1,266,738.00	\$467,842.74	\$1,227,392.00	36.93%	
200 Employee Benefits					
PERSI/FICA/Benefits	\$333,449.00	\$87,279.74	\$300,000.00	26.17%	Many staff opt'd out of medical coverage - we do not offer cash in lue of coverage
Other (Specify)				#DIV/0!	
Total Benefits	\$333,449.00	\$87,279.74	\$300,000.00	26.17%	
300 Purchased Services					
Management Services		\$2,738.70	\$7,944.00	#DIV/0!	Janitorial Services
Staff Dev/Title IIA				#DIV/0!	
Legal Pub/Advertising				#DIV/0!	
Legal Services	\$10,000.00	\$2,612.43	\$10,000.00	26.12%	
Special Education	\$20,000.00	\$8,295.03	\$20,000.00	41.48%	
Liability & Property Ins	\$24,000.00	\$12,082.00	\$23,500.00	50.34%	
Substitute Teachers	\$7,500.00	\$1,290.00	\$7,000.00	17.20%	
Board Expenses				#DIV/0!	
Computer Services				#DIV/0!	
Transportation	\$195,700.00	\$81,568.40	\$240,000.00	41.68%	Based on bus ridership, routes estimated after monthly evaluation with Brown Bus. Should be close to cap amounts. - Does not include Dec 2011 Invoice
Travel				#DIV/0!	
Other (Specify)	\$8,250.00	\$14,341.25	\$15,500.00	173.83%	Copy Machine lease and service agreement (\$7,500) IDLA classes (\$750) - More IDLA classes than anticipated to meet needs.
Other (Specify)	\$12,500.00	\$2,973.38	\$16,475.00	23.79%	Audit fees - programmatic and fiscal (\$7,500) Professional organization fees (\$5,000), bookkeeping service:
Total Services	\$277,950.00	\$125,901.19	\$340,419.00	45.30%	
Facilities				#DIV/0!	

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Building Lease	\$388,216.00	\$244,200.07	\$399,486.00	0.67%	Partial Month August 2011 Rent, paid lease through February 2012
Land Lease				#DIV/0!	
Modular Lease				#DIV/0!	
Utilities, Phones, Lndscp	\$41,000.00	\$16,432.01	\$50,000.00	3.15%	Have yet to receive all bills relating to December time frames.
Site Preparation				#DIV/0!	
Other (Specify)	\$2,500.00			0.00%	Any permits or city/ county fees applicable - none anticipated
Other (Specify)	\$9,000.00	\$186.53	\$8,620.00	906.32%	Grounds & Maintenance, lawn care, snow removal
Total Facilities	\$440,716.00	\$260,818.61	\$458,106.00	59.18%	
400 Supplies and Maintenance					
Textbooks		\$4,803.85	\$5,000.00	#DIV/0!	
School Supplies	\$2,500.00	\$61,733.94	\$64,000.00	2469.36%	Testing and assessment, start up grant purchases (\$53,126.98).
Power School				#DIV/0!	
Custodial Supplies	\$8,000.00	\$5,412.63	\$9,500.00	67.66%	
Other (Specify)				#DIV/0!	
Other (Specify)				#DIV/0!	
Total Supplies	\$10,500.00	\$71,950.42	\$78,500.00	685.24%	
500 Capital Objects					
Furniture		\$12,155.21	\$12,155.21	#DIV/0!	
Technical AV Equipment				#DIV/0!	
Other (Specify)	\$10,000.00	\$88,938.11	\$180,000.00	889.38%	School Nutrition Start up expenses
Other (Specify)				#DIV/0!	
Other (Specify)				#DIV/0!	
Other (Specify)				#DIV/0!	
Total Capital Objects	\$10,000.00	\$101,093.32	\$192,155.21	1010.93%	
Debt Service					
Specify				#DIV/0!	
Specify				#DIV/0!	
Specify				#DIV/0!	
Total Debt Service	\$0.00	\$0.00	\$0.00	#DIV/0!	
Grant Purchases					
Specify				#DIV/0!	
Specify				#DIV/0!	
Specify				#DIV/0!	
Specify				#DIV/0!	
Specify				#DIV/0!	
Total Grant Purchases	\$0.00	\$0.00	\$0.00	#DIV/0!	
Reserve Fund				#DIV/0!	
Building Fund				#DIV/0!	
Total Expenses	\$2,339,353.00	\$1,114,886.02	\$2,596,572.21	47.66%	
Carryover from Previous FY	\$0.00	\$208,152.00	\$208,152.00	#DIV/0!	
Reserve/(Deficit)	\$72,511.00	\$781,319.71	\$142,002.47	1077.52%	

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Heritage Community Charter, January 2012	Proposed Budget	Notes
REVENUE		
Local Revenue		
State Revenue		
Entitlement	\$561,304.00	Estimated enrollment of 558 generating 28.6 support units
Wages		
Administration	\$140,048.00	
Teachers	\$1,031,596.00	
Classified	\$138,694.00	
Medicaid	\$15,000.00	
Benefit	\$229,811.00	
Transportation	\$180,000.00	Reimbursement at 75%
Federal Revenue		
Title I	\$140,000.00	
Special Ed	\$40,000.00	
Title II	\$20,000.00	
Startup Grant	\$0.00	
Other Sources (Specify)	\$10,000.00	Fundraising/ Student ID's
Other Sources (Specify)	\$180,000.00	School Nutrition revenue
Other Sources (Specify)		
Total Revenue before holdback	\$2,686,453.00	
PROPOSED HOLDBACK		
		Holdbacks should be estimated at a minimum of 5% - 5.5% for FY 2011.
Teacher Salaries		
Classified Salaries		
Admin Salaries		
Benefits		
Entitlement		
Transportation		
Total Holdback	\$0.00	
Total Revenue after holdback	\$2,686,453.00	
EXPENDITURES		
100 Salaries		
Teachers	\$819,959.00	
Admin	\$95,000.00	
Classified	\$130,697.00	
Special education	\$118,680.00	
Other (Specify)		
Other (Specify)		
Total Salaries	\$1,164,336.00	
200 Benefits		
		Budgeting on 29 expected full time staff accepting insurance, current experience is not all staff will want insurance
Benefit Dollars	\$113,100.00	
PERSI/Payroll taxes	\$225,619.00	
Other (Specify)		
Total Benefits	\$338,719.00	
300 Purchased Services		
Transportation	\$240,000.00	
Special Education	\$22,500.00	
Proctor costs	\$2,000.00	testing and assessment
Legal	\$12,500.00	
Insurance	\$25,000.00	
Copier Lease	\$11,000.00	
Printer Lease		
Facility Lease	\$493,889.00	
Utilities	\$50,000.00	
Professional Development	\$5,000.00	Professional dues and other fees
Technology	\$5,000.00	
Management Services		

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Legal Publications/Advertising	\$1,000.00	
Substitute Teachers	\$5,000.00	
Board Expenses		
Other (Specify)	\$15,000.00	Audit fees, and bookkeeping services
Other (Specify)	\$7,500.00	IDLA courses
Total Purchased Services	\$895,389.00	
Supplies & Materials		
Teacher/Classroom	\$2,500.00	
Office	\$1,750.00	
Janitorial	\$10,000.00	
Textbooks	\$7,500.00	
Other (Specify)	\$22,000.00	grounds and maintenance
Other (Specify)	\$180,000.00	School nutrition expenditures
Total Supplies & Materials	\$223,750.00	
Grant Expenditures		
Specify		
Specify		
Specify		
Total Grant Expenditures	\$0.00	
Capital Outlay		
Total Capital Outlay	\$0.00	
Debt Retirement		
Total Debt Retirement	\$0.00	
Insurance & Judgements		
Total Insurance & Judgements	\$0.00	
Transfers		
Total Transfers	\$0.00	
Contingency Reserve	\$0.00	
Building Fund	\$0.00	
Total Expenditures	\$2,622,194.00	
Carryover from Previous FY	\$142,002.47	Reflects projected reserve/(deficit) from "current year" worksheet
Reserve/(Deficit)	\$206,261.47	

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Name HCCS
City Caldwell, Id

Student numbers	Grades	k	1	2	3	4	5	6	7	8	9	10	11	12
Yr 1	510 K-12	60	60	60	60	60	60	55	30	30	20	12	3	0
Yr 2	558 K-12	60	60	60	60	60	60	60	55	30	18	20	12	3
Yr 3	603 K-12	60	60	60	60	60	60	60	60	55	18	18	20	12
Yr 4	631 K-12	60	60	60	60	60	60	60	60	60	35	18	18	20
Yr 5	650 K-12	60	60	60	60	60	60	60	60	60	37	35	19	19
Yr 6	665 K-12	60	60	60	60	60	60	60	60	60	36	35	35	19

K	1-3	4-6	Secondary	Total
60	180	175	95	510
60	180	180	138	558
60	180	180	183	603
60	180	180	211	631
60	180	180	230	650
60	180	180	245	665

At 92% attendance

Support units	Salary	Benefit	Entitlement	Total estimated state apportionment	
Yr 1	25.3	1,225,332	221,048	496,538	1,942,918
Yr 2	28.6	1,310,338	229,811	561,304	2,101,453
Yr 3	32.0	1,530,957	236,261	628,032	2,395,250
Yr 4	34.1	1,626,753	239,485	669,247	2,535,485
Yr 5	35.6	1,695,179	245,213	698,686	2,639,078
Yr 6	36.1	1,717,987	248,146	708,499	2,674,632

Attrition rate at 9th grade
N/A
40%
40%
36%
38%
40%

FT	PT	Aides	Kitchen
26	2	17	3 part 1 full
28	1	13	3 part 1 full
29	1	13	3 part 1 full
30	0	13	3 part 1 full
31	0	13	3 part 1 full
31	0	13	3 part 1 full

Key points

Accounts for ~40% of 8th graders not continuing to 9th grade with only replacing to maintain partial HS levels
 Budgeted at 92 % attendance which is ~1-4% lower than anticipated, but done for conservatism
 In year 2-5 we do not step up teacher experience, because we do not know if the state will
 Does not include technology money from the state as it is still too hard to estimate
 26 full time and 2 half time in year 1
 Budget for all employees to take insurance, but know that 5-10 will decline coverage, expected savings of approximately \$20,000 - \$40,000
 Budgeted Transportation reimbursement at 73% for conservatism based on unknown state funding forecasts

At 94% attendance

**** did not change because we would add no staff****

Support units	Salary	Benefit	Entitlement	Total estimated state apportionment	Addtl @94	
Yr 1	25.3	1,225,332	221,048	496,538	1,942,918	-
Yr 2	28.9	1,389,544	229,811	567,191	2,186,546	85,094
Yr 3	32.3	1,544,642	236,261	633,920	2,414,823	19,573
Yr 4	34.5	1,645,000	239,485	677,097	2,561,582	26,097
Yr 5	36.0	1,713,426	245,213	706,536	2,665,175	26,097

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**HCCS
Annual Budget Template
Caldwell, Id**

	FY 2012-2013			FY 2013-2014			FY 2014-2015			FY 2015-2016			FY 2016-2017		
	Number	Year 2 Rate	Amount	Number	Year 3 Rate	Amount	Number	Year 4 Rate	Amount	Number	Year 5 Rate	Amount	Number	Year 6 Rate	Amount
Number of Students	558			603			631			650			665		
Revenues:															
State Apportionment		\$ 3,766	\$2,101,453		\$ 3,972	\$2,395,250		\$ 4,018	\$2,535,485		\$ 4,060	\$2,639,078		\$ 4,022	\$2,674,632
State Transportation		75%	180,000		75%	202,500		75%	210,000		75%	213,750		75%	221,250
Nutrition Program	\$ -		180,000	\$ -		180,000	\$ -		180,000	\$ -		180,000	\$ -		180,000
Federal Grants - start up			0			0			0			0			0
Albertsons Grant			0			0			0			0			0
Fundraising/student id's			10,000			10,000			12,500			15,000			15,000
Other federal funds			200,000			200,000			200,000			220,000			220,000
Medicaid			15,000			15,000			15,000			16,500			16,500
Total Revenues			\$2,686,453			\$3,002,750			\$3,152,985			\$3,284,328			\$3,327,382
Holdbacks:															
<u>State Holdback</u>															
Total Holdbacks		0%	\$0		0%	\$0		0%	\$0		0%	\$0		0%	\$0
Total Revenues after Holdbacks			\$2,686,453			\$3,002,750			\$3,152,985			\$3,284,328			\$3,327,382
Expenses:															
<u>Salaries:</u>		0.0%			0.0%			0.0%			1.0%			1.0%	
Teachers			\$819,959			\$851,709			\$867,584			\$908,010			\$917,090
Fed Programs Director			\$68,680			\$69,180			\$69,680			\$69,680			\$69,680
Special Ed			\$50,000			\$50,000			\$50,000			\$50,000			\$50,000
Instructional Aids			\$86,697			\$86,697			\$86,697			\$86,697			\$86,697
Bus/Community Director			\$0			\$0			\$0			\$0			\$0
Classified/Office Staff			\$44,000			\$44,000			\$44,000			\$44,000			\$44,000
Administration			\$95,000			\$95,500			\$96,000			\$96,000			\$96,000
Nutritional Program			\$0			\$0			\$0			\$0			\$0
Librarian			\$0			\$0			\$0			\$0			\$0
Maintenance/Other			\$0			\$0			\$0			\$0			\$0
Bus/Ops Director			\$0			\$0			\$0			\$0			\$0
Total Salaries			\$1,164,336			\$1,197,086			\$1,213,961			\$1,254,387			\$1,263,467
<u>Benefits:</u>															
Retirement/PERSI		11.6%	\$123,272		11.6%	\$127,074		10.4%	\$116,672		11.6%	\$135,569		11.6%	\$136,623
Health/Life Insurance		325	29 113,100		325	30 117,000		350	31 130,200		400	32 153,600		400	32 153,600
Payroll Taxes		7.7%	89,537		7.7%	92,056		7.7%	93,354		7.7%	96,462		7.7%	97,161
Workers Compensation		1.1%	12,810		1.1%	13,170		1.1%	13,350		1.1%	13,800		1.1%	13,900
Total Benefits			\$338,719			\$349,300			\$353,576			\$399,431			\$401,284
<u>Operating Expenses:</u>															
Textbooks	\$ 20.00		\$7,500	\$ 10.00		\$25,000	\$ 10.00		\$25,000	\$ 10.00		\$25,000	\$ 10.00		\$25,000
Copy Machine Lease			\$11,000			\$11,500			\$12,000			\$13,000			\$15,000
Equipment/ Furniture			\$2,500			\$15,000			\$10,000			\$2,500			\$2,500
Technology			\$5,000			\$7,500			\$7,500			\$7,500			\$15,000
Special Ed services			\$22,500			\$25,000			\$30,000			\$30,000			\$32,500
Legal			\$12,500			\$15,000			\$15,000			\$15,000			\$16,000
Accounting/ Audit fee			\$15,000			\$15,000			\$16,000			\$17,000			\$18,000
Advertising/Marketing			\$1,000			\$1,000			\$1,000			\$1,000			\$1,250
Utilities			\$50,000			\$55,000			\$62,000			\$63,000			\$66,000
Liability & Property Insurance			\$25,000			\$26,000			\$27,000			\$28,000			\$28,000
Testing & Assessment			\$2,000			\$2,500			\$2,500			\$2,500			\$2,500
Staff Development			\$0			\$0			\$0			\$0			\$0
Rents and Leases			\$493,889	18%		\$527,525	18%		\$546,458			\$560,120			\$574,123
Portables/secondary fac			\$0	0%		\$27,500	1%		\$47,500			\$40,000			\$40,000
Permits and fees			\$0			\$5,000			\$5,000			\$1,000			\$1,000
Custodial supplies			\$10,000			\$11,500			\$12,000			\$12,000			\$13,000
Supplies - admin/ postage			\$1,000			\$1,250			\$1,250			\$1,250			\$1,500
Supplies - Operations, HR			\$750			\$750			\$750			\$750			\$1,000
Grounds & Maintenance			\$22,000			\$22,000			\$22,000			\$22,000			\$22,500
Professional fees			\$5,000			\$5,000			\$5,000			\$5,000			\$6,000
Substitutes			\$5,000			\$5,500			\$5,500			\$5,500			\$6,000
IDLA		75	7,500		75	7,500		100	8,000		100	8,000		100	8,500
Total Operating Expenses			\$699,139			\$812,025			\$861,458			\$860,120			\$895,373
<u>Program Expenses:</u>															
Transportation	\$ 365		\$240,000	\$ 365		\$270,000	\$ 365		\$280,000	\$ 365		\$285,000	\$ 365		\$295,000
Nutrition Program	\$ -		180,000	\$ -		180,000	\$ -		180,000	\$ -		180,000	\$ -		180,000
Total Program Expenses			\$420,000			\$450,000			\$460,000			\$465,000			\$475,000
Total Expenses			\$2,622,194			\$2,808,411			\$2,888,995			\$2,978,938			\$3,035,124
Net Operating Income/(Loss)			\$64,259			\$194,339			\$263,989			\$305,390			\$292,258
Beginning Fund Balance			142,002			206,261			400,601			664,592			969,983
Ending Fund Balance			206,261			400,601			664,592			969,983			1,262,242
Ending Fund Balance (No HB occurring)			206,261			400,600			664,590			969,980			1,262,238

Staff note
Portable note

add 1 teacher

add 1 teacher
1 unit - 2 classrooms

2 units - 4 classrooms

add 1 teacher
2 units - 4 classrooms

2 units - 4 classrooms

February 9, 2012



IDAHO PUBLIC CHARTER SCHOOL COMMISSION

650 W. State Street • P.O. Box 83720 • Boise, ID 83720-0037
208/334-2270 • FAX: 208/334-2632
e-mail: charter@osbe.idaho.gov

December 8, 2011

Board of Directors
Heritage Community Charter School
1803 E. Ustick Road
Caldwell, ID 83605

Dear HCCS Board of Directors:

As you are aware, Idaho Code § 33-5209 requires the authorized chartering entity of a public charter school to provide written notice of defect to any school which it has reason to believe has committed a defect. The letter is to serve as written notice of defect to Heritage Community Charter School on the following grounds:

1. Violation of a provision of law, specifically, failure to provide public records requested by Tamara Baysinger, Public Charter School Commission Director, via electronic mail on November 29, 2011.

In accordance with IDAPA 08.02.04.301.03, please submit to the PCSC office by December 22, 2011, a corrective action plan detailing the means by which this defect will be cured. Please don't hesitate to contact me with any questions.

Sincerely,

A handwritten signature in cursive script, appearing to read "T. Baysinger".

Tamara L. Baysinger
Public Charter School Commission Director

Cc: Michelle Clement Taylor, School Choice Specialist, State Department of Education
Christine Ivie, Administrator, Heritage Community Charter School

February 9, 2012



IDAHO PUBLIC CHARTER SCHOOL COMMISSION

650 W. State Street • P.O. Box 83720 • Boise, ID 83720-0037

208/334-2270 • FAX: 208/334-2632

e-mail: charter@osbe.idaho.gov

January 3, 2012

Board of Directors
Heritage Community Charter School
1803 E. Ustick Road
Caldwell, ID 83605

Dear HCCS Board of Directors:

As you are aware, Idaho Code § 33-5209 requires the authorized chartering entity of a public charter school to provide written notice of defect to any school which it has reason to believe has committed a defect. The letter is to serve as written notice of defect to Heritage Community Charter School on the following grounds:

1. Failure to submit required reports to the authorized chartering entity governing the charter, specifically, failure to submit a corrective action plan as required by the notice of defect issued to HCCS on December 8, 2011.

In accordance with IDAPA 08.02.04.301.03, please submit to the PCSC office by January 17, 2012, a corrective action plan detailing the means by which this defect will be cured. Please don't hesitate to contact me with any questions.

Sincerely,

A handwritten signature in cursive script, appearing to read "T. Baysinger".

Tamara L. Baysinger
Public Charter School Commission Director

Cc: Alan Reed, Chairman, PCSC
Michelle Clement Taylor, School Choice Specialist, SDE
Christine Ivie, Administrator, HCCS

Enclosures (2)

February 9, 2012

Tamara Baysinger

From: Tamara Baysinger
Sent: Friday, December 23, 2011 2:18 PM
To: 'Lon McRae'
Cc: 'hammonerichard@hammondlawoffice.com'; 'tklauss@heritagecommunitycharter.com'; 'hollismatthew@iinwe.org'; 'jgregory@heritagecommunitycharter.com'; 'greg1tam@peoplepc.com'; 'rbbcmacdonald@yahoo.com'; Keelie Campbell
Subject: Outstanding NOD

Thanks, Lon. I did receive the four emails.

Please bear in mind that I still need the requested board meeting materials (see public records request emailed 11/29/11). For clarity, these comprise all documents provided to the board for review/consideration in preparation for, or during, board meetings.

At this time, HCCS remains in defect as identified in the Notice of Defect dated 12/8/11; in accordance with that NOD, your corrective action plan was due on 12/22/11. At this time, we have yet to receive your CAP and will be obliged to issue a second NOD on the grounds of failure to submit required reports if said CAP is not submitted posthaste.

I realize that you are new to the NOD/CAP process and am happy to answer any questions that you have. Details may also be found in I.C. 33-5209(2-3) and IDAPA 08.02.04.301.

Additionally, please note that I.C. 67-2344 requires that meeting minutes be made available within a reasonable time after each board meeting. The HCCS website currently provides minutes only through August 23, 2011. Have the remaining minutes been approved, but not posted? If so, please post them ASAP and/or provide them to this office in accordance with public records law. See I.C. 9-339 for relevant deadlines.

I appreciate your prompt attention to this matter.

Regards,

Tamara L. Baysinger
Director, Idaho Public Charter School Commission
208-332-1583

From: Lon McRae [<mailto:lmcrae@heritagecommunitycharter.com>]
Sent: Thursday, December 22, 2011 9:32 AM
To: Tamara Baysinger
Subject: Fwd: Fw: RE: HCCS Board Member Letters of Resignation

Tamara I am forwarding the letters of recommendation and reasons why thy resigned

Lon McRae

----- Forwarded message -----
From: **Greg & Tamara Strikwerda** <greg1tam@peoplepc.com>
Date: Wed, Dec 21, 2011 at 12:48 PM
Subject: Fw: RE: HCCS Board Member Letters of Resignation
To: LMcRae@heritagecommunitycharter.com

February 9, 2012



IDAHO PUBLIC CHARTER SCHOOL COMMISSION

650 W. State Street • P.O. Box 83720 • Boise, ID 83720-0037
208/334-2270 • FAX: 208/334-2632
e-mail: charter@osbe.idaho.gov

December 8, 2011

Board of Directors
Heritage Community Charter School
1803 E. Ustick Road
Caldwell, ID 83605

Dear HCCS Board of Directors:

As you are aware, Idaho Code § 33-5209 requires the authorized chartering entity of a public charter school to provide written notice of defect to any school which it has reason to believe has committed a defect. The letter is to serve as written notice of defect to Heritage Community Charter School on the following grounds:

1. Violation of a provision of law, specifically, failure to provide public records requested by Tamara Baysinger, Public Charter School Commission Director, via electronic mail on November 29, 2011.

In accordance with IDAPA 08.02.04.301.03, please submit to the PCSC office by December 22, 2011, a corrective action plan detailing the means by which this defect will be cured. Please don't hesitate to contact me with any questions.

Sincerely,

A handwritten signature in cursive script, appearing to read "T. Baysinger".

Tamara L. Baysinger
Public Charter School Commission Director

Cc: Michelle Clement Taylor, School Choice Specialist, State Department of Education
Christine Ivie, Administrator, Heritage Community Charter School

February 9, 2012

Richard L. Hammond
Board Chair
Heritage Community Charter School

Sent Via Fax / Total Pages: 2

January 20, 2012

Keelie Campbell
Idaho State Board of Education
Charter School Program Manager
Phone: 208-332-1585
Fax: 208-334-2632

Re: CORRECTIVE ACTION PLAN

Dear Ms. Campbell:

The letter is submitted as a corrective action plan for Heritage Community Charter School ("HCCS") and is a compilation of the information previously sent via three separate emails to you and Ms. Baysinger over the past several days.

First and foremost, HCCS has hired and retained Chris Yorgason to serve as the board attorney and board to assist in keeping and maintaining all the records of the school. Mr. Yorgason has been representing Idaho charter schools for over seven years and is fully capable of assisting the board in meetings all of its statutory and regulatory requirements. Mr. Yorgason will be in attendance at all board meetings and will work to ensure that the board is complying with all open meeting and public records statutory requirements.

Second, the board has undergone some changes. Lon McRae has stepped down from the board chair position, which has helped alleviate a number of concerns and has improved relations between the board and staff. I have taken on the position of board chair and, as such, I have begun to implement a number of policies: we are working with parents and staff to provide live online streaming of the board meetings to provide more openness and access to board actions; I have joined the parents' group Facebook account to increase communication and improve relationships; I have spent much time with Dr. Ivie, Jean Taylor, Bob Larson, parents and staff to receive and address their concerns and to explain the changes that will be implemented.

The Board has also approved its attendance and participation in the Brian Carpenter training program. As the new Board chair, I have personally read the entire manual, reviewed open meeting law statutes, met privately with legal counsel, read the charter and bylaws and will be holding additional training meetings for the board.

Further, in previous conversations with Ms. Baysinger, she addressed a number of issues which can be grouped into four categories:

1. The board has held meetings at inconvenient times and locations;
2. Issues with the bylaws and the selection of new board members;

February 9, 2012

3. Minutes -- not posted and possible not in existence; and
4. Public records -- not timely provided in accordance with Idaho statutes (including minutes and board packets).

As a result of these issues, the Charter Commission issued two notices of defect. The first for failure to properly comply with a public records request; the second for failure to properly respond to the first notice of defect, including providing a corrective action plan. The Board has communicated with Mr. Yorgason regarding these issues and these issues have been corrected and will be avoided in the future.

First, it appears the board held a meeting in Meridian, early in the morning. That meeting was an executive session to discuss a personnel item and the meeting held at the time and place that was convenient for staff member who was being discussed. We have spoken to members of the board and board meetings will be held in a location that is convenient for the public to attend or good reason will be shown to explain the alternate location.

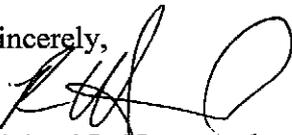
Second, as the new chairman of the board, I have expressed my desire to strictly adhere to the charter, bylaws and other governing documents. With the help of our attorney, we will ensure that all future actions will be undertaken in full compliance with the charter, bylaws, policies and Idaho law.

Third, at a recent special board meeting, the board formally approved minutes for four separate council meetings, which covers all meetings through the November regular board meeting.

Those minutes will be posted online as soon as possible. The minutes for the December and January meetings have not yet been approved, but will be approved and posted shortly. In the future, the board will make sure that minutes are written and approved in a timely manner and they will be made available with a reasonable period of time.

Finally, we believe that we have now fully complied with the public records requests and the notices of defect. This corrective action plan should hopefully put to rest any issues or concerns that the Commission may have with HCCS. If there are further concerns, please let us know.

Sincerely,



Richard L. Hammond
Board Chair

rlh

February 9, 2012



January 12, 2012

Dear Idaho Charter School Commissioners,

The HCCS Board of Directors respectfully submits proposed changes to its bylaws for consideration of approval at the Commission at the February 9th, 2012 Commission meeting.

The HCCS Board of Directors unanimously approved changes to its bylaws on March 12th, 2011 affecting its elected stakeholder positions on the Board of Directors. We apologize that unfortunately due to an oversight, we were not aware that these changes were not submitted to the Commission for review and approval until this time.

After much research and review of other charter schools, the board gave consideration to the changes to its bylaws due to the fact that the directors felt the need for recruitment and selection of individuals to serve on the board with specific skills sets and talents to adequately provide oversight and accountability to its stakeholders and authorizing entity. The Board of Directors felt that the bylaws stating that two positions filled by a stakeholder election could potentially provide some challenges in filling specific skill sets needed by the board in the scope of its duties, and that board appointed positions would provide a better opportunity to appoint directors who could provide those specific skill sets needed. In addition, but secondary to the first point, is the avoidance of directors being elected by stakeholders to promote a specific group's personal agenda within the school, which eventually undermines the work of the board as a whole.

We feel that this decision to remove stakeholder elected seats will not in any way diminish the "voice" of the stakeholders as we are providing opportunities for all stakeholders to serve on specific committees. These committees will be under the direction of a designated board member and the principal and we feel will provide parents' opinions to be voiced, in addition to oversight, accountability and support to school operations. These committees will then in turn make recommendations to the principal for his or her recommendation to the board of directors. We feel this decision has proven to be effective in other local charter schools and that of our mentor schools.

Respectfully,
Lon C. McRae, Director
The HCCS Board of Directors

February 9, 2012

BYLAWS OF HERITAGE COMMUNITY CHARTER SCHOOL
An Idaho Nonprofit Corporation

Article 1: Offices

The corporation's principal office shall be fixed and located within the Caldwell School District # 132 boundaries, County or Canyon, State of Idaho. The Board is granted full power and authority to change the principal office from one location to another within the Caldwell School District # 132 boundaries, County of Canyon, State of Idaho.

Article 2: Purpose

The specific and general purposes of the corporation are described in the Articles of Incorporation

Article 3: No Members

The corporation shall have no members. Any action, which would otherwise by law require approval by a majority of all members or approval by the members, shall require only approval of the Board. All rights which would otherwise by law vest in the members shall vest in the Board.

Article 4: Directors

Section 4.1 General Powers

Subject to the limitations of the Idaho Nonprofit Corporation Act, the corporation's Articles of Incorporation and these Bylaws, the activities and affairs of the corporation shall be conducted and all corporate powers shall be exercised by or under the direction of the Board. The Board may delegate the management of the corporation's activities to any person(s), management company or committees, however composed, provided that the activities and affairs of the corporation shall be managed and all corporate powers shall be exercised under the ultimate direction of the Board. No assignment, referral or delegation of authority by the Board or anyone acting under such delegation shall preclude the Board from exercising full authority over the conduct of the corporation's activities, and the Board may, subject to contractual obligations as may exist, rescind any such assignment, referral or delegation at any time.

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Section 4.2 Specific Powers

Without prejudice to its general powers, but subject to the same limitations set forth above, the Board shall have the following powers in addition to any other powers enumerated in these Bylaws and permitted by law:

- a. To select and remove all of the officers, agents and employees of the corporation; to prescribe powers and duties for them which are not inconsistent with law, the corporation's Articles of Incorporation or these Bylaws; and to fix their compensation;
- b. To conduct, manage and control the affairs and activities of the corporation and to make such rules and regulations therefore which are not inconsistent with the law, the corporation's Articles of Incorporation or these Bylaws, as it deems best;
- c. To adopt, make and use a corporate seal and to alter the form of the seal from time to time, as it deems best;
- d. To borrow money and incur indebtedness for the purpose of the corporation, and to cause to be executed and delivered therefore, in the corporate name, promissory notes, bonds, debentures, deeds of trust, mortgages, pledges, hypothecation's and other evidences of debt and securities therefore;
- e. To act as trustee under any trust incidental to the principal object of the corporation, and to receive, hold, administer, exchange and expend funds and property subject to such trust;
- f. To acquire by purchase, exchange, lease, gift, devise, bequest, or otherwise, and to hold, improve, lease, sublease, mortgage, transfer in trust, encumber, convey or otherwise dispose of real and personal property;
- g. To assume any obligations, enter into any contracts or other instruments, and do any and all other things incidental or expedient to the attainment of any corporate purpose; and
- h. To carry out such other duties as are consistent with the tax-exempt purpose for which the corporation is formed.

Section 4.3 Number, ~~Election~~ Appointment and Term of Directors

- a. The authorized number of Directors shall be no less than five (5) and no greater than seven (7) until changed by amendment of these Bylaws. ~~Except as provided in subparagraph 4.3(b) below, t~~The Board shall consist of no less than two members elected by the stakeholders of Heritage Community Charter School, ~~the remaining~~All Heritage Community Charter School Board members shall be elected appointed by the Board of Directors. A "stakeholder" is defined as one or more of the following: (i) parents of students attending the school; (ii) the initial ~~Board members;~~ or (iii) the initial "founders" of Heritage Community

Charter School as designated by the board in accordance with Idaho Code Section 33-5202A(3).

- b. ~~**Initial Board Members.** Prior to and during the initial year of school operation, all Board members shall be elected by the Board of Directors. When electing initial board members, the board shall designate two seats that will become vacant at the end of the initial year, two seats that shall become vacant at the end of the second year, and so on. After the initial year, one of these vacancies shall be filled by a Stakeholder elected board member, and that seat shall be designated as a "Stakeholder Elected Seat." At the end of the second year, one of the two vacancies shall be filled by a second Stakeholder elected board member, and that seat shall be designated as a Stakeholder Elected Seat.~~
- e. ~~**Board Member Elected Appointment.** In order to fill the a vacant seat of a Board member elected seat on the Board, the Board will solicit nominations and letters of application from stakeholders or members of the community. The Board may then elect appoint an approved applicant to fill the vacancy. Board members elected to fill the seats of directors whose terms have expired shall be elected at the annual meeting of the Board of Directors.~~
- d.c. ~~**Stakeholder Elected.** In order to fill the vacant seat of a stakeholder elected seat on the Board, the Board will solicit nominations and letters of application from stakeholders or members of the community. A stakeholder election will then be conducted to elect the board member(s) to fill the vacancy. If the election is for the replacement of a Stakeholder Elected Board member whose term has ended, the voting and election shall be conducted within three weeks of the annual meeting of the Board of Directors. At the annual meeting, the Board shall ratify the election results and make such results effective.~~
- e.d. ~~Upon the expiration of the initial year, tThe duration of the term of each new director shall be three (3) years and shall be staggered so as to promote continuity in the Board.~~

Section 4.4 Resignation and Removal

Any Director may resign effective upon giving written notice to the Board, unless the notice specifies a later effective time. If the resignation is effective at a future time, a successor may be nominated by a Director and voted in by majority vote of the Board. A Board member may be removed with or without cause by the vote of two-thirds (2/3) of the remaining directors.

Section 4.5 Vacancies

- a. A Board vacancy or vacancies shall be deemed to exist if any Director dies, resigns, or is removed, or if the authorized number of Directors is increased.
- b. The Board may declare vacant the office of any Director who has been convicted of a felony.
- c. A vacancy on the Board shall be filled in the same manner of selection as ~~that used to select the Director whose office is vacant, provided that vacancies to be filled by election by previously stated.~~ Directors' seats may be filled by a vote of the majority of the remaining Directors, although less than a quorum. Each Director so elected shall hold office until a successor has been appointed and qualified.

No reduction of the authorized number of Directors shall have the effect of removing any Director prior to the expiration of the Director's term of office.

Section 4.6 Place/Notice of Meetings

Meetings of the Board may be held at the principal office of the corporation or at any other place that has been designated in the notice of the meeting by resolution of the Board. Appropriate notices of the meeting complying with Idaho Open Meeting Law shall be posted for all board meetings, including special and emergency meetings of the board of directors. The public, any board member, or officer of the corporation may request to place any desired item on the agenda of any board meeting by notifying in writing. A description shall be delivered to the then acting secretary, or the secretary's designee, of the corporation. The Chairman of the Board shall have discretion regarding what items shall be included on meeting agendas.

Section 4.7 Annual Meetings

The Board shall hold an annual meeting for the purposes of organization, ~~selection~~ appointment of directors and officers, approval of the annual budget and the transaction of other business.

Section 4.8 Regular Meetings

The Board shall hold regular meetings on such dates and at such times and places as may be from time to time fixed and notified by the Board.

Section 4.9 Special Meetings

- a. Special meetings of the Board for any purpose(s) may be called at any time by the Chairman of the Board or the Secretary.

- b. Special meetings of the Board may be held after each Director has received notice by mail, telecopy, e-mail or telephone.
- c. Oral notice shall be deemed received at the time it is communicated, in person or by telephone or wireless, to the recipient or to a person at the office of the recipient whom the person giving the notice has reason to believe will promptly communicate it to the receiver.

Section 4.10 Quorum and Voting

In order to conduct business, a quorum must be present. Two thirds (2/3) of the authorized Directors shall constitute a quorum. The Board shall attempt to reach a general consensus on all actions before the Board; provided, however, that every act or decision done or made by a majority of the Directors present at a meeting duly held at which a quorum is present is an act of the Board.

Section 4.11 Waiver of Notices

Notice of meeting need not be given to any Director who signs a waiver of notice, a written consent to the holding of the meeting, an approval of the minutes of the meeting, whether before or after the meeting, or who attends the meeting without protesting the lack of notice prior thereto or at its commencement. All such waivers, consents and approvals shall be filed with the corporate records or made a part of the minutes of the meetings.

Section 4.12 Adjournment

A majority of the Directors present, whether or not a quorum is present, may adjourn any Director's meeting to another time and place. If a meeting is adjourned for more than twenty-four (24) hours, notice of such adjournment to another time or place shall be given, prior to the time scheduled for the continuation of the meeting, to the Directors who were not present at the time of the adjournment.

Section 4.13 Rights of Inspection

Every Director has the absolute right to inspect and copy all books, records and documents of every kind and to inspect the physical properties of the corporation provided such inspection is conducted at a reasonable time after reasonable notice, and provided that such right of inspection and copying is subject to the corporation's obligations to maintain the confidentiality of certain books, records and documents under any applicable federal, state or local law.

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Section 4.14 Fees and Compensation

Directors shall not receive compensation for their services; however, the Board may approve the reimbursement of a Director's actual and necessary expenses incurred in the conduct of the corporation's business. The corporation shall carry liability insurance covering the Directors and officers of the corporation as described in the Charter on the conduct of the corporation's business.

Section 4.15 Standard of Care

- a. A Director shall perform all duties of a Director in good faith, in a manner such Director believes to be in the best interests of the corporation and with such care, including the duty to make reasonable inquiries, as an ordinarily prudent person in a like situation would use under similar circumstances.
- b. In performing the duties of a Director, a Director may rely on information, opinions, reports or statements, including financial statements and other financial data, in each case prepared or presented by:
 1. One or more officers or employees of the corporation whom the Director believes to be reliable and competent in the matters presented;
 2. Legal counsel, independent accountants or other persons as to matters that the Director believes to be within such person's professional or expert competence; or
 3. A committee of the Board upon which the Director does not serve as to matters within a designated authority, provided the Director believes that the committee merits confidence and the Director acts in good faith, after reasonable inquiry when the need therefore is indicated by the circumstances, and without knowledge that would cause such reliance to be unwarranted.

Article 5: Officers

Section 5.1 Officers

The officers of the corporation shall be Chairman, Secretary, and Treasurer. The corporation may also have, at the discretion of the Board, one or more Vice Chairmen, one or more Assistant Secretaries, one or more Assistant Treasurers, and such other officers as ~~may be elected or appointed~~. Any number of offices may be held by the same person.

Section 5.2 Election

The officers of the corporation shall be appointed by the Board at the annual meeting of the Board ~~by~~ and shall serve at the pleasure of the Board, and shall hold their respective offices until their resignation, removal or other disqualification from service, or until their respective successors shall be ~~elected~~appointed.

Section 5.3 Subordinate Officers

The Board may elect, ~~and or~~ may empower the Chairman to appoint, such other officers as the business of the corporation may require, each of whom shall hold office for such period, have such authority, and perform such duties as are provided in these Bylaws or as the Board may from time to time determine.

Section 5.4 Removal

Any officer may be removed, either with or without cause, by the Board at any time or by any officer upon whom the Board may confer such power of removal. Any such removal shall be without prejudice to the rights, if any, of an officer.

Section 5.5 Resignation

Any officer may resign at any time by giving written notice to the Board; such resignation may not prejudice the rights, if any, of the corporation under any contract to which the officer is a party. Any such resignation shall take effect at the date of the receipt of such notice or at any later time specified therein, the acceptance of such resignation shall not be necessary to make it effective.

Section 5.6 Vacancies

A vacancy in any office because of death, resignation, removal, disqualification or any other cause shall be filled in the manner prescribed in these Bylaws for regular ~~election or~~ appointment to such office, provided that such vacancies shall be filled as they occur and not on an annual basis.

Section 5.7 Chairman

Subject to such powers, the Chairman is the general manager and chief executive officer of the corporation and has, subject to the control of the Board, general supervision, direction and control of the business and officers of the corporation. The Chairman shall preside at all meetings of the Board. The Chairman has the general management powers and duties usually vested in the office of the Chairman and general manager of a corporation as

well as such other powers and duties as the Board may prescribe from time to time.

Section 5.8 Vice Chairman

In the absence or disability of the Chairman, the Vice Chairmen, if any are appointed shall, in order of their ranks as fixed by the Board or, if not ranked, the Vice Chairman designated by the Board, perform all duties of the Chairman and, when so acting, shall have all the powers of, and subject to all the restrictions upon, the Chairman. The Vice Chairmen shall have such other powers and perform such other duties as the Board may prescribe from time to time.

Section 5.9 Secretary

- a. The Secretary shall keep or cause to be kept, at the principal office or such other place as the Board may order, a book of minutes of all meetings of the Board and its committees, including the following information for all such meetings; the time and place of holding; whether regular or special; if special, how authorized; the notice thereof given; the names of Directors present and absent, and the proceedings thereof. The Secretary shall keep, or cause to be kept, at the principal office in the State of Idaho, the original or a copy of the corporation's Articles of Incorporation and Bylaws, as amended to date, and a register showing the names of all directors and their respective addresses. The Secretary shall keep the seal of the corporation and shall affix the same on such papers and instruments as may be required in the regular course of business, but failure to affix it shall not affect the validity of any instrument.
- b. The Secretary shall give, or cause to be given, notice of all meetings of the Board and any committees thereof required by these Bylaws or by law to be given, and shall distribute the minutes of meetings of the Board to all its members promptly after the meetings; shall keep the seal of the corporation in safe custody; shall see that all reports, statements and other documents required by law are properly kept or filed, except to the extent the same are to be kept or filed by the Treasurer; and shall have such other powers and perform such other duties as may be prescribed from time to time by the Board.
- c. The Secretary or Chairman of the corporation shall keep and maintain, or cause to be kept and maintained, adequate and correct accounts of the properties and business transactions of the corporation, including accounts of its assets, liabilities, receipts and disbursements. The books of account shall at all times be open to inspection by any Director.

Section 5.10 Treasurer

The Treasurer shall deposit, or cause to be deposited, all money and other valuables in the name and to the credit of the corporation with such depositories as may be designated from time to time by the Board. The Treasurer shall disburse the funds of the corporation as may be ordered by the Board, and shall render to the Directors, upon request, an account of all transactions as Treasurer and of the financial condition of the corporation. The Treasurer shall present an operating statement and report, since the last preceding regular Board meeting, to the Board at all regular meetings. The Treasurer shall have such powers and perform such other duties as may be prescribed from time to time by the Board.

Article 6: Committees

Section 6.1 Board Committees

The Board may, by resolution adopted by a majority of the Directors then in office, provided that a quorum is present, create one or more standing or ad hoc committees, each consisting of at least one (1) member of the Board, to serve at the pleasure of the Board.

Article 7: Other Provisions

Section 7.1 Validity of Instrument

Subject to the provisions of applicable law, any note, mortgage, evidence of indebtedness, contract, conveyance or other written instrument and any assignment or endorsement thereof executed or entered into between the corporation and any other person, shall be valid and binding on the corporation when signed by two Officers of the Board, as defined in Section 5.1 above, unless the person has no authority to execute the same. Any such instruments may also be signed by a designated individual properly authorized by the Board.

Section 7.2 Construction and Definitions

Unless the context otherwise requires, the general provisions, rules of construction, and definitions contained in the Idaho Nonprofit Corporation Act shall govern the construction of these Bylaws. Without limiting the generality of the foregoing, words in these Bylaws shall be read as the masculine or feminine gender, and as the singular or plural, as the context requires, and the word "person" includes both the corporation and a natural person. The

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captions and headings in these Bylaws are for convenience of reference only and are not intended to limit or define the scope or effect of any provision.

Section 7.3 Fiscal Year

The fiscal year of the corporation shall be set by the Board.

Section 7.4 Conflict of Interest

Any Director, officer, key employee, or committee member having an interest in a contract or other transaction presented to the Board or a committee thereof for authorization, approval, or ratification shall make a prompt, full and frank disclosure of his or her interest to the Board or committee prior to its acting on such contract or transaction. Such disclosure shall include all relevant and material facts known to such person about the corporation's interest. The expectation of refraining from a conflict of interest goes beyond the legal definition and should give consideration to the potential question of conflict.

| No Director shall be ~~elected~~ or appointed who has a relative employed by the Corporation. A relative for the purpose of these bylaws shall include grandparent, parent, spouse, sibling, or child. This shall also include those associated by blood and by matter of law including in-laws.

Should the relative, as defined above, of any serving Director be hired, that Director must resign at the earliest opportunity.

Section 7.5 Interpretation of Charter

In any instance in which the provisions of these Bylaws are in conflict with the provisions of the Charter, the provisions of these Bylaws shall control.

Article 8: Amendments

These Bylaws may be amended or repealed by a majority vote of the Board.

|

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CERTIFICATE OF ADOPTION OF BYLAWS

I certify that I am the elected and acting Chairman of Heritage Community Charter School, Inc., an Idaho nonprofit corporation, and that the foregoing Bylaws constitute the Bylaws of such corporation as adopted by the Board of Directors ~~on November 22, 2010.~~

Dated: _____

Signature

_____, Chairman
Heritage Community Charter School

12/12/2011 HCCS Programmatic Audit Notes

Board / Founder / Administration:

Several interviewees indicated that the board requires extensive training, as they do not understand their role. It appears the board is too focused on operational issues and does not spend adequate time on policymaking and fiduciary oversight.

Board turnover has been high, due partly to former board members resigning to accept employment at the school and partly to frustration with disorganized and ineffective board meetings and founders syndrome.

Founders syndrome appears to be a major problem at the school, affecting both the board's and administration's ability to perform their jobs effectively. Communication between the board and administration is very poor due to lack of trust and role definition.

The administration appears to lack understanding of the importance of providing detailed financial information to the board. Meanwhile, meeting materials and minutes reflect that the board has not focused on the school's finances.

Budget / Facility:

The school's board and administrator both appear to have limited understanding of the school's financial situation, which is potentially dire due to a costly facility lease and unanticipated Year One expenses, particularly for curriculum. The school's ability to remain fiscally viable depends on substantial increases in secondary enrollment over the next five years; such enrollment increases are likely to be endangered by negative media attention that could arise from the board/administrator dispute and concerns about the school's fiscal status.

The school's board seems to have signed its facility lease with a plan to purchase the building within a few years, which would remove concerns regarding annual increases in lease payments. However, the budget contains no plans for build a fiscal reserve adequate to cover a down payment and otherwise secure a loan or bonding.

Budgets and HCCS staff indicate that the school will incur net losses in Year One and Year Two. It is unclear whether the board understands this.

The board has not completed regular, thorough fiscal reviews and reconciliations at monthly meetings. Fiscal reports to the board have been incomplete and garnered little discussion; the board appears to have focused more on less substantial issues, while the staff has not understood the importance of obtaining the board's approval of the school's monthly financials.

Parent Focus Group:

The parent focus group consisted of four women, two Hispanic and two non-Hispanic, whose students ranged from grades K-6. One of the parents was involved with the founding of the school. All appeared well educated and several had experience as classroom teachers at other schools.

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The two, Hispanic parents selected Heritage primarily for its dual-language/Spanish immersion focus. The two, non-Hispanic parents chose Heritage for its high academic and behavioral standards. The Hispanic parents felt that HCCS is not fulfilling the promise of the charter, particularly because the split of mono-lingual Spanish speaking students and mono-lingual English speaking students is not 50/50. The parents did recognize that statute precludes HCCS from saving seats for Spanish speakers to ensure such a ratio. The non-Hispanic parents were pleased with the level of Spanish language instruction/immersion being provided and felt that the charter was being fulfilled; these parents were please with the school's academic focus.

The parents noted that while the school's "major" communications go out in both Spanish and English, many "minor" communications are sent only in English and via email, so some parents may not have access to that information.

All the parents represented agreed that class sizes are too large, especially in the youngest grades. They also agreed that classroom management is a problem in all grades.

Most of the parents agreed that the HCCS staff has worked hard to ensure a successful startup, and that the school's services are improving over the course of the year. The classical education model is working, and most students are receiving broad exposure to advanced information, though some first-year teachers don't seem to be as effective as the parents would prefer.

The Hispanic parents indicated that the school supplies fee of \$25, the cost of uniforms, and the perception that HCCS is an "elitist" school may discourage other Hispanic families from applying.

Two of the parents indicated that they had encountered difficulty in resolving issues, particularly with the school's board. The other two parents said they had not needed to contact the board because all issues had been resolved at the classroom teacher level.

All the parents indicated that the school's Parent Volunteer Organization has struggled to get established. Attendance at PVO meetings decreased from about 50 in the summer before school started to only 2-4 at this time. Several of the parents feel that their ideas are not considered by the PVO, they aren't welcome at meetings, the group is disorganized and has failed to appoint leaders, funds are poorly managed, and the HCCS board/founders control all PVO activity.

Classroom Observations:

- 1st grade – complete Spanish instruction, students excited about it, high student engagement, volunteer in class worked with disruptive students when directed to so by teacher.
- Kindergarten - a lot of students talking out of turn, loud class, students commented they could not hear because it was too loud, low student engagement, seems like class size is too big for teacher to manage well. One class had a volunteer who was not working with students and the other class had an extra adult working with students.
- 2nd grade – students working from workbook, most engaged, some Spanish vocabulary posted in room.
- High School Math – partner work, high engagement of students, gave calculator option, students gave explanation of how to solve problems, students encouraged to find mistakes and learn from them
- Room 134 – working on math worksheet, room very quiet, most students on task.

- Room 136 – students completing spelling pretest, high engagement, groups earned points for being on task, oral recitation of words as correcting, smooth transitions, played game using Spanish numbers, kids excited about using Spanish, worked to bell
- 7th, 8th Science – working on chemistry unit, completed quiz and students put answers on overhead, room somewhat messy and seemed unorganized, used whistle to get students attention students did not like it and did not respond to it, some students off task, choice of partner work or individual, instructions and materials explanation vague, dog wandering through room.
- 7th, 8th Math – students working on worksheet, teacher working examples with students, students engaged during instruction, some students off task during work time, allowed to work in groups, teacher rotated through room providing help.
- 9/10 History – teacher lecturing and questioning students, students taking notes, students on task, about a third of students engaged in discussion.

Class Observation Conclusions:

- Facility and class size seems adequate to meet needs
- Large class sizes in elementary grades present management challenges
- Based on limited observations curriculum seems to be aligned to state standards, no evidence of common core standard implementation
- High expectations evident in some subject areas and classrooms
- Formative assessment and monitoring of student understanding not evident in most classrooms
- School appears to be a safe environment for staff and students
- Expectations for positive student to student and student to teacher interactions seemed pretty clear
- Mission of school not clearly evident
- Culture not always consistently evident
- Lack of technology in classrooms
- Lack of a variety of instructional strategies
- Lack of higher level questioning
- Classroom management issues in many classes

Special Education Interview:

- Staff seems dedicated and knowledgeable
- 28 active SPED students, 8 in referral process, these numbers total about 7% of student population as special education, could be about 10 more identified
- Challenges include – a lot of severe mental health issues with students, overwhelming workload, identification of IEP students, obtaining student records, lack of home support, lack of space, high school student behaviors
- RTI model is in development stages – appears that teachers need additional training implementing interventions, progress monitoring occurring with CBM and AIMSWEB for Title I students, not clear on how data is used to drive instruction
- Hesitation to use PSR/IBI personnel because of Medicaid billing – it appears that some students really need the services and could potentially benefit from them
- Alternate assessment will be used for 4 students
- No complaints filed
- Communication can always be improved but reported as being effective, constant communication with teachers who seem to provide required accommodations

SUBJECT

Heritage Academy Annual Update and Proposed Charter Amendment

APPLICABLE STATUTE, RULE, OR POLICY

I.C. 33-5209(2)

IDAPA 08.02.04.302

BACKGROUND

Heritage Academy is a public charter school authorized by the Public Charter School Commission (PCSC). Located in Jerome, Heritage Academy opened in Fall 2011 and serves students in grades K-6 using a basic curriculum enhanced with the Schoolwide Enrichment Model.

DISCUSSION

Heritage Academy will provide an update on the status of the school. PCSC staff recently visited the school and makes the following observations:

Fall IRI results indicate that 68% of kindergarten students, 90% of 1st grade students, 56% of 2nd grade students, and 83% of 3rd grade students are reading at grade level. These results are not necessarily reflective of Heritage Academy's program as all students were new to the school this fall.

Heritage Academy's administrator is filling a broad range of roles, including serving as a classroom aide, providing computer lab and EL instruction, and filling the role of special education teacher as he works to obtain alternate special education certification.

Heritage Academy appears to be operating out of compliance with the approved charter in three areas. These issues were brought to the school's attention by PCSC staff during a September site visit; however, they have yet to be resolved.

1. The school is not providing enrichment clusters one-half day per week as required by Tab 3, Methods of Instruction. These clusters represent the most significant element of the Schoolwide Enrichment Model described in the charter.
2. The school is not providing foreign language instruction as required by Tab 3, Educational Goals.
3. The school has not hired a full-time special education coordinator as required by Tab 2, Special Education Coordinator.

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Heritage Academy faces potentially serious financial challenges in the coming years. Recent balance sheets reflect a general fund balance of \$287,000 and \$332,000 cash in the bank. However, current and upcoming year budgets show operating losses of \$97,000 and \$55,000, respectively. Although the school anticipates ending FY12 with a reserve of almost \$138,000, this reserve will decrease to \$72,000 by the end of FY13, leaving the school's future uncertain should the trend continue.

The school currently enrolls 147 students and has a limited waiting list of 26 students; grades 1 and 4 have no waiting lists. School officials estimate that, unless enrollment can be increased significantly, reserve accounts will be depleted by FY15.

Heritage Academy is attempting to refinance its facility through a USDA loan that would increase the term from 30 to 40 years while lowering the interest rate from 6.5% to 4%. The amount of the loan would be increased from \$350,000 to \$750,000 to pay for upgrades. School officials anticipate that monthly payments would be reduced by half while the upgrades would reduce maintenance costs.

Heritage Academy is proposing a charter amendment that would permit an enrollment increase via the addition of doubled classes on a schedule dictated by applications received. Increased enrollment would dramatically improve the financial outlook of the school. However, the budget scenarios provided indicate that the school will only achieve a net gain if it is successful in doubling kindergarten and 1st grade enrollment and filling grades 5 and 6 (which are currently under enrolled by half). The proposed amendment budgets also assume success of the refinancing plan prior to the beginning of FY13.

It remains unclear whether the projected enrollment numbers can actually be achieved, particularly given the school's small waiting list and lack of a clear marketing strategy. The board currently has no contingency plan for dealing with the possibilities of inadequate enrollment or inability to refinance.

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:...(a) Committed a material violation of any condition, standard or procedure set forth in the approved charter.

If the PCSC approves the proposed charter amendment, the school will immediately begin operating under the amended charter. If the PCSC denies the proposed charter amendment, Heritage Academy could appeal

this decision to the State Board of Education, or could decide not to proceed any further.

STAFF COMMENTS AND RECOMMENDATIONS

Staff recommends that the PCSC direct staff to issue to Heritage Academy a notice of defect on the grounds of violation of a material condition, standard, or procedure set forth in the approved charter, specifically with regard to Tab 3, Methods of Instruction and Educational Goals, and Tab 2, Special Education Coordinator.

Staff recommends the PCSC consider whether Heritage Academy has yet demonstrated a successful program such that the school should be considered a candidate for expansion. Although it appears unlikely the anticipated expansion will come to fruition, approval of the amendment would give the school flexibility to enroll as many students as possible, creating potential for improvement in the school's fiscal outlook.

Finally, staff recommends that the PCSC direct Heritage Academy to provide quarterly fiscal and enrollment updates until further notice, as well as updates regarding the possible facility refinance.

COMMISSION ACTION

A motion to direct staff to issue to Heritage Academy a notice of defect on the grounds of material violation of a condition, standard, or procedure set forth in the approved charter, specifically with regard to Tab 3, Methods of Instruction and Educational Goals, and Tab 2, Special Education Coordinator.

Moved by _____ Seconded by _____ Carried Yes _____ No _____

AND

A motion to approve the proposed charter amendment as submitted by Heritage Academy permitting an increase in the overall enrollment cap and doubling of classes as justified by enrollment numbers.

OR

A motion to deny the proposed charter amendment as submitted by Heritage Academy permitting an increase in the overall enrollment cap and addition of classes as justified by enrollment numbers.

Moved by _____ Seconded by _____ Carried Yes _____ No _____

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February 9, 2012



HERITAGE ACADEMY
500 S. Lincoln
Jerome, ID 83338

**HERITAGE ACADEMY
ANNUAL REPORT
February 9, 2012**

CHARTER SCHOOL DASHBOARD

Date: January 9, 2012

School Name: Heritage Academy
School Address: 500 S. Lincoln, Jerome, ID 83338
School Phone: 208-595-1617
Current School Year: 2011-2012

School Mission: Heritage Academy will allow students to participate in instruction leading them to develop meta-cognitive skills. Those skills will allow them to learn how to solve real-life problems and organize information. Our students will graduate with skills in both the core content areas and in critical thinking that lead to success in school, the workforce and the community.

CHARTER SCHOOL BOARD

Board Member Name	Office and Term	Skill Set(s)	Email	Phone
Kelly Bangerter	Board Chair/Ends July Board Meeting 2012	Law Enforcement	ktbangerter@gmail.com	208-731-2525
Blair Crouch	Vice Chair/ Ends July Board Meeting 2012	Business	crossroadspoint@live.com	208-280-1079
Anneli Crouch	Secretary/Ends July Board Meeting 2014	Business	accrouch@live.com	208-280-2610

Amanda Bingham	Ends July Board Meeting 2013	Business	a.bingham@live.com	208-410-5854
Kala Tate	Treasurer/ Ends July Board Meeting 2014	Marketing	jorisboxer1227@yahoo.com	208-420-5887
Scott Bybee	Ends July Board Meeting 2012	Business	sbybee@mindspring.com	208-421-7643

ENROLLMENT

Grade Level	Current Enrollment	Current ADA	Current Waiting List	Previous Year's Enrollment	Previous Year's ADA
K	25		15		
1	24		0		
2	25		2		
3	25		5		
4	23		0		
5	15		3		
6	10		1		
7					
8					
9					
10					
11					
12					
TOTAL	147	134.85	26		

Student Attrition Rate: Started with 130 students in September 2011 and have increased to 147 in January 2012.

Is your school planning to increase or decrease enrollment opportunities for the upcoming school year? yes

If yes, briefly describe planned enrollment changes, including numbers and grades affected:

Heritage Academy is planning to increase enrollment opportunities for 2012-2013 as follows:

1. HA currently has a combo class of 15-5th graders and 10-6th graders. We plan to separate this class into a 5th grade of 25 and a separate 6th grade of 25. This is needed to accommodate the 25-4th graders moving into 5th grade, and the 15-5th graders moving into 6th grade.
2. Increase kindergarten by 25 students to a total of 50 students – 25 AM and 25 PM.
3. Have the option, if the enrollment numbers justify it, to add an additional 1st grade in 2012, additional 2nd grade in 2013, and additional 3rd grade in 2014.

STUDENT DEMOGRAPHICS

School Year	Hispanic (# and %)	Asian (# and %)	White (# and %)	Black (# and %)	American Indian (# and %)	LEP (# and %)	FRL (# and %)	Special Education (# and %)
Current	18/12%	0	119/83%	0	5/.03%	2/.01%	85/59%	10/.06%
Previous								

FACULTY AND STAFF

Administrator Name(s): Randy Reddington
 Administrator's Hire Date: 7/1/2011
 Administrator Email(s): rreddington@heritageacademyid.org
 Current Classified Staff (# FTE):
 Classified Attrition Rate: 0
 Current Faculty (# FTE): 8.2
 Faculty Attrition Rate: 12%

EDUCATIONAL PROGRAM

Did your school make AYP during the last school year?
 If no, please specify indicator and status:
 If no, please describe plan for addressing need:
 Was your school selected to participate in NAEP this year?

REPORTING

Date of last programmatic operations audit? August 11, 2011 & September 1, 2011
 Date submitted to authorizer? September 2011
 Who performed your most recent programmatic audit? Idaho Charter School Network & Keellie Campbell
 Date of most recent fiscal audit?
 Date submitted to authorizer?

COMMENTS

Please describe any significant changes experienced by your school in the past year:
 Probably the most significant change experienced by Heritage Academy in the past year has been the move from a theoretical idea of a school into a functioning effective educational institution. As is the case with almost any major change, there have been growing pains, and experiences that have tested and challenged the school, the Board and the staff. Our students have been able to adjust to the new school situation and have been successful in most areas. We have been able to see tremendous growth among our students, and feel privileged to have been part of that process. We are now a functioning part of the educational system in the Jerome area, and look forward to continued growth and success.

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

We have been pleased to note that most of our students are performing above the state average on statewide testing. Since our IRI results showed few students performing significantly below grade level, we have been able to focus a large part of our efforts on students who were already approaching grade level in reading, and work toward their success and growth to meet their grade-level goals. We have also successfully launched a parent group that is actively involved in supporting the school with volunteers and fund-raising efforts. Our Fall Harvest Festival was actively supported by the community and was able to attract a large number of community members besides those directly involved in the school. We are also planning some community activities including helping out at the fairgrounds in the spring and working with community action groups to collect coats for kids and address community needs as the students see a need for their involvement and action.

Please describe any challenges you anticipate during the upcoming year:

One of the major challenges will continue to be how to meet the financial needs of a charter school and continue to convey our message to the greater community. We have relied on grants to help us get started, and we will continue to need additional funding sources in order to meet the needs of the students and the community.

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
- Exit interview data for most recent school year

HERITAGE ACADEMY

500 S. Lincoln
Jerome, ID 83338

ATTACHMENTS

Heritage IRI Fall 2011 Results

Heritage	3	2	1
k (25)	68.00%	28.00%	4.00%
1(21)	90.48%	9.52%	0.00%
2(25)	56.00%	36.00%	8.00%
3(24)	83.33%	12.50%	4.17%

3= Benchmark (formerly at grade level)
2=Strategic (formerly near grade level)
1=Intensive (formerly below grade level)

CHARTER COMMISSION AUDIT

September 1, 2011

R. Reddington's responses to Keelie Campbell's questions.

1. The full-time, on-site Special Education teacher presence will be provided by me applying for and being approved by the state department for the alternate route to certification for special education. This plan was developed jointly with Richard Henderson, Becky Martin, and Shannan Mayer, along with Betty Fredericksen and myself. The plan as it is outlined was approved by Richard Henderson, and is being implemented with assistance from the Regional Special Education Coordinator (Shannan Mayer).
2. The Special Education Multi-disciplinary team is being developed jointly by Betty Fredericksen and Randy Reddington, with the assistance and guidance of Shannan Mayer to make sure all issues are addressed by the plan for Special Education services at Heritage Academy.
3. We have been able to obtain the student records from the local school districts, allowing us to review and update student files to make sure that they are complete and correct. ISAT testing data from previous years is now available and included in student files. In addition, IRI testing

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conducted in the Fall of 2011 and in-school progress monitoring has helped us to develop a plan for targeted assistance under Title 1 to be provided to struggling students.

4. Current enrollment is at 143, seven short of our maximum enrollment. Students are slowly being added in an effort to bring enrollment to the 150 maximum allowed by our charter. Future plans for the school include the possible increase of classes beginning with Kindergarten, and possibly 1st grade next year, along with the addition of a separate 6th grade, as our current group of 5th grade student move to the next grade this coming year. In an effort to address our operating revenue, we are currently developing a plan for recruitment, as well as a proposed amendment to our charter to allow for an increase in enrollment.

FINANCIAL REPORTS

- Budget actuals for most recent month-end. SECTION A
- Budget estimates for remainder of current year, and fiscal outlook for next year. SECTION B
- Budget scenarios used to determine best option for increased enrollment. The Board voted in the December 15, 2011 board meeting to approve Scenario #3. SECTION C
- 3-yr Budget estimates for increased enrollment. SECTION D
- 6-yr Budget estimates for increased enrollment. SECTION E

SECTION A

ACCT #	ACCT NAME	BUDGETED	MTD ACTIVITY	YTD ACTIVITY	BALANCE	MTD%	YTD%
GENERAL FUND							
100-116200-000-000-0	DEPOSITS	0.00	0.00	561.00	561.00CR	0%	0%
100-320000-000-000-0	BUDGET BALANCE CARRY FORWARD	0.00	0.00	0.00	0.00	0%	0%
100-419000-000-000-0	EARNINGS ON INVESTMENT - GEN FUND	0.00	38.38CR	252.58CR	252.58	0%	0%
100-419200-000-000-0	CONTRIBUTIONS/GRANTS RECEIVED	500.00CR	0.00	0.00	500.00CR	0%	0%
100-419500-000-000-0	OTHER LOCAL REVENUE	0.00	632.50CR	1,591.50CR	1,591.50	0%	0%
100-431100-000-000-0	BASE STATE SUPPORT PROGRAM	520,746.00CR	0.00	442,942.00CR	77,804.00CR	0%	85%
100-431200-000-000-0	TRANSPORTATION SUPPORT	76,424.00CR	0.00	0.00	76,424.00CR	0%	0%
100-431800-000-000-0	STATE BENEFIT APPORTIONMENT	64,936.00CR	0.00	0.00	64,936.00CR	0%	0%
100-437000-000-000-0	IDAHO STATE LOTTERY REVENUE	6,500.00CR	0.00	0.00	6,500.00CR	0%	0%
100-439000-000-000-0	OTHER STATE REVENUE	4,200.00CR	0.00	0.00	4,200.00CR	0%	0%
100-442000-000-000-0	INDIRECT FEDERAL REVENUE	0.00	0.00	0.00	0.00	0%	0%
100-451000-000-000-0	LOAN PROCEEDS	0.00	0.00	0.00	0.00	0%	0%
100-460000-000-000-0	TRANSFERS FROM OTHER FUNDS	15,000.00CR	0.00	25,391.40CR	10,391.40	0%	169%
****TOTAL REVENUES		568,306.00CR	670.06CR	469,576.48CR	218,729.52CR	0%	66%
100-512100-000-000-0	TEACHER SALARIES - ELEMENTARY	0.00	0.00	0.00	0.00	0%	0%
100-512110-000-000-0	TEACHERS/CLASSIFIED SALARIES ELEM	222,860.00	17,545.75	89,584.00	153,596.00	8%	31%
100-512150-000-000-0	SUBSTITUTE SALARIES - ELEMENTARY	3,900.00	140.01	579.67	2,420.43	5%	19%
100-512200-000-000-0	EMPLOYEE BENEFITS - ELEMENTARY	16,446.00	452.54	6,646.84	11,799.16	2%	36%
100-512210-000-000-0	TEACHERS RETIREMENT	22,845.00	1,774.62	5,223.06	17,221.94	6%	24%
100-512250-000-000-0	TEACHERS SOCIAL SECURITY	0.00	1,092.24	3,249.99	(3,249.99)	0%	0%
100-512260-000-000-0	TEACHERS MEDICAL INS	34,960.00	2,015.94	8,136.87	16,823.13	0%	33%
100-512400-000-000-0	SUPPLIES - ELEMENTARY	1,000.00	0.00	897.26	302.74	0%	79%
100-512410-000-000-0	SUPPLIES	0.00	0.00	0.00	0.00	0%	0%
100-512500-000-000-0	EQUIPMENT - ELEMENTARY	0.00	0.00	0.00	0.00	0%	0%
100-512322-000-000-0	EQUIPMENT RENTAL	0.00	0.00	259.83	(259.83)	0%	0%
**TOTAL ELEMENTARY PROGRAM		292,911.00	23,920.26	94,254.22	196,656.78	8%	37%
100-521100-000-000-0	SALARIES - EXCEPTIONAL CHILD PROG	18,000.00	0.00	0.00	18,000.00	0%	0%
100-521200-000-000-0	EMPLOYEE BENEFITS - EXCEPT CHILD	2,250.00	0.00	0.00	2,250.00	0%	0%
100-521300-000-000-0	TRAVEL/PURCH SERVICES-EXCEP CHILD	0.00	0.00	0.00	0.00	0%	0%
100-521400-000-000-0	SUPPLIES - EXCEPTIONAL CHILD PROG	0.00	0.00	0.00	0.00	0%	0%
100-521500-000-000-0	SPECIAL SERVICES (SP ED CONTRACT)	7,900.00	0.00	1,983.88	5,916.12	0%	26%
**TOTAL EXCEPTIONAL CHILD PROGRAM		27,250.00	0.00	1,983.88	25,266.12	0%	7%
100-532300-000-000-0	TRAVEL/PURCH SERVICES - ACTIVITY	0.00	0.00	0.00	0.00	0%	0%
100-532400-000-000-0	SUPPLIES - ACTIVITY PROGRAM	0.00	0.00	0.00	0.00	0%	0%
**TOTAL ACTIVITY PROGRAM		0.00	0.00	0.00	0.00	0%	0%
100-521300-000-000-0	PURCHASED SERVICES - INST IMPROVE	0.00	0.00	0.00	0.00	0%	0%
100-521310-000-000-0	INSTRUCTIONAL IMPROVEMENT	0.00	0.00	3,150.00	(3,150.00)	0%	0%
100-521380-000-000-0	PURCHASED SERVICES TRAVEL EXPENSE	0.00	0.00	1,562.58	(1,562.58)	0%	0%
100-521390-000-000-0	MEMBERSHIPS DUES, FEES	1,610.00	8.00	111.50	1,498.50	0%	7%
100-521400-000-000-0	SUPPLIES - INSTRUCTION IMPROVEMENT	0.00	0.00	0.00	0.00	0%	0%
100-521410-000-000-0	INSTRUCT-RELATED TECH PROG	0.00	0.00	0.00	0.00	0%	0%
**TOTAL INSTRUCTION IMPROVEMENT		1,610.00	8.00	4,824.08	3,214.00CR	0%	300%
100-631300-000-000-0	BOARD OF EDUCATION - AUDIT/LEGAL	8,500.00	0.00	2,339.70	6,160.30	0%	27%
**BOARD OF EDUCATION EXPENSE		8,500.00	0.00	2,339.70	6,160.30	0%	27%
100-632110-000-000-0	ADMINISTRATOR SALARIES	67,000.00	5,583.33	33,469.98	33,500.02	8%	50%
100-632210-000-000-0	ADMINISTRATOR RETIREMENT	7,370.00	644.88	3,869.26	3,500.72	9%	53%
100-632220-000-000-0	ADMINISTRATOR SOCIAL SECURITY	5,360.00	427.13	2,552.77	2,797.23	8%	48%
100-632240-000-000-0	ADMINISTRATOR MEDICAL INS	4,992.00	418.90	2,492.70	2,499.30	8%	50%
100-632270-000-000-0	WORKERS COMPENSATION	3,764.00	0.00	1,195.00	2,569.00	0%	32%
100-641310-000-000-0	Professional Services	0.00	0.00	0.00	0.00	0%	0%
100-641410-000-000-0	ADMINISTRATION OFFICE SUPPLIES	0.00	0.00	0.00	0.00	0%	0%
100-641500-000-000-0	EQUIPMENT	0.00	0.00	0.00	0.00	0%	0%
**TOTAL DISTRICT ADMINISTRATION		88,476.00	7,072.24	43,619.73	46,856.27	8%	49%
100-651115-000-000-0	BUS MGR & ADMIN STAFF SALARIES	63,000.00	5,250.00	31,013.00	31,987.00	8%	49%
100-651210-000-000-0	BUS MGR & ADMIN RETIREMENT	6,930.00	606.38	3,536.71	3,393.29	9%	51%
100-651220-000-000-0	BUS MGR & ADMIN SOC SECURITY	5,040.00	461.87	2,372.48	2,667.52	6%	47%
100-651240-000-000-0	MEDICAL ADMIN STAFF	4,982.00	416.90	2,085.96	2,896.04	8%	42%
100-651300-000-000-0	PURCHASED SERVICE - BUSINESS OPN	20,000.00	0.00	20,000.00	0.00	0%	100%
100-651310-000-000-0	PROF SERVICES - BUS OPERATIONS	19,500.00	776.11	6,760.39	6,739.61	3%	44%
100-651350-000-000-0	CONTRACT SERVICES - BUS OPER	16,000.00	0.00	0.00	16,000.00	0%	0%
100-651360-000-000-0	BUS OPERATIONS TRAVEL	0.00	199.70	268.92	(268.92)	0%	0%
100-651400-000-000-0	SUPPLIES - BUSINESS OPERATION	1,000.00	108.68	1,022.30	(1,022.30)	11%	102%
100-651500-000-000-0	CAPITAL OBJECTS - BUS OPERATION	0.00	0.00	1,164.61	(1,164.61)	0%	0%
100-651650-000-000-0	EQUIPMENT - BUS OPERATIONS	500.00	0.00	652.00	(152.00)	0%	130%
100-651700-000-000-0	LIAB. INS. - BUSINESS OPERERATION	6,700.00	0.00	6,485.00	215.00	0%	97%
**TOTAL BUSINESS OPERATION		138,662.00	7,670.19	75,301.36	63,360.64	6%	54%
100-661100-000-000-0	SALARIES - CUSTODIAN	7,000.00	0.00	0.00	7,000.00	0%	0%
100-661150-000-000-0	BUILDING PURCHASE	0.00	0.00	9,351.40	(9,351.40)	0%	0%
100-661200-000-000-0	BENEFITS - CUSTODIAN	630.00	124.80	499.21	130.79	20%	79%
100-661300-000-000-0	PURCHASED SERVICE - BUILDING CARE	0.00	650.00	2,800.00	(2,800.00)	0%	0%
100-661350-000-000-0	FACILITY UTILITIES	0.00	0.00	0.00	0.00	0%	0%
100-661400-000-000-0	PHONE - CABLE ONE	0.00	0.00	0.00	0.00	0%	0%
100-661450-000-000-0	SUPPLIES - BUILDING CARE	0.00	0.00	0.00	0.00	0%	0%
100-661500-000-000-0	CAPITAL OBJECTS	0.00	0.00	0.00	0.00	0%	0%
100-661530-000-000-0	MORTGAGE FOR BUILDING	71,500.00	5,502.00	39,010.60	32,490.00	9%	55%

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ACCT #	ACCT NAME	BUDGETED	MTD ACTIVITY	YTD ACTIVITY	BALANCE	MTD%	YTD%
	**TOTAL BUILDINGS CARE/MAINTENANCE	79,130.00	7,276.80	51,460.61	27,669.39	9%	65%
100-663540-000-000-0	BLDG COMPONENTS - NON-STUDENT OCCU	0.00	0.00	1,740.87	(1,740.87)	0%	0%
	**TOTAL MAINTENANCE NON-STUDENT OCC	0.00	0.00	1,740.87	1,740.67CR	0%	0%
100-664310-000-000-0	PURCHASED SERVICES	2,500.00	0.00	847.44	1,652.56	0%	34%
100-664320-000-000-0	BUILDING SECURITY SYSTEM	0.00	35.00	250.50	(250.50)	0%	0%
100-664321-000-000-0	BUILDING RENTAL	0.00	0.00	0.00	0.00	0%	0%
100-664330-000-000-0	BLDG UTILITIES- ELECTRICITY	7,050.00	3,717.79CR	1,809.17	5,300.83	52%	23%
100-664334-000-000-0	BLG UTILITIES - WATER/SEWER	6,500.00	1,558.81	1,588.81	4,941.19	24%	24%
100-664340-000-000-0	BLG UTILITIES - NAT GAS	9,000.00	2,089.53	2,089.53	6,910.47	23%	23%
100-664350-000-000-0	BLG UTILITIES - TELEPHONE/INTERNET	6,000.00	1,647.69	1,647.69	4,352.31	27%	27%
100-664360-000-000-0	BLDG UTILITIES - TRASH	1,000.00	0.00	0.00	1,000.00	0%	0%
100-664410-000-000-0	CUSTODIAL SUPPLIES	3,000.00	99.03	1,231.62	1,768.38	3%	41%
100-664540-000-000-0	BUILDING COMPONENTS - STUDENT OCC.	41,000.00	0.00	36,594.40	4,405.60	0%	89%
	**TOTAL MAINTENANCE - STUDENT OCC	76,000.00	1,712.27	45,829.16	30,170.84	2%	60%
100-665300-000-000-0	MAINTENANCE - GROUNDS	8,000.00	353.58	1,073.55	6,926.45	4%	13%
	**TOTAL MAINTENANCE - GROUNDS	8,000.00	353.58	1,073.55	6,926.45	4%	13%
100-667300-000-000-0	SECURITY PROGRAM	0.00	0.00	0.00	0.00	0%	0%
100-667400-000-000-0	SUPPLIES - SECURITY PROGRAM	0.00	0.00	0.00	0.00	0%	0%
100-667500-000-000-0	EQUIPMENT - SECURITY PROGRAM	0.00	0.00	0.00	0.00	0%	0%
	**TOTAL SECURITY PROGRAM	0.00	0.00	0.00	0.00	0%	0%
	TRANSPORTATION PROGRAM						
100-320000-000-000-0	BUDGET BALANCE CARRY FORWARD	0.00	0.00	0.00	0.00	0%	0%
100-431200-000-000-0	TRANSPORTATION SUPPORT	76,424.00CR	0.00	0.00	76,424.00CR	0%	0%
	***TOTAL REVENUES	76,424.00CR	0.00	0.00	76,424.00CR	0%	0%
100-681340-000-000-0	TRANSPORTATION EXPENSE	89,910.00	0.00	21,172.50	68,737.50	0%	24%
100-681500-000-000-0	CAPITAL OBJECTS	0.00	0.00	0.00	0.00	0%	0%
	***TOTAL EXPENDITURES	89,910.00	0.00	21,172.50	68,737.50	0%	24%
100-710100-000-000-0	FOOD SERVICE SALARIES	0.00	0.00	0.00	0.00	0%	0%
100-710200-000-000-0	FOOD SERVICE BENEFITS	2,500.00	202.07	641.26	1,858.74	8%	26%
100-710310-000-000-0	FOOD PURCHASED SERVICES	0.00	0.00	0.00	0.00	0%	0%
100-710400-000-000-0	FOOD EXPENSES	0.00	0.00	0.00	0.00	0%	0%
100-710450-000-000-0	FOOD SERVICES OTHER	0.00	0.00	0.00	0.00	0%	0%
100-710500-000-000-0	FOOD SERVICE EQUIP	0.00	0.00	0.00	0.00	0%	0%
	**TOTAL FOOD SERVICE	2,500.00	202.07	641.26	1,858.74	8%	26%
100-810800-000-000-0	TRANSFER TO OTHER FUNDS	0.00	0.00	0.00	0.00	0%	0%
100-911600-000-000-0	DEBT SERVICE PRINCIPAL	0.00	0.00	0.00	0.00	0%	0%
100-912600-000-000-0	DEBT SERVICE INTEREST	0.00	0.00	0.00	0.00	0%	0%
100-926000-000-000-0	TRANSFERS TO OTHER FUNDS	0.00	0.00	688.30	(688.30)	0%	0%
100-950000-000-000-0	CONTINGENCY RESERVE	0.00	0.00	0.00	0.00	0%	0%
	***TOTAL EXPENDITURES	736,525.00	47,315.35	344,925.22	391,599.78	6%	47%

ACCT #	ACCT NAME	BUDGETED	MTD ACTIVITY	YTD ACTIVITY	BALANCE	MTD%	YTD%
ALBERTSON FOUNDATION							
230-320001-000-000-0	BUDGET BALANCE CARRYFORWARD	0.00	0.00	0.00	0.00	0%	0%
230-419200-000-000-0	JA & K ALBERTSON FOUNDATION GRANT	0.00	0.00	0.00	0.00	0%	0%
230-415000-000-000-0	INTEREST EARNED - ALBERTSONS	0.00	0.24	69.74CR	69.74	0%	0%
230-460000-000-000-0	TRANSFERS FROM OTHER FUNDS	0.00	0.00	688.30CR	688.30	0%	0%
	***TOTAL REVENUES	0.00	0.24	758.04CR	758.04	0%	0%
ALBERTSONS STAFF SUPPORT							
230-512300-000-000-0	PURCHASE SERVICE - ALBERTSON	0.00	0.00	0.00	0.00	0%	0%
230-621310-000-000-0	ALBERTSONS STAFF SUPPORT	0.00	0.00	0.00	0.00	0%	0%
230-621380-000-000-0	ALBERTSONS STAFF TRAVEL	0.00	0.00	0.00	0.00	0%	0%
230-641310-000-000-0	ALBERTSONS PROF SERV	0.00	0.00	0.00	0.00	0%	0%
230-641410-000-000-0	ALBERTSONS GRANT SUPPLIES	0.00	0.00	0.00	0.00	0%	0%
230-601530-000-000-0	FACILITY EQUIP	0.00	0.00	0.00	0.00	0%	0%
230-641350-000-000-0	ALBERTSONS EQUIPMENT	0.00	0.00	0.00	0.00	0%	0%
230-610500-000-000-0	BUILDING	0.00	0.00	0.00	0.00	0%	0%
230-512500-000-000-0	EQUIPMENT - ALBERTSON	0.00	0.00	0.00	0.00	0%	0%
230-512550-000-000-0	ALBERTSONS EQUIPMENT	0.00	0.00	0.00	0.00	0%	0%
230-020000-000-000-0	TRANSFERS TO OTHER FUNDS	15,000.00	0.00	28,311.40	(13,311.40)	0%	100%
	***TOTAL EXPENDITURES	15,000.00	0.00	28,311.40	13,311.40CR	0%	100%
TECHNOLOGY FUND							
245-320000-100-000-0	BUDGET BALANCE CARRY FORWARD	0.00	0.00	0.00	0.00	0%	0%
245-432400-000-000-0	PROFESSIONAL TECHNICAL REVENUE	4,000.00CR	0.00	2,113.00CR	1,887.00CR	0%	53%
245-439000-000-000-0	OTHER STATE REVENUE	0.00	0.00	0.00	0.00	0%	0%
	***TOTAL REVENUES	4,000.00CR	0.00	2,113.00CR	1,887.00CR	0%	53%
PURCHASE SERVICE							
245-512300-000-000-0	Purchase Service	0.00	0.00	0.00	0.00	0%	0%
245-512400-000-000-0	SUPPLIES-TECH FUND	0.00	0.00	0.00	0.00	0%	0%
245-512500-000-000-0	EQUIPMENT	0.00	0.00	1,937.46	(1,937.46)	0%	0%
	***TOTAL EXPENDITURES	0.00	0.00	1,937.46	1,937.46CR	0%	0%
TITLE I FUND							
251-320000-000-000-0	BUDGET BALANCE CARRY FORWARD	0.00	0.00	0.00	0.00	0%	0%
251-445100-000-000-0	REVENUE - TITLE I	35,446.00CR	0.00	0.00	35,446.00CR	0%	0%
	***TOTAL REVENUES	35,446.00CR	0.00	0.00	35,446.00CR	0%	0%
SALARIES - TITLE I							
251-512100-000-000-0	SALARIES - TITLE I	27,350.00	1,591.00	5,167.00	22,183.00	6%	19%
251-512200-000-000-0	BENEFITS - TITLE I	5,099.00	252.28	917.51	4,181.49	5%	18%
251-512300-000-000-0	TITLE IA - PARENT INVOLVEMENT	0.00	0.00	0.00	0.00	0%	0%
251-512400-000-000-0	TITLE IA - SUPPLIES	2,997.00	0.00	0.00	2,997.00	0%	0%
251-512500-000-000-0	TITLE IA EQUIPMENT	0.00	0.00	0.00	0.00	0%	0%
	***TOTAL EXPENDITURES	35,446.00	1,843.28	6,084.51	29,361.49	5%	17%

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ACCT #	ACCT NAME	BUDGETED	MTD ACTIVITY	YTD ACTIVITY	BALANCE	MTD%	YTD%
TITLE VI-B FUND							
257-320000-000-000-0	BUDGET BALANCE CARRY FORWARD	0.00	0.00	0.00	0.00	0%	0%
257-445600-000-000-0	REVENUE - TITLE VI-B	14,241.00CR	0.00	0.00	14,241.00CR	0%	0%
	****TOTAL REVENUES	14,241.00CR	0.00	0.00	14,241.00CR	0%	0%
257-521100-000-000-0	SALARIES - TITLE VI-B	7,000.00	2,823.50	5,120.50	1,879.50	40%	73%
257-521200-000-000-0	BENEFITS - TITLE VI-B	560.00	218.00	381.72	168.28	39%	70%
257-521300-000-000-0	PURCHASED SERVICES - TITLE VI-B	2,241.00	0.00	0.00	7,241.00	0%	0%
257-521400-000-000-0	SUPPLIES - TITLE VI-B	0.00	0.00	0.00	0.00	0%	0%
257-521500-000-000-0	EQUIPMENT - TITLE VI-B	0.00	0.00	0.00	0.00	0%	0%
	**TOTAL INSTRUCTION	14,801.00	3,039.50	5,512.22	9,289.78	21%	37%
257-691100-000-000-0	OTHER SUPPORT SERVICES SALARIES	0.00	0.00	0.00	0.00	0%	0%
257-691200-000-000-0	OTHER SUPPORT SERVICES BENEFITS	0.00	0.00	0.00	0.00	0%	0%
257-691400-000-000-0	OTHER SUPPORT SERVICES SUPPLIES	0.00	0.00	0.00	0.00	0%	0%
	**TOTAL SUPPORT SERVICES	0.00	0.00	0.00	0.00	0%	0%
	****TOTAL EXPENDITURES	14,801.00	3,039.50	5,512.22	9,289.78	21%	37%
TITLE IIA FUND							
271-445900-000-000-0	TITLE IIA - REVENUE	28,751.00CR	0.00	0.00	28,751.00CR	0%	0%
	****TOTAL REVENUES	28,751.00CR	0.00	0.00	28,751.00CR	0%	0%
271-512100-000-000-0	TITLE IIA - SALARIES	3,000.00	0.00	0.00	3,000.00	0%	0%
271-512200-000-000-0	TITLE IIA - BENEFITS	1,019.00	0.00	0.00	1,019.00	0%	0%
271-512300-000-000-0	TITLE IIA - PURCHASED SERVICES	24,732.00	0.00	143.68	24,588.32	0%	1%
271-512400-000-000-0	TITLE IIA - SUPPLIES	0.00	0.00	0.00	0.00	0%	0%
	****TOTAL EXPENDITURES	28,751.00	0.00	143.68	28,607.32	0%	0%

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ACCT #	ACCT NAME	BUDGETED	MTD ACTIVITY	YTD ACTIVITY	BALANCE	MTD%	YTD%
START UP GRANT							
288-32000-000-000-0	BUDGET BALANCE CARRYFORWARD	0.00	0.00	0.00	0.00	0%	0%
288-419200-000-000-0	STATE START UP GRANT	0.00	0.00	0.00	0.00	0%	0%
288-442000-000-000-0	START UP GRANT REVENUES	20,000.00CR	0.00	19,996.31CR	(3.69)	0%	100%
288-460000-000-000-0	TRANSFERS FROM OTHER FUNDS	0.00	0.00	2,966.00CR	2,966.00	0%	0%
	****TOTAL REVENUES	20,000.00CR	0.00	22,966.31CR	2,956.31	0%	115%
CHILD NUTRITION FUND							
288-512330-000-000-0	Start up grant curriculum	0.00	0.00	0.00	0.00	0%	0%
288-512400-000-000-0	SUPPLIES ELEMENTARY	0.00	0.00	0.00	0.00	0%	0%
288-512410-000-000-0	Start Up grant supplies	0.00	0.00	475.37CR	475.37	0%	0%
288-512440-000-000-0	textbooks	0.00	0.00	15,299.78	(15,299.78)	0%	0%
288-512500-000-000-0	EQUIPMENT ELEMENTARY	0.00	0.00	19,566.86	(19,566.86)	0%	0%
288-512500-000-000-0	Start Up Grant equipment	0.00	0.00	13,180.14CR	13,180.14	0%	0%
288-621300-000-000-0	TRAVEL PURCHASE SERVICE	0.00	0.00	0.00	0.00	0%	0%
288-621310-000-000-0	STAFF SUPPORT	0.00	0.00	0.00	0.00	0%	0%
288-621380-000-000-0	Travel for Professional Developmen	0.00	0.00	0.00	0.00	0%	0%
288-641310-000-000-0	START UP ADMIN SERVICES	0.00	0.00	1,584.13	(1,584.13)	0%	0%
288-641311-000-000-0	OFFICE ADMIN SERVICES	0.00	0.00	0.00	0.00	0%	0%
288-641410-000-000-0	START UP GENERAL SUPPLIES	0.00	0.00	0.00	0.00	0%	0%
288-641550-000-000-0	Start Up equipment	0.00	0.00	0.00	0.00	0%	0%
288-661410-000-000-0	START UP FACILITY SUPPLIES	0.00	0.00	0.00	0.00	0%	0%
288-664350-000-000-0	START UP PHONE SYSTEM	0.00	0.00	0.00	0.00	0%	0%
	****TOTAL EXPENDITURES	0.00	0.00	22,795.26	22,795.26CR	0%	0%
FOOD SERVICE							
290-320000-000-000-0	BUDGET BALANCE CARRY FORWARD	0.00	0.00	0.00	0.00	0%	0%
290-416100-000-000-0	REVENUE - STUDENT LUNCHES	0.00	16,454.86CR	30,881.08CR	30,881.08	0%	0%
290-416100-100-000-0	REVENUE - STATE REIMBURSEMENT	0.00	12,310.52	12,310.52	12,310.52CR	0%	0%
	****TOTAL REVENUES	0.00	6,144.34CR	18,670.56CR	18,670.56	0%	0%
290-710100-000-000-0	FOOD SERVICE SALARIES	0.00	1,500.00	4,943.67	(4,943.67)	0%	0%
290-710310-000-000-0	PURCHASED SERVICES - SCHOOL LUNCH	0.00	0.00	765.06	(765.06)	0%	0%
290-710400-000-000-0	FOOD - LUNCH PROGRAM	0.00	3,566.24	13,693.33	(13,693.33)	0%	0%
290-710450-000-000-0	OTHER FOOD SUPPLIES	0.00	0.00	601.46	(601.46)	0%	0%
290-710550-000-000-0	EQUIPMENT - LUNCH PROGRAM	0.00	0.00	2,244.07	(2,244.07)	0%	0%
	****TOTAL EXPENDITURES	0.00	5,006.24	22,247.59	22,247.50CR	0%	0%

ACCT #	ACCT NAME	BEG BALANCE	MTD ACTIVITY	YTD BALANCE
GENERAL FUND				
100-11100-000-000-0	CASH IN BANK - D. J. EVANS	326,748.47	46,638.49CR	280,111.98
100-111600-000-000-0	SAVINGS GENERAL	100.00	0.00	100.00
100-111800-000-000-0	PETTY CASH	7,555.07	8.00CR	7,547.07
100-112100-000-000-0	INVESTMENTS - GENERAL FUND	0.00	0.00	0.00
100-114000-000-000-0	ACCOUNTS RECEIVABLE - GENERAL FUND	0.00	0.00	0.00
100-114200-000-000-0	PAYROLL ADVANCES	0.00	0.00	0.00
100-118100-000-000-0	PREPAID LEASE	0.00	0.00	0.00
100-213000-000-000-0	ACCOUNTS PAYABLE - GENERAL FUND	0.00	0.00	0.00
100-213200-000-000-0	FUNDRAISING	0.00	0.00	0.00
100-213300-000-000-0	CLASS FEES	0.00	0.00	0.00
100-217100-000-000-0	SALARIES PAYABLE - GENERAL FUND	0.00	0.00	0.00
100-217200-000-000-0	BENEFITS PAYABLE - GENERAL FUND	0.00	0.00	0.00
100-320200-000-000-0	FUND BALANCE - GENERAL FUND	304,493.57CR	46,644.49	287,759.08CR
***NET TOTAL - BALANCE SHEET		0.00	0.00	0.00
ALBERTSON FOUNDATION				
230-111100-000-000-0	CASH IN BANK - ALBERTSON GRANT	58,658.34	0.24CR	58,658.34
230-114000-000-000-0	ACCOUNTS RECEIVABLE - ALBERTSON	0.00	0.00	0.00
230-213000-000-000-0	ACCOUNTS PAYABLE - ALBERTSON GRANT	0.00	0.00	0.00
230-320200-000-000-0	FUND BALANCE	58,658.34CR	0.24	58,658.34CR
***NET TOTAL - BALANCE SHEET		0.00	0.00	0.00
TECHNOLOGY FUND				
245-111100-000-000-0	CASH IN BANK - TECHNOLOGY FUND	175.64	0.00	175.64
245-114000-000-000-0	ACCOUNTS RECEIVABLE	0.00	0.00	0.00
245-213000-000-000-0	ACCOUNTS PAYABLE	0.00	0.00	0.00
245-320200-000-000-0	FUND BALANCE	175.64CR	0.00	175.64CR
***NET TOTAL - BALANCE SHEET		0.00	0.00	0.00
TITLE I FUND				
261-111100-000-000-0	CASH IN BANK - TITLE I	4,241.23CR	1,843.28CR	6,084.51CR
261-114000-000-000-0	ACCOUNTS RECEIVABLE - TITLE I	0.00	0.00	0.00
261-213000-000-000-0	ACCOUNTS PAYABLE - TITLE I	0.00	0.00	0.00
261-217100-000-000-0	SALARIES PAYABLE - TITLE I	0.00	0.00	0.00
261-217200-000-000-0	BENEFITS PAYABLE - TITLE I	0.00	0.00	0.00
261-221000-000-000-0	DEFERRED REVENUE	0.00	0.00	0.00
261-320100-000-000-0	FUND BALANCE - TITLE I	4,241.23	1,843.28	6,084.51
***NET TOTAL - BALANCE SHEET		0.00	0.00	0.00
TITLE VI-B FUND				
257-111100-000-000-0	CASH IN BANK - TITLE VI-B	2,472.72CR	3,039.60CR	5,512.22CR
257-114000-000-000-0	ACCOUNTS RECEIVABLE - TITLE VI-B	0.00	0.00	0.00
257-213000-000-000-0	ACCOUNTS PAYABLE - TITLE VI-B	0.00	0.00	0.00
257-217100-000-000-0	SALARIES PAYABLE - TITLE VI-B	0.00	0.00	0.00
257-217200-000-000-0	BENEFITS PAYABLE - TITLE VI-B	0.00	0.00	0.00
257-320100-000-000-0	FUND BALANCE - TITLE VI-B	2,472.72	3,039.60	5,512.22
***NET TOTAL - BALANCE SHEET		0.00	0.00	0.00
TITLE IIA FUND				
271-111100-000-000-0	CASH IN BANK - TITLE IIA	143.68CR	0.00	143.68CR
271-114000-000-000-0	ACCTS REC - TITLE IIA	0.00	0.00	0.00
271-213000-000-000-0	ACCTS PAY - TITLE IIA	0.00	0.00	0.00
271-320200-000-000-0	FUND BALANCE - TITLE IIA	143.68	0.00	143.68
***NET TOTAL - BALANCE SHEET		0.00	0.00	0.00
START UP GRANT				
288-111100-000-000-0	CASH IN BANK - START UP GRANT	3,975.86	0.00	3,975.86
288-111800-000-000-0	PETTY CASH START UP FUNDS	3,814.81CR	0.00	3,814.81CR
288-114100-000-000-0	Accounts Receivable	0.00	0.00	0.00
288-213100-000-000-0	Account Payable	0.00	0.00	0.00
288-320200-000-000-0	FUND BALANCE	161.05CR	0.00	161.05CR
***NET TOTAL - BALANCE SHEET		0.00	0.00	0.00
CHILD NUTRITION FUND				
280-111100-000-000-0	CASH IN BANK LUNCH	2,490.63CR	1,549.53	941.10CR
280-111600-000-000-0	PETTY CASH - FOOD	2,274.60CR	411.43CR	2,635.93CR
280-114000-000-000-0	ACCOUNTS RECEIVABLE LUNCHES	0.00	0.00	0.00
280-213000-000-000-0	ACCOUNTS PAYABLE - SCHOOL LUNCH	0.00	0.00	0.00
280-320100-000-000-0	FUND BALANCE SCHOOL LUNCH	4,716.13	1,138.16CR	3,577.97
***NET TOTAL - BALANCE SHEET		0.00	0.00	0.00
LONG TERM DEBT				
910-111100-000-000-0	Cash in Bank - Long Term Debt	0.00	0.00	0.00
910-132000-000-000-0	Ant provided retirement of Debt	0.00	0.00	0.00
910-233000-000-000-0	Lease Obligation	0.00	0.00	0.00

February 9, 2012

*** BALANCE SHEET *** HERITAGE ACADEMY

(Rprt: 01-MAIN REPORT; Dates: 00/00/00-12/31/11; PRINT: 01/10/12 3:57:46 PM)

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ACCT #	ACCT NAME	BEG BALANCE	MTD ACTIVITY	YTD BALANCE
910-320200-000-000-0	Fund Balance - Long term Debt	0.00	0.00	0.00
	**NET TOTAL - BALANCE SHEET	0.00	0.00	0.00

February 9, 2012

*** BALANCE SHEET *** HERITAGE ACADEMY

(Rpt: 01-MAIN REPORT; Dates: 09/09/00-12/31/11; PRINT: 01/10/12 3:47:46 PM)

MO-YR: 12-2011 12/31/11 PAGE 8

ACCT #	ACCT NAME	BEG BALANCE	MTD ACTIVITY	YTD BALANCE
C A S H I N B A N K				
100-11100-000-000-0	CASH IN BANK - D. J. EVANS	326,748.47	45,636.49CR	280,111.98
100-111800-000-000-0	SAVINGS GENERAL	100.00	0.00	100.00
100-111800-000-000-0	PETTY CASH	7,555.07	0.00CR	7,547.07
230-111100-000-000-0	CASH IN BANK - ALBERTSON GRANT	58,858.58	0.24CR	58,858.34
245-111100-000-000-0	CASH IN BANK - TECHNOLOGY FUND	175.54	0.00	175.54
261-111100-000-000-0	CASH IN BANK - TITLE I	4,241.23CR	1,843.28CR	6,084.51CR
267-111100-000-000-0	CASH IN BANK - TITLE VI-B	2,473.72CR	3,036.50CR	5,512.22CR
271-111100-000-000-0	CASH IN BANK - TITLE IIA	143.68CR	0.00	143.68CR
273-111100-000-000-0	Cash in Bank - DRUG FREE FUND	0.00	0.00	0.00
288-111100-000-000-0	CASH IN BANK - START UP GRANT	3,975.86	0.00	3,975.86
288-111800-000-000-0	PETTY CASH START UP FUNDS	3,814.81CR	0.00	3,814.81CR
290-111800-000-000-0	PETTY CASH - FOOD	2,224.50CR	411.43CR	2,635.93CR
420-111100-000-000-0	CASH IN BANK - PLANT FACILITY	0.00	0.00	0.00
810-111100-000-000-0	Cash in Bank - Gen. Fixed Asset	0.00	0.00	0.00
910-111100-000-000-0	Cash in Bank - Long Term Debt	0.00	0.00	0.00
**TOTAL CASH IN BANK		384,316.61	51,838.94CR	332,377.67

Special Education Coordinator

Heritage Academy will have at least one full time trained special education coordinator on staff at all times. The special education teacher will coordinate all special education related services and preside at all IEP meetings and initial team staffing meetings. The special education coordinator must possess the education, skills and credentials of a special educator who can work with appropriate professionals (school psychologist, speech and language pathologist, etc.) to select, administer and interpret assessments for determining special education eligibility. In addition, the special education coordinator will provide support and training (or coordinate trainings) for Heritage Academy's principal and staff to regarding the Individuals with Disabilities Education Act, the Idaho Special Education Manual and special education rules and requirements for Idaho public schools.

Employment Issues

All recommendations for hiring and firing of Heritage Academy employees, except for the school administrator, will made by the school administrator and subject to approval by the responsibility of the Board. The Heritage Academy Board of Directors will be responsible for hiring a school administrator and for any personnel actions directly involving the school administrator. The principal, teachers, and other staff members may be selected to serve on hiring committees. The hiring committees will screen applicants and decide whom to interview. Individuals will be selected based on school needs and individual qualifications. All hiring will be approved through the Board, and candidates will be offered positions at Heritage Academy only upon Board approval.

Management of School Equipment & Supplies

Teachers will be responsible for all materials and supplies within their rooms. Yearly inventories will be used for insurance purposes and to assess replacement needs. Teacher supplies will be allocated on an "as-needed" basis, with the Director determining the "need." Each teacher will receive a budget for supplies and equipment, which may be purchased in accordance with Heritage Academy's Fiscal Policy.

Governing Board

The Governing Board is the ultimate policy-making organization and retains total control in the selection or removal of any service organization serving the school, the principal and school employees. No person that is an officer, director or shareholder in any service organization serving the school will serve as a member of the Governing Board of the School or vote on any matter affecting the school's relationship with the service organization(s). Any Governing Board member who serves as an officer, director or shareholder in any service

The final component involves Enrichment Learning and Teaching. This program consists of forming Enrichment Clusters. The goal is to apply knowledge and skills to produce a product or deliver a service for a community audience. Enrichment facilitators may include teachers, parents or community resource persons. Enrichment Clusters will meet one-half day each week, they will receive extra support and guidance in selecting activities and projects.

Dr. Renzulli's model does not replace existing school structure or curriculum, but seeks to improve them by providing enriched and challenging learning opportunities to all students based on personal interests. Heritage Academy will use research based and challenging curriculum as the basis for general instruction.

Heritage Academy may also purchase scientifically research based curriculum and materials as supplementary materials or for core classes in order to most effectively meet the needs of students in core content areas including math, science, language arts, reading and social studies. Heritage Academy will establish a curriculum committee responsible for initial selection and ongoing analysis of student achievement and review of curriculum. The committee will consider current research and will review the Idaho Department of Education approved curriculum lists in an effort to select the most effective instructional materials for students at the school.

Special Emphasis:

Heritage Academy will provide a solid foundation of knowledge that addresses a variety of topics. Although the curriculum will be generalized, Enrichment Cluster's will allow each student to pursue personal interests and talents. Our emphasis is creating an individualized learning environment that helps each student reach his/her potential.

Individuality is built into SEM through use of the Total Talent Portfolio (TTP). It is unique from many traditional assessment tools in that it focuses on strengths and "high-end learning" behaviors, rather than focusing on deficiencies. Portfolios use assessment tests and actual student work to determine student's interests and learning styles as well as their cognitive abilities. These portfolios will include student directed improvement goals along with follow up and self-assessment, which will be added at the bi-annual parent, teacher, student conference. The portfolio will follow students throughout their education and will serve as a tool to document personal growth and achievement. The portfolio will include the very best things we know about each student. Heritage Academy will use this information to develop appropriate enrichment activities and develop an individualized learning environment based on each student's strengths and talents.

		instills a sense of individual, social, and civic responsibility and enables the student to use newly found knowledge to solve community problems.
Standard 4: The skills necessary to communicate effectively are taught.	Teach students a range of effective communication skills appropriate for the 21 st century.	Heritage Academy will: <ol style="list-style-type: none"> 1. Emphasize meaningful language experience in language arts, enhanced by writing and memorization. 2. Provide access to computers to teach students basic computer skills and, in the older grades, appropriate communication through technology (via e-mail and the internet). 3. Provide instruction in a foreign language. Knowledge of a second language is essential in many occupations. In addition, knowledge of a second language will boost English proficiency, improve memory and self-discipline, and enhance verbal and problem-solving skills.
Standard 5: A basic curriculum necessary to enable students to enter academic or professional-technical post-secondary educational programs is	Develop an educated citizenry for the 21 st century through a proven academic program where all students are offered an advanced curriculum.	Heritage Academy will: <ol style="list-style-type: none"> 1. Use the Idaho State Standards as a starting point to be enhanced by unifying themes and other creative methods. 2. Offer a solid health curriculum as required by the state.

Heritage Academy December 15, 2011	Proposed (Board Approved Budget for Fiscal Year)	Actual (Through Most Recent Month End)	Projected (Anticipated Year- End Numbers)	Percentage Used (Actual / Proposed)	Notes
REVENUE					
Salary Apportionment	\$358,537.00	\$442,942.00	\$363,738.00	123.54%	140 Enrollment - based on current salary based apportionment
Benefit Apportionment	\$64,654.00		\$64,937.00	0.00%	
Entitlement	\$164,575.00		\$157,008.00	0.00%	Proposed budget enrollment was 150; Projected is 13C
State Transportation	\$40,500.00		\$76,424.00	0.00%	85% of cost
Lottery		\$6,500.00	\$6,500.00	#DIV/0!	Actual Lottery payment
Other State Funds (Specify)	\$4,200.00		\$4,200.00	0.00%	ISAT remediation, IRI, Technology 33-1022
Special Ed - Regular	\$30,000.00		\$14,241.00	0.00%	
Special Ed - ARRA				#DIV/0!	
Title I	\$15,000.00		\$35,083.00	0.00%	
Federal Title I Funds : ARRA				#DIV/0!	
Medicaid Reimbursement				#DIV/0!	
Title IIA	\$0.00		\$28,669.00	#DIV/0!	
Local Revenue (Specify)				#DIV/0!	
Federal Startup Grant				#DIV/0!	
Other Grants (Specify)				#DIV/0!	
Fundraising	\$500.00		\$2,500.00	0.00%	Several fundraisers planned
Interest Earned				#DIV/0!	
Other (Specify)				#DIV/0!	
Other (Specify)				#DIV/0!	
TOTAL REVENUE	\$677,966.00	\$449,442.00	\$753,300.00	66.29%	
EXPENDITURES					
100 Salaries					
Teachers	\$196,681.00	\$94,254.00	\$211,310.00	47.92%	4@\$31750; 1@38,000 (K-Title I); 1@46,20C
Special Education	\$48,846.00	\$5,512.00	\$18,000.00	11.28%	.2 Special Education Teacher; Principal is going through alternate route to become certified as on-site coordinato
Instructional Aides	\$27,360.00		\$21,000.00	0.00%	Title I Aides covered in Title I funding; 3 @ .5FTE
Classified/Office	\$63,000.00	\$31,013.00	\$63,000.00	49.23%	
Administration	\$67,000.00	\$36,547.00	\$67,000.00	54.55%	
Maintenance	\$0.00	\$584.00	\$7,000.00	#DIV/0!	Custodial salary; contract lawn care moved to line 63- Proposed budget has maintenance on line 6:
Other (Specify)				#DIV/0!	IT Support - contract moved to line 53
Other (Specify)			\$7,000.00	#DIV/0!	Spec Ed Aide - \$7,000 .5 FTE
Total Salaries	\$402,887.00	\$167,910.00	\$394,310.00	41.68%	
200 Employee Benefits					
PERSI/FICA/Benefits	\$112,212.00	\$40,266.00	\$109,252.00	35.88%	
Other (Specify)				#DIV/0!	
Total Benefits	\$112,212.00	\$40,266.00	\$109,252.00	35.88%	
300 Purchased Services					
Management Services	\$20,000.00	\$20,000.00	\$20,000.00	100.00%	Final payment made in August 2011
Staff Dev/Title IIA			\$28,670.00	#DIV/0!	covered in Title II funding above
Legal Pub/Advertising	\$500.00		\$500.00	0.00%	Advertising/Marketing
Legal Services	\$3,500.00		\$3,500.00	0.00%	Legal/permits/fees
Special Education	\$15,000.00	\$1,983.00	\$15,000.00	13.22%	Contract services
Liability & Property Ins	\$8,500.00	\$6,485.00	\$6,700.00	76.29%	Actual
Substitute Teachers	\$3,000.00	\$439.00	\$3,000.00	14.63%	
Board Expenses				#DIV/0!	
Computer Services	\$2,500.00		\$2,500.00	0.00%	testing/assessment
Transportation	\$54,000.00	\$21,172.00	\$89,910.00	39.21%	Actual from Northside Bus contract
Travel				#DIV/0!	
Other (Specify)	\$15,000.00	\$6,760.00	\$15,000.00	45.07%	copier lease/2M support/IT support
Other (Specify)	\$6,000.00	\$4,816.00	\$7,610.00	80.27%	audit fee/memberships
Total Services	\$128,000.00	\$61,655.00	\$192,390.00	48.17%	
Facilities					
Building Lease	\$71,500.00	\$39,010.00	\$71,500.00	0.00%	
Land Lease				#DIV/0!	
Modular Lease				#DIV/0!	
Utilities, Phones, Lndscp	\$29,580.00	\$6,903.00	\$29,580.00	1.48%	

February 9, 2012

CURRENT FISCAL YEAR BUDGET COMPARISON

Site Preparation				0.00%	
Other (Specify)	\$41,000.00	\$36,594.00	\$49,000.00	#REF!	Maintenance & Repairs to building - added contract lawn care from line 31
Other (Specify)				#DIV/0!	
Total Facilities	\$142,080.00	\$82,507.00	\$150,080.00	58.07%	
400 Supplies and Maintenance					
Textbooks				#DIV/0!	Will use \$13,000 awarded from left over StartUp grant from Feds
School Supplies	\$500.00	\$697.00	\$1,000.00	139.40%	
Power School				#DIV/0!	
Custodial Supplies	\$6,000.00	\$1,231.00	\$3,000.00	20.52%	Used \$3,000 from Start Up grant to pre-stock custodial supplies for 2011-12
Other (Specify)				#DIV/0!	
Other (Specify)				#DIV/0!	
Total Supplies	\$6,500.00	\$1,928.00	\$4,000.00	29.66%	
500 Capital Objects					
Furniture	\$500.00		\$500.00	0.00%	
Technical AV Equipment				#DIV/0!	
Other (Specify)				#DIV/0!	
Other (Specify)				#DIV/0!	
Other (Specify)				#DIV/0!	
Other (Specify)				#DIV/0!	
Total Capital Objects	\$500.00	\$0.00	\$500.00	0.00%	
Debt Service					
Specify				#DIV/0!	
Specify				#DIV/0!	
Specify				#DIV/0!	
Total Debt Service	\$0.00	\$0.00	\$0.00	#DIV/0!	
Grant Purchases					
Specify				#DIV/0!	
Specify				#DIV/0!	
Specify				#DIV/0!	
Specify				#DIV/0!	
Specify				#DIV/0!	
Total Grant Purchases	\$0.00	\$0.00	\$0.00	#DIV/0!	
Reserve Fund				#DIV/0!	
Building Fund				#DIV/0!	
Total Expenses	\$792,179.00	\$354,266.00	\$850,532.00	44.72%	
Carryover from Previous FY	\$230,000.00	\$0.00	\$235,000.00	0.00%	Albertson's Grant
Reserve/(Deficit)	\$115,787.00	\$95,176.00	\$137,768.00	82.20%	

Heritage Academy December 15, 2011	Proposed Budget	Notes		
REVENUE				
Local Revenue				
State Revenue	\$598,096.00			
Entitlement		Projected enrollment is 150		
Wages				
Administration				
Teachers				
Classified				
Medicaid				
Benefit				
Transportation	\$76,424.00	85% of actual costs		
Federal Revenue				
Title I	\$36,000.00			
Special Ed	\$15,000.00			
Title II	\$29,917.00			
Startup Grant				
Other Sources (Specify)	\$7,700.00	Technology, fund raising, ISAT, IRI		
Other Sources (Specify)	\$7,000.00	lottery		
Other Sources (Specify)				
Total Revenue before holdback	\$770,137.00			
PROPOSED HOLDBACK		Holdbacks should be estimated at a minimum of 5% - 5.5% for FY 2011.		
Teacher Salaries	\$10,565.00	\$211,310 x .05%		
Classified Salaries				
Admin Salaries				
Benefits				
Entitlement				
Transportation				
Total Holdback	\$10,565.00			
Total Revenue after holdback	\$759,572.00			
EXPENDITURES				
100 Salaries				
Teachers	\$211,310.00			
Admin	\$67,000.00			
Classified	\$103,250.00	Bus Mgr, Sec, Title I Aides, Spec Ed Aide, Custodial		
Special education	\$25,000.00			
Other (Specify)				
Other (Specify)				
Total Salaries	\$406,560.00			
200 Benefits				
Benefit Dollars				
PERSI/Payroll taxes	\$110,039.00			
Other (Specify)				
Total Benefits	\$110,039.00			
300 Purchased Services				
Transportation	\$89,910.00	Same as last year as there is room on the buses for addt'l kids		
Special Education	\$15,000.00			
Proctor costs				
Legal	\$3,500.00			
Insurance	\$6,700.00			
Copier Lease	\$11,000.00			
Printer Lease				
Facility Lease	\$71,500.00			
Utilities	\$29,580.00			
Professional Development	\$28,670.00	Title II funding		
Technology	\$6,100.00	Testing/Assessment - IT Support (\$3,600)		
Management Services	\$0.00			
Legal Publications/Advertising	\$500.00			
Substitute Teachers	\$3,000.00			

February 9, 2012

UPCOMING FISCAL YEAR BUDGET COMPARISON

Board Expenses		
Other (Specify)	\$28,000.00	Maintenance & repair of building - moved \$8,000 from salaries for contract lawn/maintenance care
Other (Specify)	\$7,610.00	Prog & Financial Audit/memberships
Total Purchased Services	\$301,070.00	
Supplies & Materials		
Teacher/Classroom	\$1,000.00	
Office	\$500.00	
Janitorial	\$6,000.00	
Textbooks		
Other (Specify)		
Other (Specify)		
Total Supplies & Materials	\$7,500.00	
Grant Expenditures		
Specify		
Specify		
Specify		
Total Grant Expenditures	\$0.00	
Capital Outlay		
Total Capital Outlay	\$0.00	
Debt Retirement		
Total Debt Retirement	\$0.00	
Insurance & Judgements		
Total Insurance & Judgements	\$0.00	
Transfers		
Total Transfers	\$0.00	
Contingency Reserve	\$0.00	
Building Fund	\$0.00	
Total Expenditures	\$825,169.00	
Carryover from Previous FY	\$137,768.00	Reflects projected reserve/(deficit) from "current year" worksheet
Reserve/(Deficit)	\$72,171.00	

February 9, 2012



Building upon a noble heritage.

Heritage Academy
500 South Lincoln Ave
Jerome, ID 83338
(208) 595-1617

January 13, 2012

Idaho Public Charter School Commission
650 W. State Street
P. O. Box 83720
Boise, ID 83720-0037

RE: Heritage Academy Charter Amendment for Increased Enrollment

Dear Commissioners:

Attached is the proposed Amendment with legislative formatting to Heritage Academy's charter. Based on the capacity of its facility and success of its program, Heritage Academy is petitioning for a gradual increase in enrollment over the next years of operation, bringing the enrollment capacity to a maximum of 450 students in grades K-8.

Heritage Academy further requests to have the option of adding one additional class each year per grade if the application numbers justify these additions. It is the intent of the Heritage Academy founders to be able to serve Heritage Academy's growing student population as students move from grade to grade. Our current facility has capacity for two classes per grade up to and including 6th grade.

Let me know if you have any additional questions.

Sincerely,

Kelly Bangerter
Board Chair
Heritage Academy

Attachment - Proposed Charter Amendment

Target Student Population

Heritage Academy will open in the fall of 2011 within the boundaries of the Jerome School District and will serve a maximum of 175 students in grades K-6. For more information on the educational atmosphere and demographics, please reference Appendix J – Market Analysis. We project full enrollment of one class per grade in grades K-4 and one combined class of 25 for 5th and 6th grade. Heritage Academy in year two will increase the Kindergarten class size to a cap of 25 students in the A.M. class and cap of 25 students in the P.M. class. Heritage Academy, starting in year two, will also have the option to add one additional class per year starting with grade 1, if the application numbers justify these additions in grades 1- 6, with a cap of 25 students per class. As enrollment numbers expand Heritage Academy will to expand the grade offering to grades K-8 in subsequent years as determined by the board of directors, and as application numbers justify these additional grades. In the 7th and 8th grades, Heritage Academy will have a cap of 50 students per grade. As Heritage Academy's program matures, and in the event it is in the best interest of Heritage Academy, the board may seek approval from the IPCSC to serve additional grades.

Deleted: The founders of Heritage Academy acknowledge that it is not realistic that the school will open with full enrollment in its first year. Therefore, the —best case! budget assumptions contained within this petition

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Projected Enrollment Capacity

Based on the capacity of its facility and program, Heritage Academy's enrollment capacity is 450 students in grades K-8.

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		SCENARIO #1	5th grade is 25; Add 6th grade class with 25. Hire 1 additional teacher							
		SCENARIO #2	In addition to above add additional K class with 20 so K would be 40 students. Hire addtl Aide							
		SCENARIO #3	In Addition to above add a 2nd first grade class. Hire 1 additional teacher. NOTE: SCENARIO #3 WAS APPROVE							
		**ALL SCENARIOS include adding a full time Title I/SPED teacher								
HERITAGE ACADEMY										
	12/1/11 SCENARIOS	SCENARIO #1			SCENARIO #2			SCENARIO #3		
		Number	Rate	Amount	Number	Rate	Amount	Number	Rate	Amount
	Number of Students	K-4 = 125	1 class EA of 25		Two K classes-40			Two K classes - 40, 2 -1st grade		
		5th grade 25; 6th grade 25			5th & 6th grade- 25 each			5th & 6th grade- 25 each		
	Revenues:	Total 175	(8.5 units)		Total 190 students (8.7 units)			Total 215 students (10.2 units)		
	State Apportionment		3,599	629,844		\$ 3,387	\$643,624		3,464	744,853
	State Transportation		80%	71,928		80%	71,928		80%	71,928
	Nutrition Program			0		\$ -	0			0
	Federal Grants Title I-A &II-A			65,000			70,000			75,000
	IDEA			15,000			20,000			25,000
	Albertsons Grant									
	Fundraising			3,500			5,000			5,000
	ISAT remediation			1,000			1,000			1,000
	IRI			200			200			200
	Technology 33-1022			4,000			6,000			6,000
	Lottery			6,500			8,000			8,000
	Insert Revenue Lines Here									
	Total Revenues			\$ 796,972			\$825,752			\$ 936,981
	State Holdback - 5%			39,849			41,288			46,849
	Total Revenues after Holdback			\$ 757,123			\$ 784,464			\$ 890,132
	Expenses:									
	Salaries:									
	Teachers- K,1st,3rd,4th,5th,6	\$ 31,752	6	\$190,512	\$ 31,752	6	\$190,512	\$ 31,752	7	\$222,264
	2nd grade Teacher	\$ 46,200	1	\$46,200	\$ 46,200	1	\$46,200	\$ 46,200	1	\$46,200
	Title I-Spec Ed Teacher	\$ 40,000	1	40,000	\$ 40,000	1	40,000	\$ 40,000	1	40,000
	Spec. Ed. Aide - 1	\$ 7,000	.5	7,000	\$ 7,000	0.5	7,000	\$ 7,000	0.5	7,000
	Instruct Aids/misc - Title I	\$ 7,000	3	21,000	\$ 7,000	.5x4	28,000	\$ 7,000	4	28,000
	Business Manager	\$ 45,000	1	45,000	\$ 45,000	1	45,000	\$ 45,000	1	45,000
	Administration	\$ 67,000	1	67,000	\$ 67,000	1	67,000	\$ 67,000	1	67,000
	Secretary	\$ 18,000	1	18,000	\$ 18,000	1	18,000	\$ 18,000	1	18,000
	Custodian (maint to exp)	\$ 7,000	1	7,000	\$ 7,000	1	7,000	\$ 700	1	7,000
	Insert Salaries Lines Here									
	Total Salaries			\$441,712			\$448,712			\$480,464

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	Benefits:								
	Retirement/PERSI	11.0%		\$ 45,508	11.0%		\$ 45,508	11.0%	\$ 49,001
	Health/Life Insurance	417 x 9		37,530	417 x 9		37,530	417 x 10	41,700
	Payroll Taxes	8.0%		35,337	8.0%		35,897	8.0%	38,437
	Workers Compensation	1.1%		4,859	1.1%		4,936	1.1%	5,285
	Insert Benefits Lines Here								
	Total Benefits			\$123,234			\$123,871		\$ 134,423
	Operating Expenses:								
	Textbooks			\$0			\$0		\$0
	Supplies			\$2,000			\$2,000		\$2,000
	Equipment			\$500			\$500		\$500
	Contract Svcs-copier, IT			\$15,000			\$15,000		\$15,000
	SPED Contract services			\$15,000			\$15,000		\$15,000
	Legal			\$2,500			\$2,500		\$2,500
	Prog&Financial Audit			\$6,000			\$6,000		\$6,000
	Advertising/Marketing			\$500			\$500		\$500
	Gas/Electric/Telephone			\$29,580			\$29,580		\$29,580
	Liability & Property Insurance			\$6,700			\$6,700		\$6,700
	Testing & Assessment			\$1,500			\$1,500		\$1,500
	Mortgage			\$35,000			\$35,000		\$35,000
	Permits/Fees			\$1,000			\$1,000		\$1,000
	Custodial Supplies			\$6,000			\$6,000		\$6,000
	Grounds & Maintenance			\$8,000			\$8,000		\$10,000
	Management Fees								
	Prof. Dev. Title II-A			\$28,670			\$30,000		\$35,000
	Substitutes			3,000			3,000		3,000
	Memberships(ISBA,Chamber,Council,Admin)			\$1,610			\$1,610		\$1,610
	Insert OE Lines Here								
	Total Operating Expenses			\$162,560			\$163,890		\$170,890
	Program Expenses:								
	Transportation (actual)			\$89,910			\$89,910		\$89,910
	Nutrition Program	\$ -		0	\$ -		0	\$ -	0
	Insert Program Expenses Lines Here								
	Total Benefits			\$89,910			\$89,910		\$89,910
	Total Expenses			\$817,416			\$826,383		\$875,687
	Net Operating Income/(Loss)			-\$60,293			-\$41,919		\$14,445

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		Yr 2-4 budget w approved amend									
		Year 2 (FY 2013)		Year 3 (FY 2014)		Year 4 (FY 2015)		NOTES: School notes in plain text. PCSC Staff notes in italics.			
		Number		Number		Number					
Number of Students K		50		50		50		Year 2 add 25 kindergarteners; add add'l 1st grade; separate 6th grade			
Number of Students 1-3		100		125		150		Year 3 add add'l 2nd grade			
Number of Students 4-6		75		75		75		Year 4 add add'l 3rd grade			
Number of Students 7-12											
Exceptional											
Total Number of Students		225		250		275					
Revenues:											
State Apportionment			\$744,853		\$807,821		\$889,337				
State Transportation		80%	71,928	80%	71,928	80%	71,928				
Nutrition Program			0		0		0				
Federal Grants			75,000		80,000		82,000				
Contributions/Donations			5,000		5,000		5,000				
State Revenue (IRI/LEP/Except/Voc)			7,200		7,200		7,000				
IDEA			25,000		25,000		28,000				
Lottery			8,000		10,500		12,000				
Insert Revenue Lines Here											
Total Revenues			\$936,981		\$1,007,449		\$1,095,265				
Expenses:											
Salaries:											
Teachers		8	\$268,464	9	\$308,200	10	\$340,200				
Special Ed			40,000		40,000		40,000				
Spec Ed Aide	\$ 1	0.5	7,000	0.5	7,000	0.5	7,000				
Instructional Aides- Title I	\$ 4	0.5	28,000	\$ 5	0.5	35,000	\$ 5	0.5	35,000		
Classified/Office Staff			63,000		63,000		63,000				
Administration			67,000		67,000		67,000				
Nutritional Program			0		0		0				
Librarian			0		0		0				
Custodian			7,000		7,000		7,000				
Insert Salaries Lines Here											
Total Salaries			\$480,464		\$527,200		\$559,200				
Benefits:											
Retirement/PERSI	11.0%		\$49,001	11.0%	\$53,372	11.0%	\$56,892				
Health/Life Insurance	325 x 10		39,000	325 x 11	42,900	325 x 12	46,800				
Payroll Taxes	8.0%		38,437	8.0%	42,180	8.0%	44,740				
Workers Compensation	1.1%		5,285	1.1%	5,800	1.1%	6,150				
Insert Benefits Lines Here											
Total Benefits			\$131,723		\$144,252		\$154,582				
Operating Expenses:											
Textbooks			\$9,000		\$6,200		\$6,400				
Supplies			\$7,000		\$7,000		\$9,000				
Equipment			\$1,500		\$1,500		\$1,500				
Contract Services			\$15,000		\$15,000		\$20,000				
Legal			\$2,500		\$2,500		\$2,500				
Accounting			\$0		\$0		\$0				
Advertising/Marketing			\$1,000		\$1,000		\$1,000				
Gas/Electric/Water			\$16,500		\$16,500		\$16,500				
Telephone			\$4,000		\$4,000		\$4,000				

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	Liability & Property Insurance		\$6,700		\$6,700		\$6,700
	Testing & Assessment		\$1,000		\$1,200		\$1,500
	Staff Development - Title II		\$35,000		\$38,000		\$39,000
	Membership/Fees		\$2,610		\$2,610		\$2,610
	Custodial Supplies		\$6,000		\$6,000		\$8,000
	Substitutes		\$3,000		\$4,000		\$5,000
	Mortgage		\$35,000		\$35,000		\$35,000
	Audits		\$6,000		\$6,000		\$6,000
	Grounds & Maintenance		\$8,000		\$8,000		\$8,000
	Miscellaneous						
	Insert OE Lines Here						
	Total Operating Expenses		\$159,810		\$161,210		\$172,710
	Program Expenses:						
	Transportation		\$89,910		\$89,910		\$89,910
	Nutrition Program		0		0		0
	Title I		40,000		42,000		43,000
	Title VI-B		15,000		18,000		20,000
	Insert Program Expenses Lines Here						
	Total Benefits		\$144,910		\$149,910		\$152,910
	Total Expenses		\$916,907		\$982,572		\$1,039,402
	Net Operating Income/(Loss)		\$20,074		\$24,877		\$55,863
	Beginning Fund Balance		137,768		157,842		182,719
	Ending Fund Balance		157,842		182,719		238,582

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Yr 5-7 budget w approved amend									
		Year 5		Year 6		Year 7		NOTES: School notes in plain text. PCSC Staff notes in italics.	
		Number		Number		Number			
Number of Students K		50		50		50		Year 5 add add'l 4th grade	
Number of Students 1-3		150		150		150		Year 6 add add'l 5th grade	
Number of Students 4-6		100		125		150		Year 7 add add'l 6th grade	
Number of Students 7-12									
Exceptional									
Total Number of Students		300		325		350			
Revenues:									
State Apportionment			\$970,264		\$1,059,556		\$1,142,788		
State Transportation		80%	97,128	80%	97,128	80%	97,128		
Nutrition Program			0		0		0		
Federal Grants			85,000		87,000		90,000		
Contributions/Donations			5,000		5,000		5,000		
State Revenue (IRI/LEP/Except/Voc)			8,000		8,000		8,000		
IDEA			30,000		32,000		34,000		
Lottery			15,000		16,000		17,000		
Insert Revenue Lines Here									
Total Revenues			\$1,210,392		\$1,304,684		\$1,393,916		
Expenses:									
<u>Salaries:</u>									
Teachers			11 \$372,200		12 \$404,200		13 \$436,200		
Special Ed			40,000		45,000		45,000		
Spec Ed Aide		\$ 2	0.5 14,000	\$ 2	0.5 14,000	\$ 2	0.5 14,000		
Instructional Aides- Title I		\$ 5	0.5 35,000	\$ 5	0.5 35,000	\$ 5	0.5 35,000		
Classified/Office Staff			63,000		63,000		63,000		
Administration			67,000		67,000		67,000		
Nutritional Program			0		0		0		
Librarian			0		0		0		
Custodian			7,000		7,000		7,000		
Insert Salaries Lines Here									
Total Salaries			\$598,200		\$635,200		\$667,200		
<u>Benefits:</u>									
Retirement/PERSI		11.0%	\$60,412	11.0%	\$64,482	11.0%	\$68,002		
Health/Life Insurance		325 x 12 x 12	46,800	325 x 13 x 12	42,900	325 x 14 x 12	46,800		
Payroll Taxes		8.0%	47,856	8.0%	50,820	8.0%	53,380		
Workers Compensation		1.1%	6,580	1.1%	6,990	1.1%	7,340		
Insert Benefits Lines Here									
Total Benefits			\$161,648		\$165,192		\$175,522		
<u>Operating Expenses:</u>									
Textbooks			\$6,400		\$6,400		\$6,400		
Supplies			\$10,000		\$10,000		\$10,000		
Equipment			\$2,000		\$1,500		\$1,500		
Contract Services			\$15,000		\$15,000		\$20,000		
Legal			\$2,500		\$2,500		\$2,500		
Accounting			\$0		\$0		\$0		
Advertising/Marketing			\$1,000		\$1,000		\$1,000		
Gas/Electric/Water			\$16,500		\$16,500		\$16,500		
Telephone			\$4,000		\$4,000		\$4,000		
Liability & Property Insurance			\$6,700		\$6,700		\$6,700		

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	Testing & Assessment		\$1,000		\$1,200		\$1,500
	Staff Development - Title II		\$42,500		\$43,500		\$45,000
	Membership/Fees		\$2,610		\$2,610		\$2,610
	Custodial Supplies		\$10,000		\$10,000		\$12,000
	Substitutes		\$5,000		\$5,500		\$6,000
	Mortgage		\$35,000		\$35,000		\$35,000
	Audits		\$6,000		\$6,000		\$6,000
	Grounds & Maintenance		\$8,000		\$8,000		\$8,000
	Miscellaneous						
	Insert OE Lines Here						
	Total Operating Expenses		\$174,210		\$175,410		\$184,710
	Program Expenses:						
	Transportation		\$121,410		\$121,410		\$121,410
	Nutrition Program		0		0		0
	Title I		42,500		43,500		45,000
	Title VI-B		25,000		27,000		30,000
	Insert Program Expenses Lines Here						
	Total Benefits		\$188,910		\$191,910		\$196,410
	Total Expenses		\$1,122,968		\$1,167,712		\$1,223,842
	Net Operating Income/(Loss)		\$87,424		\$136,972		\$170,074
	Beginning Fund Balance		137,768		225,192		362,164
	Ending Fund Balance		225,192		362,164		532,238

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HERITAGE ACADEMY		SECTION E - 3-Year Projection-only add separate 6th grade of 25								
3-Year Projection-only add 6th grade		Year 2012-13			Year 2013-14			Year 2014-15		
		Number	Rate	Amount	Number	Rate	Amount	Number	Rate	Amount
Number of Students		K-4 = 125	1 class EA of 25		175			175		
		5th grade 25; 6th grade 25								
Revenues:		Total 175	(8.5 units)							
State Apportionment			3,599	629,844		3,599	629,844		3,599	629,844
State Transportation			80%	71,928		80%	71,928		80%	71,928
Nutrition Program		\$ -		0	\$ -		0	\$ -		0
Federal Grants Title I-A &II-A				65,000			65,000			65,000
IDEA				15,000			15,000			15,000
Albertsons Grant										
Fundraising				3,500			3,500			3,500
ISAT remediation				1,000			1,000			1,000
IRI				200			200			200
Technology 33-1022				4,000			4,000			4,000
Lottery (actual)				6,500			6,500			6,500
Insert Revenue Lines Here										
Total Revenues				\$ 796,972			\$ 796,972			\$ 796,972
State Holdback - 5%				39,849			39,849			39,849
Total Revenues after Holdback				\$ 757,123			\$ 757,123			\$ 757,123
Expenses:										
<u>Salaries:</u>										
Teachers- 1st,3rd,4th,5/6th		\$ 31,752	6	\$190,512	\$ 31,752	6	\$190,512	\$ 31,752	6	\$190,512
2nd grade Teacher		\$ 46,200	1	\$46,200	\$ 46,200	1	\$46,200	\$ 46,200	1	\$46,200
Title I-Spec Ed Teacher		\$ 40,000	1	40,000	\$ 40,000	1	40,000	\$ 40,000	1	40,000
Spec Ed Aide - 1		\$ 7,000	,5	7,000	\$ 7,000	,5	7,000	\$ 7,000	,5	7,000
Instruct Aids/misc - Title I		\$ 7,000	3	21,000	\$ 7,000	3	21,000	\$ 7,000	3	21,000
Business Manager		\$ 45,000	1	45,000	\$ 45,000	1	45,000	\$ 45,000	1	45,000
Administration		\$ 67,000	1	67,000	\$ 67,000	1	67,000	\$ 67,000	1	67,000
Secretary		\$ 18,000	1	18,000	\$ 18,000	1	18,000	\$ 18,000	1	18,000
Custodian (maint to exp)		\$ 7,000	1	7,000	\$ 7,000	1	7,000	\$ 7,000	1	7,000
Insert Salaries Lines Here										
Total Salaries				\$441,712			\$441,712			\$441,712
<u>Benefits:</u>										

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	Retirement/PERSI	11.0%	\$ 45,508	11.0%	\$ 45,508	11.0%	\$ 45,508
	Health/Life Insurance	417 x 9	37,530	417 x 9	37,530	417 x 9	37,530
	Payroll Taxes	8.0%	35,337	8.0%	35,337	8.0%	35,337
	Workers Compensation	1.1%	4,859	1.1%	4,859	1.1%	4,859
Insert Benefits Lines Here							
	Total Benefits		\$123,234		\$123,234		\$123,234
<u>Operating Expenses:</u>							
	Textbooks		\$0		\$0		\$0
	Supplies		\$2,000		\$2,000		\$2,000
	Equipment		\$500		\$500		\$500
	Contract Srvs-copier, IT		\$15,000		\$15,000		\$15,000
	SPED Contract services		\$15,000		\$15,000		\$15,000
	Legal		\$2,500		\$2,500		\$2,500
	Prog&Financial Audit		\$6,000		\$6,000		\$6,000
	Advertising/Marketing		\$500		\$500		\$500
	Gas/Electric/Telephone		\$29,580		\$29,580		\$29,580
	Liability & Property Insurance		\$6,700		\$6,700		\$6,700
	Testing & Assessment		\$1,500		\$1,500		\$1,500
	Mortgage		\$35,000		\$35,000		\$35,000
	Permits/Fees		\$1,000		\$1,000		\$1,000
	Custodial Supplies		\$6,000		\$6,000		\$6,000
	Grounds & Maintenance		\$8,000		\$8,000		\$8,000
	Management Fees		\$0		\$0		\$0
	Prof. Dev. Title II-A		\$28,670		\$28,670		\$28,670
	Substitutes		3,000		3,000		3,000
	Memberships(ISBA,Chamber,Council,Admin)		\$1,610		\$1,610		\$1,610
Insert OE Lines Here							
	Total Operating Expenses		\$162,560		\$162,560		\$162,560
<u>Program Expenses:</u>							
	Transportation (actual)		\$89,910		\$89,910		\$89,910
	Nutrition Program	\$ -	0	\$ -	0	\$ -	0
Insert Program Expenses Lines Here							
	Total Benefits		\$89,910		\$89,910		\$89,910

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Heritage Academy Site Visit Report

January 19, 2012

Interview with Board Members:

Two board members participated in the interview. They view the mission of the school as being fulfilled but see it as an evolving process with the potential to do more. They feel the vision of the school is on target. Board members feel they function well as a board and understand their role. The strategic plan is being solidified. More training is needed. Facility concerns involve the old building and costly maintenance. Everything is in working order but repairs are commonplace due to the age of the building. They would like to see plumbing and electrical work upgraded as well as the outside structures including playground, fence, and pick up area.

Strengths of the school include having highly involved parents, diversity of the board, qualified and dedicated employees, and a common vision among all staff and the board. Areas they would like to improve include funding issues and the stress associated with starting a new school.

It seems unclear whether or not the board understands the gravity of the school's financial situation. With enrollment stabilizing at 175 and expenses remaining unchanged, the school will be operating with a loss of about \$60,000 each year. Reserves will run out in 2014-2015. Currently the board has no contingency plan for dealing with this situation. At the suggestion of PCSC staff, they are beginning to develop one which may entail reducing the administration and business manager positions to part time. The reality of reducing the two positions is questionable due to the fact that the administrator is currently filling a broad range of roles and the business manager reports working 50 hours per week.

Marketing efforts have included flyers in town, parade floats and flyers, community enrichment day, newspaper ads, and efforts to specifically reach the Hispanic population with ads and events at a local Mexican restaurant. The school plans to repeat many of these events. They view word of mouth as being the most effective marketing tool.

Interview with Administrator:

The administrator describes the school as being "a ways away" from fulfilling its mission. He believes gradual implementation of the School Wide Enrichment Model is needed with a 3-5 year time frame. They will begin mini enrichment clusters in February and continue them in May. This appears to be a violation of the school's charter which states that enrichment clusters will meet ½ day each week.

Administration considers the board to be supportive, strong, and committed. They are not micro-managing and seem to understand their role. The board chair has previous board experience and has been valuable in training other board members. The board has participated in retreats to obtain further training.

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Similar facility concerns are expressed by the administrator and the board. The administrator would like to put money into the facility to update it and make it more efficient. Maintenance issues are constant and expensive. He believes exterior work on the building and grounds would help with marketing efforts as well.

Many roles are fulfilled by the administrator. He acts as a classroom aide, computer lab instructor, special education director, EL instructor and administrator. He describes his workload as being manageable and feels he is able to handle the extra duties. The SDE has approved the administrator for alternate route special education certification.

Academic strengths of the school include IRI results, lower grades math program, and using AIMSWEB to benchmark students. Administration believes students are on track to meet the MSES outlined in the charter but with no previous data to use for comparison, this is a strictly subjective opinion. Areas needing improvement are offering more science opportunities, increasing science facilities, spending more time on history, and better meeting the needs of students in the fifth and sixth grade combination class especially in math.

Teacher evaluations are based on the Danielson model and are in progress, texts are aligned to common core standards and teachers are aware of the standards but need training for implementation. The school did not meet the pay for performance plan deadline with the SDE so it is currently based on ISAT scores by default.

Interview with Business Manager:

The business manager is on site one day per week. She reports working about 50 hours per week. The workload has gotten better. She feels she is able to get much more done from home as there are no interruptions. She has learned the 2M accounting system and ISEE reporting. Resources are available to call when help is needed.

Budget changes have included the addition of more Title I and special education aides so teachers are able to have more plan time. A special education teacher has been hired. She is on site two afternoons per week. Next year's budget allows for a part time special education teacher. The administrator is now coded as .6 administration and .4 special education. The business manager reports that the recoding has increased the school's revenue. The charter states that the school will have at least one full time trained special education coordinator on staff at all times. It appears this requirement is not being met.

The school is in the process of trying to refinance the mortgage loan. An application has been submitted to the USDA. A final decision is expected sometime this summer. The refinance would convert the 30 year 6 ½% loan of \$350,000 to a 4% 40 year loan of \$750,000. The extra money would be used to provide both interior and exterior facility upgrades. The payment would decrease from \$71,500 to \$35,000. School officials believe the school would benefit from the refinance in two ways. Payments would be lower and maintenance costs would be reduced. The scenario where the refinance is approved is reflected in budget estimates submitted in January 2012.

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An amendment to the charter requesting increasing the overall enrollment cap from 175 to 450 and adding additional grades as needed is being proposed. Without approval of the amendment and enrollment stabilizing at 175, the school estimates it will operate with a loss of about \$60,000 for the next three years. Reserves will run out in the year 2014-2015. With approval of the amendment and increased enrollment, the financial position of the school has the potential to improve dramatically. They will operate with an income each year and should have a substantial reserve built by the sixth year.

Budgets submitted with the amendment proposal depend on enrollment of 225 next year. This would entail enrolling 78 additional students while retaining all current students. Additionally, the budget proposals rely on filling the fifth and sixth grades. Each year after the first year, budget projections count on increasing enrollment by 25 students until it stabilizes at 350 in grades K-6 by year 7. The reality of reaching the proposed enrollment numbers remains questionable.

It is believed by the board and administration that the school is operating on bare bones. Therefore, it is difficult to find places where cuts could be made. There is no contingency plan in place to ensure financial stability of the school if the amendment is not approved or if the enrollment numbers are not reached.

Program Strengths:

- Dedicated staff, administration, and board
- Texts aligned to common core standards
- Teacher evaluations in process of being completed
- Board and administration have a good working relationship
- Involved parents

Program Concerns:

- Financial stability
- Administrator taking on many extra duties
- Special education multi-disciplinary team still being developed
- Unclear how fully RTI is implemented
- Inadequate data acquisition and use to drive decision making
- Missed pay for performance deadline
- Possible charter violations include:
 - Full time special education teacher not hired
 - Foreign language instruction is not offered
 - Accreditation - Heritage Academy is not accredited. This is not necessarily expected in the first year; however, the charter states the school will be accredited. School officials plan to amend the charter as only 9-12 schools are required to be accredited according to statute.
 - Curriculum cluster time requirements not being met

Possible Amendments:

- MSES
- Other possible violations as noted above
- Fix grammatical and spelling errors – no amendment needed

Recommendations:

- Find ways to cut expenses so the school operates without a loss
- Increase marketing efforts to obtain needed enrollment
- Revise MSES
- Propose needed amendments ASAP
- Implement common core standards
- Acquire data and use it to determine program effectiveness and drive decision making.

Materials requested:

- Quarterly fiscal and enrollment updates

SUBJECT

The Village Charter School Annual Update

APPLICABLE STATUTE, RULE, OR POLICY

N/A

BACKGROUND

The Village Charter School (TVCS) is a new public charter school that opened in Fall 2011. Located in Boise, TVCS provides an individualized education to students in grades K-8 using a research-based approach developed by its founders.

DISCUSSION

TVCS will provide an annual update regarding the status of the school. PCSC staff has reviewed the materials provided and makes the following observations:

TVCS currently enrolls 236 students in grades K-8 and has a waiting list for 1st grade only. Enrollment is planned to increase via the addition of one new class per year, beginning with 1st grade in Fall 2012.

IRI results indicate that 74% of K, 63% of 1st grade, 52% of 2nd grade, and 86% of 3rd grade students are reading at grade level. These results are not necessarily reflective of the TVCS program as these are fall score reports and all students were new to the school.

Current and upcoming year budgets reflect a positive fiscal outlook for the school, whose substantial reserves from the pre-opening year serve to offset a projected Year One operating loss of approximately \$20,000, leaving reserves of over \$220,000 going into Year Two.

IMPACT

Information item only.

STAFF COMMENTS AND RECOMMENDATIONS

Staff has no comments or recommendations.

COMMISSION ACTION

Any action would be at the discretion of the PCSC.

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February 9, 2012
CHARTER SCHOOL DASHBOARD

Date: 1/10/12

School Name: The Village Charter School

School Address: 219 North Roosevelt Street, Boise, ID 83706

School Phone: 208-336-2000

Current School Year: 2011-2012

School Mission: The mission of The Village Charter School is to provide a high quality free public education for our students enriching knowledge through a challenging and engaging curriculum, hands-on experience, real world application and creative methods. Each student is given the opportunity to achieve his or her full potential in a safe, supportive, loving environment preparing them for higher education, satisfying employment, and responsible citizenship. Our village includes passionate, innovative and encouraging teachers, administrators, parents and community members all working together to support our students.

CHARTER SCHOOL BOARD

Board Member Name	Office and Term	Skill Set(s)	Email	Phone
Lee Miller	Board Chairman	Finance	lealan123@aol.com	322-0116
Jani Knox	Vice-Chair	Marketing/Recruiting	jani@thevillagecharterschool.org	409-5053
Rachael Smith	Member	Grant Writing/Technology	rachael@thevillagecharterschool.org	938-7976
Jerry McBride	Member	Policy/Facility	jmac756@msn.com	861-8466
Mike Garrett	Member	Facility/Real Estate	mgarrett3@gmail.com	890-8356
Dave Lakhani	Pending Member	Entrepreneur/Business		

ENROLLMENT

Grade Level	Current Enrollment	Current ADA	Current Waiting List	Previous Year's Enrollment	Previous Year's ADA
K	42			NA	NA
1	25	54			
2	30				
3	27				
4	31				
5	26				
6	33				
7	12				
8	10				
9					
10					
11					
12					
TOTAL	236				

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Student Attrition Rate: 19 students have dropped since our first week of school, 16 new students have enrolled. Lack of transportation, relocation out of state due to job loss, Friday child care, desire to homeschool with religious texts and returning to neighborhood school for friends have been the top cited reasons for withdrawal. Enrollment numbers stable for a first year school.

Is your school planning to increase or decrease enrollment opportunities for the upcoming school year? Yes..

If yes, briefly describe planned enrollment changes, including numbers and grades affected: We are planning to increase enrollment one additional class each year beginning with grade 1 in the fall of 2012.

STUDENT DEMOGRAPHICS

School Year	Hispanic (# and %)	Asian (# and %)	White (# and %)	Black (# and %)	American Indian (# and %)	LEP (# and %)	FRL (# and %)	Special Education (# and %)
Current	19 (8%)	5 (2%)	193 (82%)	2 (less than 1%)	1 (less than 1%)	NA	Low Income Fall count: 84 (35%)	15 (6%)
Previous	* 12 (5%) students two or more races *4 (2%) students Hawaiian or Pacific Islander							

FACULTY AND STAFF

Administrator Name(s): Dr. Teresa England

Administrator's Hire Date: April 2011

Administrator Email(s): teresaengland@thevillagecharterschool.org

Current Classified Staff (# FTE): 1 @ 1.0 (office manager), 1 @ .62 (custodian), 10 @ approximately .50 and we contract with a Business Manager approximately .50

Classified Attrition Rate: 1 para professional left for a full time job. We have hired two additional paras through Medicaid to work with special needs students in the K grade level.

Current Faculty (# FTE): 10 @ 1.0 full time, 3 @ .25 (teacher specialists)

Faculty Attrition Rate: 1 teacher resigned for health reasons.

EDUCATIONAL PROGRAM

Did your school make AYP during the last school year? NA-new school in fall 2011

If no, please specify indicator and status:

If no, please describe plan for addressing need:

Was your school selected to participate in NAEP this year? no

REPORTING

Date of last programmatic operations audit? Pre-opening Audit

Date submitted to authorizer? NA

Who performed your most recent programmatic audit? Idaho Charter School Network

Date of most recent fiscal audit? NA

Date submitted to authorizer? NA

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COMMENTS

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

- Financial-loss of the Charter Start Grant
- Facility-additional cost of the portables and the city permitting process
- Lack of middle school enrollment/combo 7/8 class was not anticipated

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

One area of success would certainly be our implementation of the concept-based Singapore Math curriculum. Several activities have contributed to this success: A) The entire full time teaching staff, with the exception of one teacher who was out of the country, traveled together in July to attend a Singapore Math Conference and a Differentiation Conference. The experiences at the conference, and the opportunity to connect with other educators implementing the same curriculum were extremely valuable. We also had an opportunity to bond as a staff and had lots of great professional discussions about the math program we envisioned and how it would connect with MTI and the CCSS. B) In order to support my staff with the implementation, I partnered with Dr. Jonathan Brendefur at Boise State University to offer some ongoing professional development on our Friday collaboration and planning days. The PD allowed teachers to collaborate and create math lessons and units and share successes. We also participated in the pilot, Primary Math Assessment for grades K-2. This is a test of math sub-skills: sequencing, facts, relational thinking, interpreting context, measurement, and spatial reasoning. Teachers were able to get class reports for individual students as well as a class profile to view overall areas of strength and deficits. The PMA resources include lesson activities and games to support areas of weakness for students/classes. We are currently piloting a similar math assessment for grades 3-5. We have a Math Education Night for Parents scheduled for late January to inform parents about the program and introduce them to the concepts and activities their children are learning. C) Almost all staff have taken the state required MTI course including the school administrator. In fact, several staff members will be participating in another course opportunity in January and February. At the end of February all teachers will have completed the course.

Additionally, developing a positive school culture would be another area of success. TVCS full time staff attended a three day 7 Habits Signature and Implementation training in August. We had an opportunity to set goals and envision the kind of school culture we want to develop. We have an active School Culture Committee that includes both staff and founders. This committee has helped facilitate the implementation of both our ACE Approach (Accountability, Consideration of others, and Equipping for the Future) and the 7 Habits/Leader in Me. We have consistent, school-wide expectations for students and our discipline approach focuses on reflection and education. We recently included our teacher specialists and paraprofessionals in a school culture training and plan to include the entire staff in our follow up training scheduled for June 11 and 12. This training will include establishing our Lighthouse Teams and setting goals for the upcoming 2012 school year. Additionally, our school board members take part in governance training each month and have had an initial 7 Habits Culture training.

Finally, our Elective Program has been a huge success. Each Thursday afternoon, our students participate in elective classes. We offer 8 different classes at a time. Session lengths vary between 4 and 8 weeks. Students choose which class they are interested in and we divide into multi-age groupings: 1st-2nd have two class options, 3rd-5th grade have 3 class options, and 6th-8th have 3 class options. The goal of our Elective Program is for all students to find success by learning about something that interests them in a fun, hands-on, and meaningful way. Our classroom teachers each oversee an elective but the instruction is provided by by Mentor volunteers. Our Mentors range from professionals in the field to hobbyists to retirees. The entire program is run by volunteers and we estimate that over 1,000 hours were donated this fall to support our elective program. We do not charge any fees for elective classes and all class supplies are paid for through fundraising and by donations. So far this year we have held one fundraiser and raised over \$2500 for the elective program. For the first session we offered Chefs in Training, Lego: Simple Machines, Drama & Improvisation, Bird by Bird, Drawing for Fun, Motion Pictures, Fine Art, and Computer Programming. For this next session, we are adding 5 new electives including Book Creating, Crime Scene Investigation, Robotics, American Sign Language, Jewelry Making and Vision Boards.

Please describe any challenges you anticipate during the upcoming year:

- Implementing the Common Core State Standards-securing the necessary professional development and funding

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- Expanding our use of Infinite Campus to include the grade book and a standards based report card/Ongoing work to become more data driven
- Financial-Fundraising will be a priority for the school board and PTO
- Growing our School Board to target specific skill sets we identify as needs

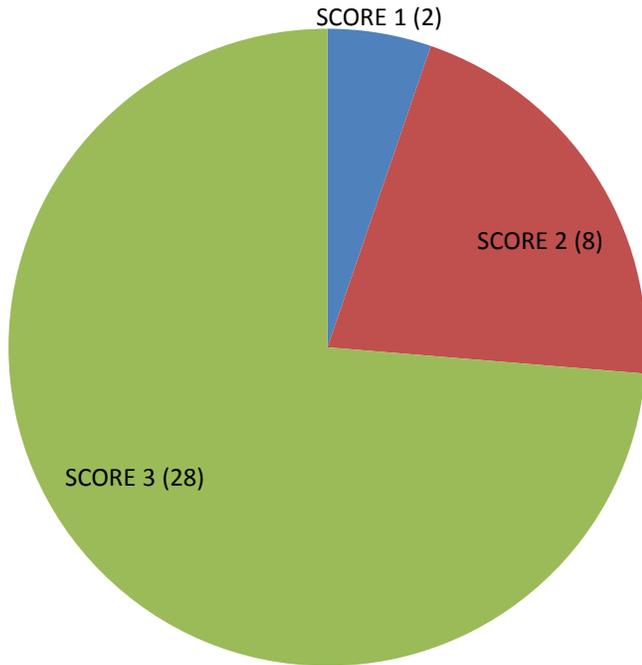
Please add any additional information of which you would like to make your authorizer aware :

We are a new school that has only been open for 4 months. We have IRI scores, but do not yet have ISAT results to share. However, we recently received the prior year ISAT scores for our students. Reading and Math ISAT scores are strong, and Language Arts scores are a bit weaker. It's too soon in the school year to have a goals attainment report but we have been piloting various assessment tools such as AIMSweb Curriculum Based measures for math concepts and applications and fluency. We are in the process of implementing a school-wide assessment for reading error rate, self-correction rate, and comprehension. We have learned from our two CBM assessments that we need to do some additional practice and timing with our students so they are more familiar with both test taking strategies and the timing aspect which is quite different from their daily math and reading course experiences. Our students are showing growth, especially in the middle school grades on the concepts and applications math CBM, but we need more data to draw stronger conclusions. IRI scores are attached. We have a report card we are piloting this year, but know that it will need to be adapted to meet the new Common Core State Standards and this work will be done over the summer. A survey to include parent input on our teacher and principal evaluation is in progress. Exit interview data has been collected via phone calls and email this year. Next year we will look into hiring a third party to conduct our exit interviews.

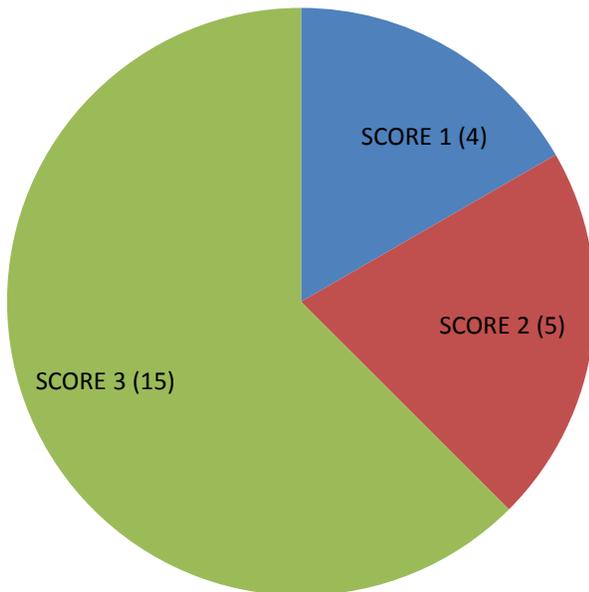
REQUIRED ATTACHMENTS

- 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
- Exit interview data for most recent school year

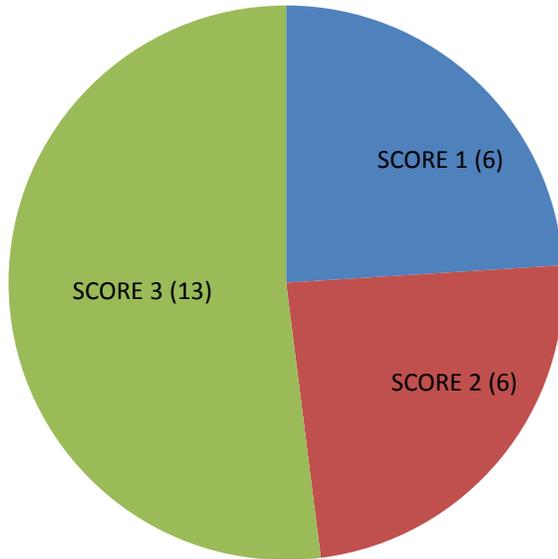
Kindergarten IRI Scores



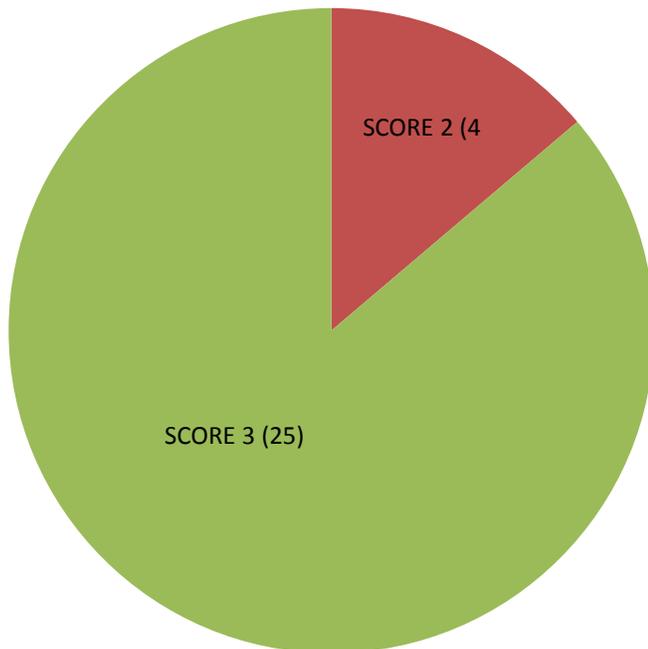
Grade 1 IRI Scores



Grade 2 IRI Scores



Grade 3 IRI Scores



The Village Charter School January 11, 2012	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
REVENUE							
Salary Apportionment	\$604,869.84	\$508,784.00	\$508,784.00	84.11%			
Benefit Apportionment	\$96,847.00	\$0.00	\$87,029.00	0.00%			
Entitlement	\$272,801.40	\$113,255.00	\$229,624.00	41.52%	Original budget based on 274. Current enrollment based on 229 ADA		
State Transportation	\$0.00	\$0.00	\$0.00	#DIV/0!			
Lottery	\$0.00	\$0.00	\$0.00	#DIV/0!			
Other State Funds (Specify)	\$0.00	\$0.00	\$0.00	#DIV/0!			
Special Ed - Regular	\$0.00	\$0.00	\$26,593.00	#DIV/0!			
Special Ed - ARRA	\$0.00	\$0.00	\$0.00	#DIV/0!			
Title I	\$0.00	\$0.00	\$0.00	#DIV/0!			
Federal Title I Funds : ARRA	\$0.00	\$0.00	\$0.00	#DIV/0!			
Medicaid Reimbursement	\$0.00	\$358.00	\$3,000.00	#DIV/0!			
Title IIA	\$0.00	\$0.00	\$17,570.00	#DIV/0!			
Local Revenue (Specify)	\$243,363.00	\$0.00	\$243,363.00	0.00%	Remaining Albertson Grant carried over. <i>State Comparison column moves this sum to the appropriate "carryover from previous FY" line below.</i>		
Federal Startup Grant	\$258,363.00	\$172,935.00	\$172,935.00	66.93%			
Other Grants (Specify)	\$8,299.00	\$3,633.00	\$7,266.00	43.78%	Technology grant		
Fundraising	\$0.00	\$3,811.00	\$5,000.00	#DIV/0!			
Interest Earned	\$1,000.00	\$332.00	\$1,000.00	33.20%			
Other (Specify)	\$0.00	\$8,400.00	\$8,400.00	#DIV/0!	Supply fees		
Other (Specify)	\$0.00	\$0.00	\$0.00	#DIV/0!			
TOTAL REVENUE	\$1,485,543.24	\$811,508.00	\$1,310,564.00	54.63%			\$1,067,201.00
EXPENDITURES							
100 Salaries							
Teachers	\$344,388.00	\$93,787.00	\$283,236.00	27.23%			
Special Education	\$40,000.00	\$13,333.00	\$40,000.00	33.33%			
Instructional Aides	\$50,680.00	\$21,119.00	\$50,680.00	41.67%			
Classified/Office	\$18,528.00	\$9,656.00	\$19,488.00	52.12%			
Administration	\$68,250.00	\$32,500.00	\$68,250.00	47.62%			
Maintenance	\$15,000.00	\$5,780.00	\$15,000.00	38.53%			
Other (Specify)	\$0.00	\$0.00	\$0.00	#DIV/0!			
Other (Specify)	\$0.00	\$0.00	\$0.00	#DIV/0!			
Total Salaries	\$536,846.00	\$176,175.00	\$476,654.00	32.82%			\$476,654.00
200 Employee Benefits							
PERSI/FICA/Benefits	\$165,640.00	\$52,062.00	\$124,596.00	31.43%			
Other (Specify)	\$10,780.00	\$3,733.00	\$3,733.00	34.63%	Worker's Compensation		
Total Benefits	\$176,420.00	\$55,795.00	\$128,329.00	31.63%			\$128,329.00
300 Purchased Services							
Management Services	\$0.00	\$0.00	\$0.00	#DIV/0!			
Staff Dev/Title IIA	\$0.00	\$2,060.00	\$10,000.00	#DIV/0!			
Legal Pub/Advertising	\$6,000.00	\$1,000.00	\$5,000.00	16.67%			
Legal Services	\$6,000.00	\$2,400.00	\$6,000.00	40.00%			
Special Education	\$40,000.00	\$5,135.00	\$20,000.00	12.84%			
Liability & Property Ins	\$7,070.00	\$7,650.00	\$7,650.00	108.20%			
Substitute Teachers	\$0.00	\$920.00	\$500.00	#DIV/0!	Included in Salary allocation		
Board Expenses	\$7,500.00	\$0.00	\$0.00	0.00%	Audit Fees allocated to FY13		
Computer Services	\$3,500.00	\$3,149.00	\$5,900.00	89.97%			
Transportation	\$0.00	\$0.00	\$0.00	#DIV/0!			
Travel	\$2,000.00	\$0.00	\$2,000.00	0.00%			
Other (Specify)	\$22,500.00	\$7,500.00	\$25,000.00	33.33%	Business Mgr Svcs		
Other (Specify)	\$1,200.00	\$1,170.00	\$1,200.00	97.50%			
Total Services	\$95,770.00	\$30,984.00	\$83,250.00	32.35%			\$83,250.00
Facilities				#DIV/0!			

Building Lease	\$48,000.00	\$40,000.00	\$58,000.00	5.00%		
Land Lease	\$0.00	\$0.00	\$0.00	#DIV/0!		
Modular Lease	\$32,800.00	\$20,915.00	\$26,000.00	63.77%		
Utilities, Phones, Lndscp	\$12,000.00	\$5,873.00	\$16,800.00	7.67%		
Site Preparation	\$35,200.00	\$31,498.00	\$32,000.00	0.00%	Grounds and Site preparation-portables and building	
Other (Specify)	\$0.00	\$2,929.00	\$5,202.00	#DIV/0!	Rental of office equipment/HVCA maintenance	
Other (Specify)	\$0.00	\$495.00	\$1,872.00	#DIV/0!	Security monitoring service	
Total Facilities	\$128,000.00	\$101,710.00	\$139,874.00	79.46%		\$139,874.00
400 Supplies and Maintenance						
Textbooks	\$5,500.00	\$1,000.00	\$0.00	18.18%	Paid from the Federal Startup grant	
School Supplies	\$15,000.00	\$4,197.00	\$16,500.00	27.98%	Elementary Supplies/fundraising/curriculum supplies	
Power School	\$0.00		\$0.00	#DIV/0!	Paid from the Federal Startup grant \$8,250 - Infinite Campus	
Custodial Supplies	\$1,000.00	\$913.00	\$1,000.00	91.30%		
Other (Specify)	\$6,000.00	\$3,775.00	\$6,000.00	62.92%	Building/Grounds Maintenance	
Other (Specify)	\$1,650.00	\$4,533.00	\$7,750.00	274.73%	Bus Operations Supplies/2M software licensing	
Total Supplies	\$29,150.00	\$14,418.00	\$31,250.00	49.46%		\$31,250.00
500 Capital Objects						
Furniture	\$0.00	\$0.00	\$0.00	#DIV/0!	Purchased through Federal Startup Grant	
Technical AV Equipment	\$8,299.00	\$3,633.00	\$7,266.00	43.78%		
Other (Specify)	\$5,000.00	\$3,473.00	\$3,500.00	69.46%	Building Equipment - Phone System/Security sensors	
Other (Specify)			\$0.00	#DIV/0!		
Other (Specify)			\$0.00	#DIV/0!		
Other (Specify)			\$0.00	#DIV/0!		
Total Capital Objects	\$13,299.00	\$7,106.00	\$10,766.00	53.43%		\$10,766.00
Debt Service						
Specify	\$0.00	\$0.00	\$0.00	#DIV/0!		
Specify	\$0.00	\$0.00	\$0.00	#DIV/0!		
Specify	\$0.00	\$0.00	\$0.00	#DIV/0!		
Total Debt Service	\$0.00	\$0.00	\$0.00	#DIV/0!		\$0.00
Grant Purchases					Federal Startup Grant final allocation purchases.	
Specify	\$51,870.00	\$58,551.00	\$58,551.00	112.88%	Purchased Services	
Specify	\$87,257.00	\$67,925.00	\$67,925.00	77.84%	Supplies	
Specify	\$118,873.00	\$47,028.00	\$47,028.00	39.56%	Equipment	
Specify	\$243,363.00	\$45,131.00	\$45,131.00	18.54%	Albertson Grant	
Specify	\$0.00	\$0.00	\$0.00	#DIV/0!		
Total Grant Purchases	\$501,363.00	\$218,635.00	\$218,635.00	43.61%		\$218,635.00
Reserve Fund	\$0.00	\$0.00	\$198,232.00	#DIV/0!	State comparison column shows reserve in bottom line.	\$0.00
Building Fund	\$0.00	\$0.00	\$0.00	#DIV/0!		
Total Expenses	\$1,480,848.00	\$604,823.00	\$1,286,990.00	40.84%		\$1,088,758.00
Carryover from Previous FY	\$0.00	\$0.00	\$0.00	#DIV/0!		\$243,363.00
Reserve/(Deficit)	\$4,695.24	\$206,685.00	\$23,574.00	4402.01%		\$221,806.00

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<u>The Village Charter School</u> <u>January 11, 2012</u>	Proposed Budget	Notes	
REVENUE			
Local Revenue	\$0.00		
State Revenue			
Entitlement	\$332,315.40	Enrollment of 325 students: 50 K, 1st-3rd 110, 4th-6th 99, 7/8 66; Lottery occurring in April 2012.	
Wages			
Administration	\$52,321.00		
Teachers	\$538,151.00	Hiring one additional teacher for First Grade.	
Classified	\$114,366.00		
Medicaid	\$5,000.00		
Benefit	\$98,805.00		
Transportation	\$0.00		
Federal Revenue			
Title I	\$0.00		
Special Ed	\$26,593.00		
Title II	\$17,570.00		
Startup Grant	\$0.00		
Other Sources (Specify)	\$7,266.00	Technology Grant	
Other Sources (Specify)	\$1,000.00	Interest	
Other Sources (Specify)	\$5,000.00	Fundraising	
Total Revenue before holdback	\$1,198,387.40		
PROPOSED HOLDBACK			
		Holdbacks should be estimated at a minimum of 5% - 5.5% for FY 2011.	
Teacher Salaries	\$26,907.55		
Classified Salaries	\$5,718.30		
Admin Salaries	\$2,616.05		
Benefits	\$4,940.25		
Entitlement	\$16,615.77		
Transportation	\$0.00		
Total Holdback	\$56,797.92		
Total Revenue after holdback	\$1,141,589.48		
EXPENDITURES			
100 Salaries			
Teachers	\$313,236.00		
Admin	\$68,250.00		
Classified	\$70,168.00	Includes Instructional aides	
Special education	\$40,000.00		
Other (Specify)	\$15,000.00	Maintenance	
Other (Specify)	\$13,679.22	3% salary adjustment	
Total Salaries	\$520,333.22		
200 Benefits			
Benefit Dollars	0		
PERSI/Payroll taxes	\$142,596.00		
Other (Specify)	\$11,103.40	3% increase in benefits	
Total Benefits	\$153,699.40		
300 Purchased Services			
Transportation	\$2,000.00	Field trips	
Special Education	\$30,000.00		
Proctor costs	\$1,000.00		
Legal	\$7,200.00		
Insurance	\$7,650.00		
Copier Lease	\$6,502.50		
Printer Lease	\$0.00		
Facility Lease	\$80,000.00	Includes portable lease and new third portable w/setup costs	
Utilities	\$16,800.00		1324
Professional Development	\$17,000.00		
Technology	\$5,900.00	Computer/Server maintenance	
Management Services	\$30,000.00	Bus Mgr Svcs	
Legal Publications/Advertising	\$7,000.00		

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Substitute Teachers	\$0.00	Included in Salary allocation	
Board Expenses	\$7,930.00	Audit/990 services	
Other (Specify)	\$3,000.00	Franklin Covey/Infinite Campus License fees	
Other (Specify)	\$0.00		
Total Purchased Services	\$221,982.50		
Supplies & Materials			
Teacher/Classroom	\$15,000.00		
Office	\$5,000.00		
Janitorial	\$2,000.00		
Textbooks	\$10,000.00		
Other (Specify)	\$6,000.00	Bldg/Grounds supplies	
Other (Specify)	\$7,266.00	Classroom technology expenses	
Total Supplies & Materials	\$45,266.00		
Grant Expenditures			
Specify	\$0.00		
Specify	\$0.00		
Specify	\$0.00		
Total Grant Expenditures	\$0.00		
Capital Outlay	\$0.00		
Total Capital Outlay	\$0.00		
Debt Retirement	\$0.00		
Total Debt Retirement	\$0.00		
Insurance & Judgements	\$7,650.00		
Total Insurance & Judgements	\$7,650.00		
Transfers			
Total Transfers	\$0.00		
Contingency Reserve	\$56,800.00		
Building Fund	\$50,000.00		
Total Expenditures	\$1,055,731.12		
Carryover from Previous FY	\$23,574.00	Reflects projected reserve/(deficit) from "current year" worksheet	
Reserve/(Deficit)	\$109,432.36		

SUBJECT

Legacy Charter School Annual Update

APPLICABLE STATUTE, RULE, OR POLICY

IDAPA 08.02.04.301.01

I.C. 33-1510

I.C. 33-5209(2)

BACKGROUND

Legacy Charter School (Legacy) is a new public charter school that opened in Fall 2011. Located in Nampa, Legacy provides to students in grades K-8 a Harbor Method education option duplicating the program used successfully at Liberty Charter School and Victory Charter School.

DISCUSSION

Legacy will provide an update on the status of the school. PCSC staff has visited the school, reviewed the materials submitted, and makes the following observations:

Legacy currently enrolls 245 students and has 244 students on its waiting list.

The school has broken ground for a new, permanent facility. The anticipated completion date is fall 2012. The school has secured a bank loan with favorable terms.

Fall IRI scores indicate that 63% of kindergarten, 59% of 1st grade, 77% of 2nd grade, and 79% of 3rd grade students are reading at grade level. However, these results do not necessarily reflect Legacy's program as all students are new to the school this year.

Due to unforeseen startup expenses, Legacy anticipates a year-end deficit of approximately \$75,000 for FY12. Estimated FY13 budgets, which rely on a small enrollment increase, project a small but positive fund balance by the end of that year. Additional budget projections indicate that each subsequent year will end with operating income, resulting in a reserve of approximately \$521,000 by the end of year 5.

Legacy appears to have violated the law and the terms of its charter by failing to obtain bids for student transportation services. Legacy's charter states that "In providing transportation services, Legacy will comply with Idaho Code 33-402(2) and 33-1510." The State Department of Education is investigating Legacy's compliance with I.C. 33-1510(2), which requires schools to advertise, bid, and contract for all bus transportation services.

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No documentation exists demonstrating the bidding process used by Legacy to secure transportation services.

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:...(a) Committed a material violation of any condition, standard or procedure set forth in the approved charter...(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...or (f) Violated any provision of law.”

STAFF COMMENTS AND RECOMMENDATIONS

Staff recommends that the PCSC direct staff to issue to Legacy Charter School a notice of defect on the grounds of material violation of a condition, standard, or procedure set forth in the approved charter, specifically, Tab 8, Transportation, and violation of a provision of law, specifically, Idaho Code 33-1510.

Staff further recommends that the PCSC consider whether Legacy Charter School has failed to demonstrate fiscal soundness as defined by I.C. 33-5209(2)(d).

COMMISSION ACTION

A motion to direct staff to issue to Legacy Charter School a notice of defect on the grounds of material violation of a condition, standard, or procedure set forth in the approved charter, specifically, Tab 8, Transportation and violation of a provision of law, specifically, I.C. 33-1510(2).

AND/OR

A motion to direct staff to issue to Legacy 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 _____

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CHARTER SCHOOL DASHBOARD

Date: 1/9/12

School Name: Legacy Public Charter School

School Address: 4015 S. Legacy Way, Nampa, Idaho 83686

School Phone: 208-467-0947

Current School Year: 2011-2012

School Mission: Legacy's mission is to develop students who are competent, confident, productive and responsible young adults who possess the habits, skills and attitudes to succeed in high school and to be offered the invitation of a post-secondary education, satisfying employment, and life-long opportunities

CHARTER SCHOOL BOARD

Board Member Name	Office and Term	Skill Set(s)	Email	Phone
Bart McKnight	Chairman	Business, Harbor founder & former Harbor school board member, 2014	bmcknight.legacycharterschool@gmail.com	208-989-3296
Shelia Bryant	Vice Chair	Legal, Harbor founder & Harbor school board member 2013	sbryant.legacycharterschool@gmail.com	208-880-7499
Christine Ivie	Member	Education, Parent 2012	civie.legacycharterschool@gmail.com	208-871-7749
Emily Criddle	Secretary/Treasurer	Parent, Volunteer 2013	ecriddle.legacycharterschool@gmail.com	208-466-2737
Open	To be filled in 2012	2015		
Niki Crow	Clerk	Financial	nikicrow@msn.com	208-571-2936

ENROLLMENT

Grade Level	Current Enrollment	Current ADA	Current Waiting List	Previous Year's Enrollment	Previous Year's ADA
K	25	98.3	91	NA	NA
1	28	97.3	72	NA	NA
2	30	97.75	33	NA	NA
3	30	98.21	0	NA	NA
4	33	98.22	20	NA	NA
5	33	98.98	27	NA	NA

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6	33	97.25	0	NA	NA
7	16	97.93	1	NA	NA
8	17	96.67	0	NA	NA
9				NA	NA
10				NA	NA
11				NA	NA
12					
TOTAL	245	97.84	244		

Student Attrition Rate: 8% - have filled all open seats immediately from wait list - therefore, school has remained full.
Is your school planning to increase or decrease enrollment opportunities for the upcoming school year? Increase.
If yes, briefly describe planned enrollment changes, including numbers and grades affected: Move to full, separate 7th & 8th grade classes (combined this current year). However, if numbers don't warrant it, we will continue with combined 7th/8th grade until 2013-2014 school year.

STUDENT DEMOGRAPHICS

School Year	Hispanic (# and %)	Asian (# and %)	White (# and %)	Black (# and %)	American Indian (# and %)	LEP (# and %)	FRL (# and %)	Special Education (# and %)
Current	18/7.3%	12/4.9%	214/87%	2/.8%	0/0%	0	90/41%	17/7%
Previous								

FACULTY AND STAFF

Administrator Name(s): Monika Gangwer and Seth Stallcop
Administrator's Hire Date: 7-1-2011
Administrator Email(s): legacyharborschooladm@gmail.com
Current Classified Staff (# FTE): 6
Classified Attrition Rate: 0
Current Faculty (# FTE): 10.5
Faculty Attrition Rate: 0

EDUCATIONAL PROGRAM

Did your school make AYP during the last school year? N/A - in first year of operation
If no, please specify indicator and status: NA
If no, please describe plan for addressing need: NA
Was your school selected to participate in NAEP this year? No

REPORTING

Date of last programmatic operations audit? 6/27/2011
Date submitted to authorizer? Jan. 11, 2011
Who performed your most recent programmatic audit? Idaho Charter School Network
Date of most recent fiscal audit?
Date submitted to authorizer?

COMMENTS

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

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Legacy broke ground on its permanent facility just this week (Jan. 9) . We are excited that we are on schedule with this next milestone in the school's operations. Anticipated completion is fall 2012.

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

1. Opening on time and with a full enrollment & waiting list.
2. High parent and student satisfaction (annual survey to be distributed spring 2012).
4. Recognizing early during enrollment process and screening, a higher than expected number of students for Special Education/RTI/IEP services and having those in place within first two days of schools or before. (Also, having outlined and in place the three-tier process for RTI prior to school opening.)
5. Teaching staff on board and well trained early on to immediately build Harbor culture and academic program.
6. Hiring of a founding Harbor School Method teacher to serve as a teacher-in-residence, along with three other Harbor School teachers -- these individuals have created strong mentoring relationships with teachers and classified staff, and have done much to model to students and parents the culture & expectations of the school. As a result, all direct constituents of the school are receiving the benefits of their knowledge on a day-to-day basis.

Please describe any challenges you anticipate during the upcoming year:

1. We will be building our facility while we are in school. Which, while exciting, could provide some challenges. However, we are already communicating with our parents and students to help ensure safety around the school site and construction area and to build excitement in the community about the project.
2. While we had primarily built the budgets without relying on the Charter Start-up Grant funds for years 2 & 3 (this year and next), the absence of those funds has created a tougher recovery from some unforeseen expenses that will result in a deficit for this year. In year 2 of operations we will quickly come out of that deficit, and by year 3 will have a healthy fund reserve. But even with the deficit, we were able to secure a bank loan (with favorable terms and that fit within our strict budget model) because of the bank's confidence in the Harbor School Founder's (Rebecca Stallcop) successful long-time financial structure in place at Liberty Charter School, and at its replicated school, Victory, and our commitment to following the same.

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

1. Co-administrators appreciate the founders' foresight and the Governing Board's support of creating a formal, working relationship with the Harbor Founder to ensure compliance with the Harbor School Method. This relationship has made the replication of Liberty Charter School, the founding Harbor Method School, much easier.
2. We're learning this year that just because you're replicating a successful educational model that, in our community, has resulted in the other two Harbor schools having massive waiting lists (each has over 1,700 students), that doesn't immediately translate into a large waiting list for us. While our waiting list is strong enough to have handled any attrition, we're seeing that parents are having perhaps a "wait-and-see" attitude, dependent mostly on seeing the permanent building construction begin. As a result, with the construction beginning this week (Jan. 9) and coupling that with a renewed communications/marketing effort for the school and its lottery, we are hoping to see the waiting list at least double by year's end. As we are one of the few, recent schools to replicate in the same community, this may be a cautionary tale to share with others.

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.

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- 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
- Exit interview data for most recent school year

Legacy Public Charter School Annual Update

Most recent ISAT, IRI, DWA, DMA results

The only formal state testing to occur since Legacy’s opening has been the fall IRI (results included in chart below). However, Legacy co-administrators, teachers and special education director developed at the school’s onset a series of on-going strategies to evaluate and re-evaluate their students’ academic achievement and gaps in achievement in order to respond accordingly in day-to-day learning, specials, Title IA services, RTI, etc. These included:

1. Review of all student records as they were received from students’ previous schools. Contact made w/parents, former teachers/special education directors, as appropriate. Students needing to be placed on IEPs were completed within two days of the school opening.
2. Weekly math concept tests.
3. Weekly reading, language, spelling comprehension tests.
4. While the DMA and DWA are no longer required by the State, Legacy has scheduled these tests to be conducted the week of Jan. 16.
5. Aimsweb probes are being administered schoolwide three times per year to help identify students that are below grade level and need to be monitored with RTI.
6. Offering an extended reading program for K-3 students that scored a 1 on the IRI. The program will run from February to May.

Legacy Public Charter School
IRI Fall 2011 Test Data

2011-2012	Benchmark	Strategic	Intensive
K-Fall	63.64%	27.27	9.09%
K-Spr	NA	NA	NA
1st-Fall	59.14%	32.14%	10.71%
1st-Spr	NA	NA	NA
2nd-Fall	76.67%	13.33%	10%
2nd-Spr	NA	NA	NA
3rd-Fall	78.57%	17.86%	3.57%
3rd-Spr	NA	NA	NA

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Response to most recent Programmatic Audit:

Legacy's programmatic audit was conducted by the Idaho Charter School Network on June 27, 2011, approximately six weeks prior to the school's first day of classes. As a result, many of the audit team's observations and/or recommendations appeared to be common for schools in the pre-opening phase. What we most appreciated about the audit was the team being "*...very encouraged by the replication of a successful model that has been tested by time, builds on the collective wisdom and experience of successful charter professionals, and brings to the new school some of the most skilled teachers and leaders from existing schools.*" Successful replication of Liberty Charter School and adherence to the Harbor Method founder's educational model is our #1 goal. Therefore, recognition of this occurring during the start-up phase, while ensuring that all the myriad policies, procedures, programs, plans, approvals, and reporting were in place or in process gave us great confidence going into this initial year.

As a result of the programmatic audit team's scores and comments coming mostly from the start-up processes occurring in the final 6-8 weeks of prior to opening, our responses to the review are such:

1. Facilities – All sections as listed in the report are "Complete."
2. Health and Safety – All sections listed in the report are "Complete."
3. Contracted Services – All sections listed in the report are "Complete."
4. Policies and Procedures – All sections listed are "Complete." Additionally, the governing board is following the ISBA recommendation to review on a rotational basis within their board calendar policies and procedures. As a result, the governing board will be in the continual process of review and updating as necessary. Also, while the personnel handbook remains "in process," the series of personnel policies and procedures, which serve as the basis for a handbook, have been adopted by the Board and should be in handbook form by the end of January 2012.
5. Documentation – All sections listed in the report are "Complete." With the hiring of an experienced accountant/bookkeeper and clerk of the board, with significant experience in developing and working with Harbor budgets and Harbor governing boards, the Documentation, Finance, and Governance reporting areas noted in the report have been resolved. Additionally, the hiring of a special education director who works in other Harbor schools, helped ensure immediate & proper identification of services for students needing them, as well as appropriate student file creation.
6. Finance -- All sections listed in the report are "Complete."
7. Personnel -- All sections listed in the report are "Complete." Two teachers did require plans plan for obtaining HQT at the middle school level even though Legacy uses a K-8, self-contained elementary school model. The teachers' HQT plans were in place and approved by the SDE prior to school beginning. Use of the paraprofessionals, also cited in the audit as possibly needing revision, have been run past the SDE and are approved.
8. Governance -- All sections listed in the report are "Complete."
9. Educational Program -- All sections listed in the report are "Complete."
10. General -- All sections listed in the report are "Complete." (Annual review of the charter, cited as "Not Yet," complete, will be conducted at a year-end board meeting.)

Legacy Charter School January 11, 2012	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
REVENUE		11/30/2011					
Salary Apportionment	\$626,808.00	\$618,768.00	\$618,768.00	98.72%			
Benefit Apportionment	\$110,775.00		\$130,000.00	0.00%			
Entitlement	\$250,232.00	\$149,865.00	\$250,232.00	59.89%	Based on enrollment of 243. 12.76 Support Units.		
State Transportation	\$66,000.00		\$60,000.00	0.00%			
Lottery				#DIV/0!			
Other State Funds (Specify)		\$3,617.50	\$6,800.00	#DIV/0!	Technology, IRI, Gifted & Talented		
Special Ed - Regular	\$50,000.00		\$24,000.00	0.00%	Funding reduced from original estimates.		
Special Ed - ARRA				#DIV/0!			
Title I	\$57,461.00	\$7,652.16	\$45,000.00	13.32%	Funding reduced from original estimates.		
Federal Title I Funds : ARRA				#DIV/0!			
Medicaid Reimbursement				#DIV/0!			
Title IIA	\$28,166.00		\$23,000.00	0.00%	Funding reduced from original estimates.		
Local Revenue (Specify)	\$25,000.00			0.00%	Albertson's - All funds received last year.		
Federal Startup Grant	\$227,572.00	\$25,000.00	\$25,000.00	10.99%	Idaho didn't receive Startup Funding this year.		
Other Grants (Specify)				#DIV/0!			
Fundraising				#DIV/0!			
Interest Earned	\$300.00	\$28.56	\$100.00	9.52%			
Other (Specify)		\$65.00	\$65.00	#DIV/0!	Misc.		
Other (Specify)				#DIV/0!			
TOTAL REVENUE	\$1,442,314.00	\$804,996.22	\$1,182,965.00	55.81%		\$0.00	
EXPENDITURES							
100 Salaries							
Teachers	\$415,340.00	\$135,886.95	\$435,000.00	32.72%			
Special Education	\$35,000.00	\$11,645.82	\$30,000.00	33.27%			
Instructional Aides	\$115,000.00	\$43,182.89	\$95,000.00	37.55%			
Classified/Office	\$25,000.00	\$10,416.65	\$25,000.00	41.67%			
Administration	\$75,000.00	\$34,244.15	\$80,000.00	45.66%			
Maintenance	\$5,000.00	\$757.50	\$2,500.00	15.15%			
Other (Specify)				#DIV/0!			
Other (Specify)				#DIV/0!			
Total Salaries	\$670,340.00	\$236,133.96	\$667,500.00	35.23%			
200 Employee Benefits							
PERSI/FICA/Benefits	\$179,361.00	\$61,219.47	\$165,000.00	34.13%			
Other (Specify)	\$8,000.00	\$3,655.00	\$3,655.00	45.69%	Worker's Comp		
Total Benefits	\$187,361.00	\$64,874.47	\$168,655.00	34.63%			
300 Purchased Services							
Management Services				#DIV/0!			
Staff Dev/Title IIA	\$28,166.00	\$310.98	\$23,000.00	1.10%			
Legal Pub/Advertising	\$1,500.00	\$94.66	\$500.00	6.31%			
Legal Services				#DIV/0!			
Special Education	\$17,000.00	\$2,814.59	\$8,000.00	16.56%	We will be receiving Medicaid Reimbursements, but don't know how much that will be at this time		
Liability & Property Ins	\$10,000.00	\$6,743.00	\$6,743.00	67.43%			
Substitute Teachers	\$3,000.00	\$438.00	\$1,500.00	14.60%			
Board Expenses	\$5,000.00	\$3,300.00	\$5,000.00	66.00%	Audit		
Computer Services				#DIV/0!			
Transportation	\$88,000.00	\$24,332.56	\$80,000.00	27.65%			
Travel				#DIV/0!			
Other (Specify)	\$10,000.00	\$2,020.00	\$6,000.00	20.20%	Copier Lease		
Other (Specify)	\$75.00	\$1,555.84	\$2,000.00	2074.45%	Bank Service Charges, Dues & Fees		
Total Services	\$162,741.00	\$41,609.63	\$132,743.00	25.57%		\$0.00	
Facilities				#DIV/0!			
Building Lease				#DIV/0!			

Land Lease				#DIV/0!		
Modular Lease	\$72,000.00	\$61,720.45	\$91,000.00	85.72%		
Utilities, Phones, Lndscp	\$21,500.00	\$2,611.29	\$17,600.00	2.04%		
Site Preparation		\$153,030.74	\$153,030.74	#DIV/0!		
Other (Specify)				#DIV/0!		
Other (Specify)				#DIV/0!		
Total Facilities	\$93,500.00	\$217,362.48	\$261,630.74	232.47%		\$0.00
400 Supplies and Maintenance						
Textbooks				#DIV/0!		
School Supplies			\$0.00	#VALUE!	Textbooks & supplies purchased with Startup Grant last year and this year.	
Power School				#DIV/0!		
Custodial Supplies			\$0.00	#VALUE!		
Other (Specify)	\$4,000.00	\$133.66	\$750.00	3.34%	Grounds	
Other (Specify)		\$225.00	\$750.00	#DIV/0!	Building Maintenance	
Total Supplies	\$4,000.00	\$358.66	\$1,500.00	8.97%		\$0.00
500 Capital Objects						
Furniture				#DIV/0!		
Technical AV Equipment				#DIV/0!		
Other (Specify)				#DIV/0!		
Other (Specify)				#DIV/0!		
Other (Specify)				#DIV/0!		
Other (Specify)				#DIV/0!		
Total Capital Objects	\$0.00	\$0.00	\$0.00	#DIV/0!		\$0.00
Debt Service						
Specify				#DIV/0!		
Specify				#DIV/0!		
Specify				#DIV/0!		
Total Debt Service	\$0.00	\$0.00	\$0.00	#DIV/0!		\$0.00
Grant Purchases						
Specify	\$227,572.00	\$25,000.00	\$25,000.00	10.99%	Startup Expenses	
Specify	\$5,000.00		\$0.00	0.00%	Title I Supplies	
Specify	\$25,000.00	\$39,158.51	\$39,158.51	156.63%	Albertson's Supplies & Purchased Services	
Specify		\$574.45	\$574.45	#DIV/0!	Title VI-B Supplies	
Specify				#DIV/0!		
Total Grant Purchases	\$257,572.00	\$64,732.96	\$64,732.96	25.13%		\$0.00
Reserve Fund				#DIV/0!		
Building Fund				#DIV/0!		
Total Expenses	\$1,375,514.00	\$625,072.16	\$1,296,761.70	45.44%		
Carryover from Previous FY	\$0.00	\$0.00	\$39,159.00	#DIV/0!		\$0.00
Reserve/(Deficit)	\$66,800.00	\$179,924.06	(\$74,637.70)	269.35%		

Legacy Charter School January 11, 2012	Proposed Budget	Notes	Difference from "Current Fiscal Year"	
REVENUE				
Local Revenue			\$0.00	reflects projected from "current FY"
State Revenue				
Entitlement	\$278,296.68	Based on enrollemnt of 260. Support units = 14.18.	\$278,296.08	reflects State actual from "current FY"
Wages				
Administration	\$63,969.18			
Teachers	\$530,188.65			
Classified	\$99,352.17		\$693,509.01	reflects all salaries compared to State actual from "current FY"
Medicaid			\$0.00	reflects projected from "current FY"
Benefit	\$154,000.00		\$67,500.00	reflects State actual from "current FY"
Transportation	\$67,500.00		\$67,500.00	
Federal Revenue				
Title I	\$45,000.00		#DIV/0!	reflects State actual from "current FY"
Special Ed	\$24,000.00	Expected to be higher in 2nd year due to number of special education students.	#DIV/0!	reflects State actual from "current FY"
Title II	\$10,000.00		\$10,000.00	reflects State actual from "current FY"
Startup Grant			(\$0.11)	reflects State actual from "current FY"
Other Sources (Specify)	\$8,800.00	Technology, IRI, Gifted & Talented		
Other Sources (Specify)				
Other Sources (Specify)				
Total Revenue before holdback	\$1,281,106.68		#DIV/0!	
PROPOSED HOLDBACK				
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	\$1,281,106.68		\$1,281,106.12	reflects State actual from "current FY"
EXPENDITURES				
100 Salaries				
Teachers	\$445,000.00		10,000.00	reflects projected from "current FY"
Admin	\$80,000.00		0.00	reflects projected from "current FY"
Classified	\$122,500.00		97,500.00	reflects projected from "current FY"
Special education	\$30,000.00			
Other (Specify)				
Other (Specify)				
Total Salaries	\$677,500.00		107,500.00	
200 Benefits				
Benefit Dollars				
PERSI/Payroll taxes	\$172,000.00			
Other (Specify)	\$3,800.00	Worker's Comp.		
Total Benefits	\$175,800.00		\$7,145.00	reflects projected from "current FY"
300 Purchased Services				
Transportation	\$90,000.00		\$10,000.00	reflects projected from "current FY"
Special Education	\$5,000.00		(\$3,000.00)	reflects projected from "current FY"
Proctor costs				
Legal			\$0.00	reflects projected from "current FY"
Insurance	\$8,000.00		\$1,257.00	reflects projected from "current FY"
Copier Lease	\$8,000.00		\$8,000.00	
Printer Lease			\$0.00	
Facility Lease			\$0.00	reflects projected from "current FY"
Utilities	\$24,500.00		\$6,900.00	reflects projected from "current FY"
Professional Development	\$10,000.00		(\$13,000.00)	reflects projected from "current FY"
Technology	\$7,000.00		\$7,000.00	reflects projected from "current FY"

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UPCOMING FISCAL YEAR BUDGET COMPARISON

Management Services			\$0.00	reflects projected from "current FY"
Legal Publications/Advertising	\$1,000.00		\$500.00	reflects projected from "current FY"
Substitute Teachers	\$3,000.00		(\$4,500.00)	reflects projected from "current FY"
Board Expenses	\$5,000.00	Audit	\$0.00	reflects projected from "current FY"
Other (Specify)	\$2,000.00	Bank Service Charter, Dues & Fees		
Other (Specify)	\$3,500.00	Janitorial		
Total Purchased Services	\$167,000.00		\$13,157.00	
Supplies & Materials				
Teacher/Classroom	\$18,000.00		\$18,000.00	reflects projected from "current FY"
Office			\$0.00	Not in 2010 budget.
Janitorial	\$2,000.00		\$2,000.00	reflects projected from "current FY"
Textbooks			\$0.00	reflects projected from "current FY"
Other (Specify)	\$5,000.00	Maintenance		
Other (Specify)				
Total Supplies & Materials	\$25,000.00		\$20,000.00	
Grant Expenditures				
Specify				
Specify				
Specify				
Total Grant Expenditures	\$0.00			
Capital Outlay			\$0.00	
Total Capital Outlay			\$0.00	
Debt Retirement			\$0.00	
Total Debt Retirement	\$150,000.00	Building payments.	\$0.00	
Insurance & Judgements			\$0.00	
Total Insurance & Judgements	\$0.00		\$0.00	
Transfers			\$0.00	
Total Transfers	\$0.00		\$0.00	
Contingency Reserve	\$0.00			
Building Fund	\$0.00			
Total Expenditures	\$1,195,300.00		\$147,802.00	
Carryover from Previous FY	(\$74,637.70)	Reflects projected reserve/(deficit) from "current year" worksheet		
Reserve/(Deficit)	\$11,168.98			

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Legacy Charter School

REVENUE	Year 3 2013/2014	Year 4 2014/2015	Year 5 2015/2016
General Fund			
Beginning Balance	11,169	182,799	363,329
Other Local Revenue			
Lottery	0	0	0
State Apportionment	1,222,000	1,240,000	1,240,000
State Transportation	67,500	69,000	70,500
Gifted and Talented	800	800	800
State IRI	1,000	1,000	1,000
State Benefit Allocation	154,000	154,000	154,000
State Technology	7,000	7,000	8,000
Total State Revenue	1,463,469	1,654,599	1,837,629
Albertsons			
Special Ed. \$	24,000	24,000	24,000
Title I	45,000	45,000	45,000
Title II	10,000	10,000	10,000
Title X Grant	<u>0</u>	<u>0</u>	<u>0</u>
	1,542,469	1,733,599	1,916,629
EXPENDITURE			
Instructional Staff	535,000	535,000	545,000
Persi/FICA/Med	101,650	101,650	103,550
Non Certified	123,000	123,000	123,000
Persi/FICA/Med	23,370	23,370	23,370
Workers Comp	4,300	4,300	4,300
Health Benefits	<u>70,000</u>	<u>75,000</u>	<u>80,000</u>
Total HR Expense	857,320	862,320	879,220
Supplies	20,000	20,000	22,000
Equipment	2,000	3,000	3,000
Technology	7,000	7,000	8,000
Communications	7,000	7,500	8,000
Special Education	5,000	5,000	5,000
Novels & Textbooks	<u>1,500</u>	<u>1,500</u>	<u>1,500</u>
Education and Operating	42,500	44,000	47,500
Admin.	85,000	85,000	85,000
Persi/FICA/Med	16,150	16,150	16,150
Professional Development	10,000	10,000	10,000
General and Administrative	111,150	111,150	111,150
Busing	90,000	92,000	94,000
Lease/Mortgage	198,000	198,000	198,000
Maintenance Grounds/Bldg	10,000	10,000	11,000
Contract Service (Bathrooms, copier, L	23,000	24,000	25,000
Utilities	18,500	19,000	19,500
Audit	5,200	5,300	5,400
Bank Fees, Dues & Fees, Advertising	<u>4,000</u>	<u>4,500</u>	<u>5,000</u>
Total Occupancy Expense	<u>258,700</u>	<u>260,800</u>	<u>263,900</u>
Total Instruction, Building, Admin E	1,359,670	1,370,270	1,395,770
Unappropriated Bal/Contingency	182,799	363,329	520,859

Legacy Charter School Site Visit Report

January 31, 2012

Interview with Board Members:

Two board members participated in the interview. They expressed the mission of the school as being replication of Liberty and Victory and to promote excellent learning. They feel the school has done an exceptional job of fulfilling this mission. Board members feel the success of the school can be contributed to experienced teachers and administrators who are committed to maintaining the fidelity of the Harbor method.

The board reports that they function very well. They feel they have a wide variety of skills and experience that allow them to understand and carry out their role. Both board members participating in the interview have served on the board of Liberty. Thus, are very familiar with the role of the board and how to ensure Harbor concepts are implemented without deviation. They are currently seeking to fill one board seat. Potential candidates are required to successfully complete an assessment testing their knowledge of Harbor concepts and their ability to appropriately and consistently apply these concepts. Opportunities and resources are available for potential candidates to obtain Harbor training through a DVD and website tools. Active board members use these same resources for training, as well as ISBA training and resources.

Legacy administrators are viewed by the board as being effective.

As reported by the board, financially the school is in good shape despite the fact that they will end this year with a deficit. They view the deficit situation as being the result of losing the Charter Start Grant two weeks before the start of school. Becky Stallcop is acting founder of the school and is responsible for the budget for the first three years of operation. Projections show the school will begin building a reserve next year and will continue to do so every year thereafter. Because of Mrs. Stallcop and the success of Liberty and Victory, Legacy was able to obtain bank financing with agreeable terms for their new facility, even with the estimated first year deficit.

The school is currently located in portable units. Space is limited but is being used efficiently. No facility concerns were expressed by the board. Ground breaking for the new facility is occurring and the school plans to move in during August 2012. Some portions of the facility, such as the gym and auditorium, will be completed later in the fall.

According to the board, strengths of the school include a harbor based curriculum that is being implemented with fidelity, strong teachers who are experienced and committed to the methods used, and training provided by Liberty.

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Parent involvement is reported as being high. Parent volunteers are in classrooms on a daily basis. Some parents have been trained to provide interventions for struggling students. Two parent teacher conferences are held each year at which attendance is good.

Interview with Administrator:

School administration expresses the mission of the school as working to create competent, skilled, successful students who are well prepared when they leave Legacy. They believe the mission is being accomplished extremely well as they have exceeded their own expectations.

The administration position at Legacy is shared by the two seventh/eighth grade teachers. One person teaches in the morning and acts as administrator in the afternoon while the other one is administrator in the morning and teaches in the afternoon. All parties agree that this arrangement is working very well and see the fact that administrators continue to provide classroom instruction as very valuable. They are vigilant in performing their role as outlined by the Harbor method including oversight of the school to work program, accessibility to parents, and duty assignments. Both individuals agree that they have a great working relationship as they have spent many years working in the same schools and co-teaching. They feel they are able to build off of each other's strengths to oversee the day to day operations in an efficient and effective manner.

The Administration reports having a very good relationship with the board and considers them to be supportive. Administration sees their role as overseeing day to day operations and advising the board. They feel the board understands their role and effectively fulfills it.

From the administration's point of view, the success of the school lies in training provided by Liberty. They see the Harbor curriculum and instructional methods as strengths of the school. They feel there are no weaknesses in the Harbor method and therefore follow it without exception. Their goal is to continue to work hard to achieve. They are anxious for assessment results and feel students are on track to meet AYP and MSES.

Formal and informal teacher evaluations are complete and all teachers are properly certified and highly qualified. The two administrators are approved for alternate pathway certification to become highly qualified for seventh and eighth grade. Evaluations are based on a hybrid model of the Danielson framework and Harbor concepts. A middle level credit system is not in place. The school reports the SDE is aware of the situation and has approved it as Harbor schools have self contained middle school classrooms.

The school reports having an exceptional special education coordinator who has ensured compliance with all special education procedures for identification and provision of services. Becky Stallcop is in the process of aligning the Harbor curriculum to the common core standards. Once alignment is complete, teachers will receive training on implementing common core standards. The administration feels there is a natural fit with Harbor concepts and CCSS. Ongoing professional development takes place through mentoring new teachers and use of the website materials and training DVD.

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Marketing does not appear to be a major priority for Legacy. They consider word of mouth to be the most effective. Lottery information is contained in every parent letter. The information will also be provided in local newspaper ads.

Interview with Business Manager:

The business manager reports having adequate training for her job and a manageable work load. She indicates that Becky Stallcop develops the budget and she provides comments and suggestions. Becky has the final say over budget matters.

According to the business manager, the current year deficit is due to loss of the Charter Start Grant. The school had to cover expenses that had been planned as part of the grant funds. They had also purchased five and a half acres of land for the permanent facility. She has confidence in the three year budget projections which show reserves being built each year after the first.

Program Strengths:

- Dedicated staff, administration, and board
- Harbor method implemented with fidelity
- Aligning curriculum to common core standards
- RTI model has been implemented – natural part of Harbor
- Diversified board that understands and fulfills their role
- Teacher and administration evaluations completed
- Board and administration have a good working relationship
- Shared administration
- Replication of Liberty

Program Concerns:

- Possible charter violations include:
 - Piano lab and instruction is not being provided due to loss of funds. This is a priority the school plans to implement as soon as funds are available.
 - Mrs. Stallcop is referred to as the superintendent in the charter but is considered to be a founder rather than superintendent (minor language change). If she is considered a superintendent, the fte must be counted as such.

Possible Amendments:

- Piano lab/instruction if funding does not become available
- Language referring to Mrs. Stallcop as superintendent

Recommendations:

- Propose possible charter amendments as soon as possible.
- Continue alignment and implementation of common core standards.

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- Continue to acquire data and use it to drive decision making.

Materials requested:

- None

SUBJECT

Idaho Science and Technology Charter School Annual Update

APPLICABLE STATUTE, RULE, OR POLICY

I.C. 33-5209(2)

BACKGROUND

Idaho Science and Technology Charter School (ISTCS) is a public charter school authorized by the Public Charter School Commission (PCSC). Located in Blackfoot, ISTCS is now in its third year of operations and serves grades 6-8.

DISCUSSION

ISTCS will provide an update on the status of the school. PCSC staff has visited the school and reviewed the materials provided, and makes the following observations:

Currently 187 students are enrolled at ISTCS with a waiting list of 34. The school plans to increase enrollment the next two years to reach a total of 300 students.

ISTCS's new facility has permitted expansion of the technology lab, better equipped science classrooms, opening of the STEM lab, and a PE program.

ISAT scores reveal that ISTCS students are performing below the state average in all grade levels and subject areas and above local district averages in sixth and seventh grade for all subjects. Language and reading scores in the eighth grade are below the local district average and math scores are similar to those of the local district. ISTCS's performance improved in all subject areas across all grade levels from 2010 to 2011, but math scores prevented ISCTS from meeting AYP in 2011.

ISTCS met all is measurable student education standards (MSES) except MSES 6, which requires 80% of students to score proficient or advanced in each subject area on the ISAT. Only sixth and eighth grade reading scores met the standard with 83.6% and 87.5% proficient or advanced respectively.

The current budget is based on enrollment of 194 and anticipates a positive fund balance of \$62,000 for FY12. A positive fund balance of \$74,000 is anticipated for FY13. ISTCS is applying for USDA and Bank of Idaho loans to purchase the facility and avoid a lease payment increase in FY12.

The State Department of Education is investigating student transportation practices at both ISTCS and BCCLC, as they reportedly share transportation services and expenses in a manner that may or may not be considered appropriate.

IMPACT

Pursuant to I.C. 33-5209(2), if the PCSC “has reason to believe that a public charter school has...(b) Failed to substantially meet any of the student educational standards identified in the approved charter,” the PCSC must provide the public charter school written notice of the defect and provide a reasonable opportunity to cure the defect.

STAFF COMMENTS AND RECOMMENDATIONS

Staff recommends that the PCSC direct staff to issue to ISTCS a notice of defect on the grounds of failure to substantially meet any of the measureable student educational standards identified in the approved charter, specifically, MSES 6 with regard to ISAT results.

Additionally, staff notes that ISTCS continues to be slow to respond to staff requests for information and required documentation.

COMMISSION ACTION

A motion to direct staff to issue to Idaho Science and Technology Charter School a written notice of defect on the grounds of failure to substantially meet any of the measureable student educational standards identified in the approved charter, specifically, MSES 6 with regard to ISAT results.

Moved by _____ Seconded by _____ Carried Yes _____ No _____

CHARTER SCHOOL DASHBOARD

Date: 1/11/2012

School Name: Idaho Science and Technology Charter School

School Address: 21 North 550 West, Blackfoot, ID 83221

School Phone: 208-785-7827

Current School Year: 2011-2012

School Mission: To provide a solid foundation in core subjects with an emphasis on science, technology, humanities and arts, and a broad program to explore educational and career opportunities. ISTCS will prepare students to make intelligent and appropriate decisions about their education and future career pathways.

CHARTER SCHOOL BOARD

Board Member Name	Office and Term	Skill Set(s)	Email	Phone
Rich Dodds	Chairman, Appointed Annually	Retired Project Manager	rdodds@inreach.com	208-569-9092
Mike Kitzmiller	Vice Chair 1 Year Appointed	Health Care Provider	kitzmljk@msn.com	208-782-1804
Holly Lilya	Treasurer 3 year term	Parent	queststinks@hotmail.com	208*785-1236
Rod Jaques	Parent member 3 year elected	Owner Physical Therapy Center	piotlifeadv.@aol.com	208-684-9814
Jenny Thomas	Clerk 3 year elected	Psychologist Trauma Specialist	jeremyt@wmconnect.com	643-9480
John Heintzelman	3 year elected	Engineer	jheintze@yahoo.com	208-680-2401
Dave Cannon	1 year appointed	Attorney	dvdcnnn@gmail.com	208-406-9637

ENROLLMENT

Grade Level	Current Enrollment	Current ADA	Current Waiting List	Previous Year's Enrollment	Previous Year's ADA
K					
1					
2					
3					
4					
5					
6	70	95.85	23	56	92.93
7	66	95.54	7	44	94.14
8	51	94.81	4	18	94.33
9					
10					
11					
12					
TOTAL	187	95.45	34	128	93.57

Student Attrition Rate: 8%

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Is your school planning to increase or decrease enrollment opportunities for the upcoming school year? Increase. If yes, briefly describe planned enrollment changes, including numbers and grades affected: We anticipate growing the school over two more years until we reach 300. Surprisingly our largest growth this year was in the 7th grade because as students are transitioning from 6th to 7th in the local district, parents are looking for choices. We had to turn students away in the 7th and 8th grades this year because of available classroom seating.

STUDENT DEMOGRAPHICS

School Year	Hispanic (# and %)	Asian (# and %)	White (# and %)	Black (# and %)	American Indian (# and %)	LEP (# and %)	FRL (# and %)	Special Education (# and %)
Current	15	3	164	2	6	0	108/59%	50/27%
Previous	8	1	78	1	4	0		33/30%

FACULTY AND STAFF

Administrator Name(s): Dr. Fred Ball and Gary Larsen
 Administrator's Hire Date: 7/01/2009
 Administrator Email(s): fball@bcccl.com; gary.larsen@idahoscitech.com
 Current Classified Staff (# FTE): 6.6
 Classified Attrition Rate: 4%
 Current Faculty (# FTE): 12.2
 Faculty Attrition Rate: 20%

EDUCATIONAL PROGRAM

Did your school make AYP during the last school year? no
 If no, please specify indicator and status: math year 1
 If no, please describe plan for addressing need: We have made the following changes in our math program:
 1. We have revised our placement for services for our math students.
 2. We have vertically aligned our program with the elementary schools in our area that provide students
 3. We have increased our math program to include 2 full time teachers
 4. We have hired an additional part time aide to help our students, especially our low performing ones.

Was your school selected to participate in NAEP this year? no

REPORTING

Date of last programmatic operations audit? November 2011
 Date submitted to authorizer? Presenting it with this report. We will provide a written response as we review the results of this audit. We are very please with the findings of Mrs. Demerest's team.
 Who performed your most recent programmatic audit? Dianne Demerest with Charter School Network
 Date of most recent fiscal audit? August 4, 2011
 Date submitted to authorizer? October 10, 2011

COMMENTS

Please describe any significant changes experienced by your school in the past year:
 We have made significant improvements to our educational program this year. First, we hired a second math teacher with the responsibility to teach students in the lower sections of math. This is a full time position. The two math teachers compliment each other very well in the teaching of math. Second, we have vertically aligned our curriculum with the gradeschools that we draw students from. This allows us to close some of the gaps in learning such as science. Third, we have also hired two aides to assist our special education teacher and students. These two aides are here on

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alternating days and they are with the same students. This provides stability and continuity for many of our challenged students. Fourth, we have also hired another science teacher and a part-time counselor and Spanish teacher. As the counselor, she takes some of the load off our school psychologist and special ed director.

Another significant change is moving into our new building. It has helped us nearly double our enrollment which in turn allowed us to hire additional teachers and aides. It has also allowed us to expand our technology lab and include the full curriculum we have been promising to our parents and students. Our science classrooms are better equipped to do all the hands-on learning experiences that our curriculum provides. We now have a very successful P.E. program because we have the facilities to support this program. Finally, we have partnered with a provider in town to offer a reasonable and affordable lunch. Along with this, we have facilities to allow students to eat in the Commons and patio areas rather than in the classrooms which we had to do in the past.

We also have an excellent computer lab consisting of desk-top computers and supportive software. We have hired a new computer applications teacher to help students learn more valuable ways to utilize computers in their learning experiences. This teacher also teaches some English classes which was necessary because of our increased enrollment.

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

Some of our accomplishments are:

We sent a team to First Lego League for the state competition.

We had a team participate in Future City competition in Boise.

Our eighth grade students attended Idaho State University's Engineering day.

We have an excellent music program with a large majority of our students participating in some form of music training throughout the day. Our school choir had more than forty percent of our students. We had after-school choirs, which were open to any child in our community, that increased our visibility and public awareness. We had two classes of guitar because so many students wanted to learn how to play.

The opening of our STEM Lab cannot be overstated. Students can now learn more exciting topics through hands-on learning stations. It was one of our most important selling points in the first two years of our school and now we have it.

Our end of year activity with the students has been extremely successful in each of the past years. With the support both in financial and physical help, we were able to get outside the school facilities and enjoy a wide variety of activities. The luncheon provided by the PAC was the final activity of the year.

We have slowly made our way technologically to the "Cloud", which allows students to store assignments and also access them from home as well as school. This will be significant especially as we are one of the pioneers for this technology in an educational setting.

Our ISAT scores showed significant improvement in all areas. Unfortunately we fell a couple of percentage points short of the state standards in math, but our total growth was substantial. Data is included as an appendage.

We sent six of our ten teachers to IRI training last year and have utilized that information to help identify students that are struggling.

We have greatly improved our relationship with the surrounding community by offering our facilities to many groups to gather here for after school activities and community functions. By opening up our building for the public, we feel many opportunities for growth have been started.

Our increased enrollment, from 110 to 193, has really boosted our image in the community and allowed us to expand our program in positive ways. Word of mouth provided most of the new students because we didn't advertise in any expanded way.

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Please describe any challenges you anticipate during the upcoming year:

Our biggest challenge to date has been our communications programs. Our phones, email accounts, fax, and website have been unsuccessful for many weeks. We anticipated that with the new building all our programs would be up and running. The reality is that they all need to be integrated successfully and it has taken many weeks and many tough decisions to reach the stability that now seems attainable.

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

We have made some difficult decisions regarding our technological support. It has taken more time than we wanted to but in the end our venturing into the "Cloud" will provide greater access for our students and ultimately, less maintenance on our part.

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



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IDAHO STANDARDS ACHIEVEMENT TESTS (ISAT)
NCLB STATE REPORT OF DISTRICT SCORES AND DEMOGRAPHICS
SPRING 2011

GRADE 6

DISTRICT: IDAHO SCIENCE & TECHNOLOGY CHARTER SCHOOL DISTRICT 468

PAGE: 1

Proficiency Level Ranges				Reading						Mathematics						Language Usage					
				Average Scale Score	Number Tested	% Below Basic (BB)	% Basic (B)	% Proficient (P)	% Advanced (A)	Average Scale Score	Number Tested	% Below Basic (BB)	% Basic (B)	% Proficient (P)	% Advanced (A)	Average Scale Score	Number Tested	% Below Basic (BB)	% Basic (B)	% Proficient (P)	% Advanced (A)
A = Advanced, P = Proficient, B = Basic, BB = Below Basic	Reading	Mathematics	Language Usage																		
A	>222	>230	>226																		
P	208-222	218-230	214-226																		
B	201-207	209-217	206-213																		
BB	<201	<209	<206																		
All Students	217	55	7.3	9.1	50.9	32.7	222	55	3.6	29.1	49.1	18.2	217	55	12.7	20.0	52.7	14.5			
Male	216	27	7.4	11.1	44.4	37.0	224	27	0	25.9	51.9	22.2	216	27	14.8	25.9	44.4	14.8			
Female	219	28	7.1	7.1	57.1	28.6	221	28	7.1	32.1	46.4	14.3	217	28	10.7	14.3	60.7	14.3			
American Indian / Alaskan Native	*	4	*	*	*	*	*	4	*	*	*	*	*	4	*	*	*	*			
Asian	*	0	*	*	*	*	*	0	*	*	*	*	*	0	*	*	*	*			
Black / African American	*	0	*	*	*	*	*	0	*	*	*	*	*	0	*	*	*	*			
Native Hawaiian / Other Pacific Islander	*	1	*	*	*	*	*	1	*	*	*	*	*	1	*	*	*	*			
White	218	44	9.1	6.8	50.0	34.1	223	44	2.3	27.3	52.3	18.2	217	44	13.6	18.2	54.5	13.6			
Hispanic or Latino Ethnicity	*	6	*	*	*	*	*	6	*	*	*	*	*	6	*	*	*	*			
Two or More Races	*	0	*	*	*	*	*	0	*	*	*	*	*	0	*	*	*	*			
Economically Disadvantaged	*	0	*	*	*	*	*	0	*	*	*	*	*	0	*	*	*	*			
LEP	*	0	*	*	*	*	*	0	*	*	*	*	*	0	*	*	*	*			
Migrant	*	0	*	*	*	*	*	0	*	*	*	*	*	0	*	*	*	*			
Special Education	*	5	*	*	*	*	*	5	*	*	*	*	*	5	*	*	*	*			
Title I A	214	11	0	9.1	81.8	9.1	218	11	9.1	36.4	45.5	9.1	214	11	0	45.5	54.5	0			

* Less than or equal to 9 tested students



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IDAHO STANDARDS ACHIEVEMENT TESTS (ISAT)
NCLB STATE REPORT OF DISTRICT SCORES AND DEMOGRAPHICS
SPRING 2011

GRADE 7

DISTRICT: IDAHO SCIENCE & TECHNOLOGY CHARTER SCHOOL DISTRICT 468

PAGE: 1

Proficiency Level Ranges				Reading						Mathematics					Language Usage							
				Average Scale Score	Number Tested	% Below Basic (BB)	% Basic (B)	% Proficient (P)	% Advanced (A)	Average Scale Score	Number Tested	% Below Basic (BB)	% Basic (B)	% Proficient (P)	% Advanced (A)	Average Scale Score	Number Tested	% Below Basic (BB)	% Basic (B)	% Proficient (P)	% Advanced (A)	
A = Advanced, P = Proficient, B = Basic, BB = Below Basic	Reading	Mathematics	Language Usage																			
A	>226	>236	>231																			
P	212-226	223-236	218-231																			
B	204-211	215-222	209-217																			
BB	<204	<215	<209																			
All Students	222	43	14.0	9.3	44.2	32.6	227	43	14.0	27.9	27.9	30.2	220	43	18.6	20.9	46.5	14.0				
Male	219	26	15.4	11.5	46.2	26.9	227	26	15.4	23.1	30.8	30.8	218	26	19.2	23.1	50.0	7.7				
Female	226	17	11.8	5.9	41.2	41.2	227	17	11.8	35.3	23.5	29.4	224	17	17.6	17.6	41.2	23.5				
American Indian / Alaskan Native	*	1	*	*	*	*	*	1	*	*	*	*	*	1	*	*	*	*				
Asian	*	0	*	*	*	*	*	0	*	*	*	*	*	0	*	*	*	*				
Black / African American	*	1	*	*	*	*	*	1	*	*	*	*	*	1	*	*	*	*				
Native Hawaiian / Other Pacific Islander	*	0	*	*	*	*	*	0	*	*	*	*	*	0	*	*	*	*				
White	223	40	12.5	7.5	45.0	35.0	228	40	10.0	30.0	27.5	32.5	221	40	17.5	20.0	47.5	15.0				
Hispanic or Latino Ethnicity	*	1	*	*	*	*	*	1	*	*	*	*	*	1	*	*	*	*				
Two or More Races	*	0	*	*	*	*	*	0	*	*	*	*	*	0	*	*	*	*				
Economically Disadvantaged	*	0	*	*	*	*	*	0	*	*	*	*	*	0	*	*	*	*				
LEP	*	0	*	*	*	*	*	0	*	*	*	*	*	0	*	*	*	*				
Migrant	*	0	*	*	*	*	*	0	*	*	*	*	*	0	*	*	*	*				
Special Education	207	12	41.7	33.3	16.7	8.3	216	12	50.0	33.3	8.3	8.3	210	12	58.3	25.0	8.3	8.3				
Title I A	*	6	*	*	*	*	*	6	*	*	*	*	*	6	*	*	*	*				



February 9, 2012
IDAHO STANDARDS ACHIEVEMENT TESTS (ISAT)
NCLB STATE REPORT OF DISTRICT SCORES AND DEMOGRAPHICS
SPRING 2011

GRADE 7

DISTRICT: IDAHO SCIENCE & TECHNOLOGY CHARTER SCHOOL DISTRICT 468

PAGE: 1

Proficiency Level Ranges		Science					
		Average Scale Score	Number Tested	% Below Basic (BB)	% Basic (B)	% Proficient (P)	% Advanced (A)
A = Advanced, P = Proficient, B = Basic, BB = Below Basic							
Science							
A	>218						
P	213-218						
B	206-212						
BB	<206						
All Students		213	43	20.9	27.9	20.9	30.2
Male		213	26	15.4	34.6	19.2	30.8
Female		213	17	29.4	17.6	23.5	29.4
American Indian / Alaskan Native		*	1	*	*	*	*
Asian		*	0	*	*	*	*
Black / African American		*	1	*	*	*	*
Native Hawaiian / Other Pacific Islander		*	0	*	*	*	*
White		214	40	17.5	27.5	22.5	32.5
Hispanic or Latino Ethnicity		*	1	*	*	*	*
Two or More Races		*	0	*	*	*	*
Economically Disadvantaged		*	0	*	*	*	*
LEP		*	0	*	*	*	*
Migrant		*	0	*	*	*	*
Special Education		204	12	58.3	25.0	8.3	8.3
Title I A		*	6	*	*	*	*



February 9, 2012
IDAHO STANDARDS ACHIEVEMENT TESTS (ISAT)
NCLB STATE REPORT OF DISTRICT SCORES AND DEMOGRAPHICS
SPRING 2011

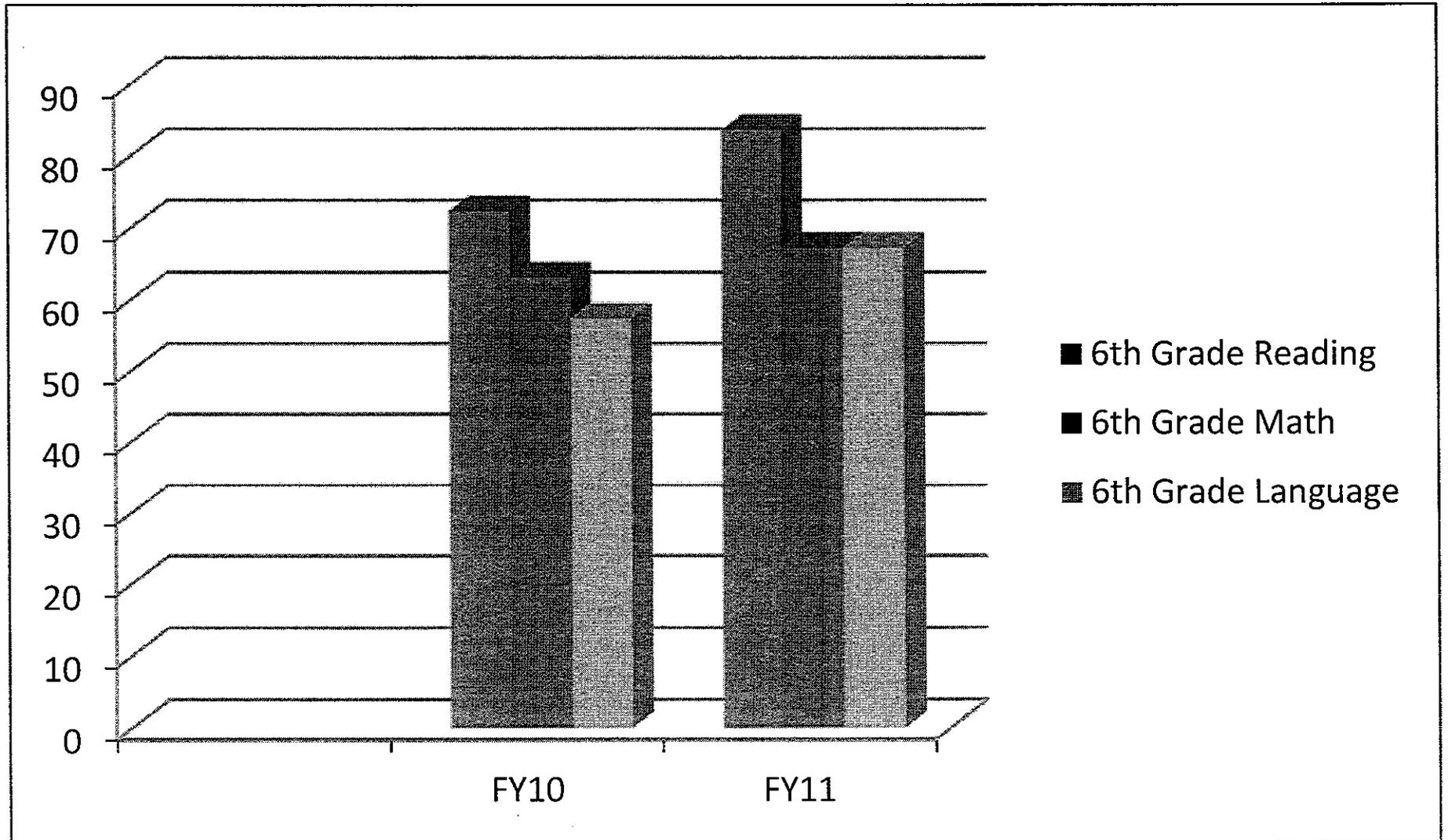
GRADE 8

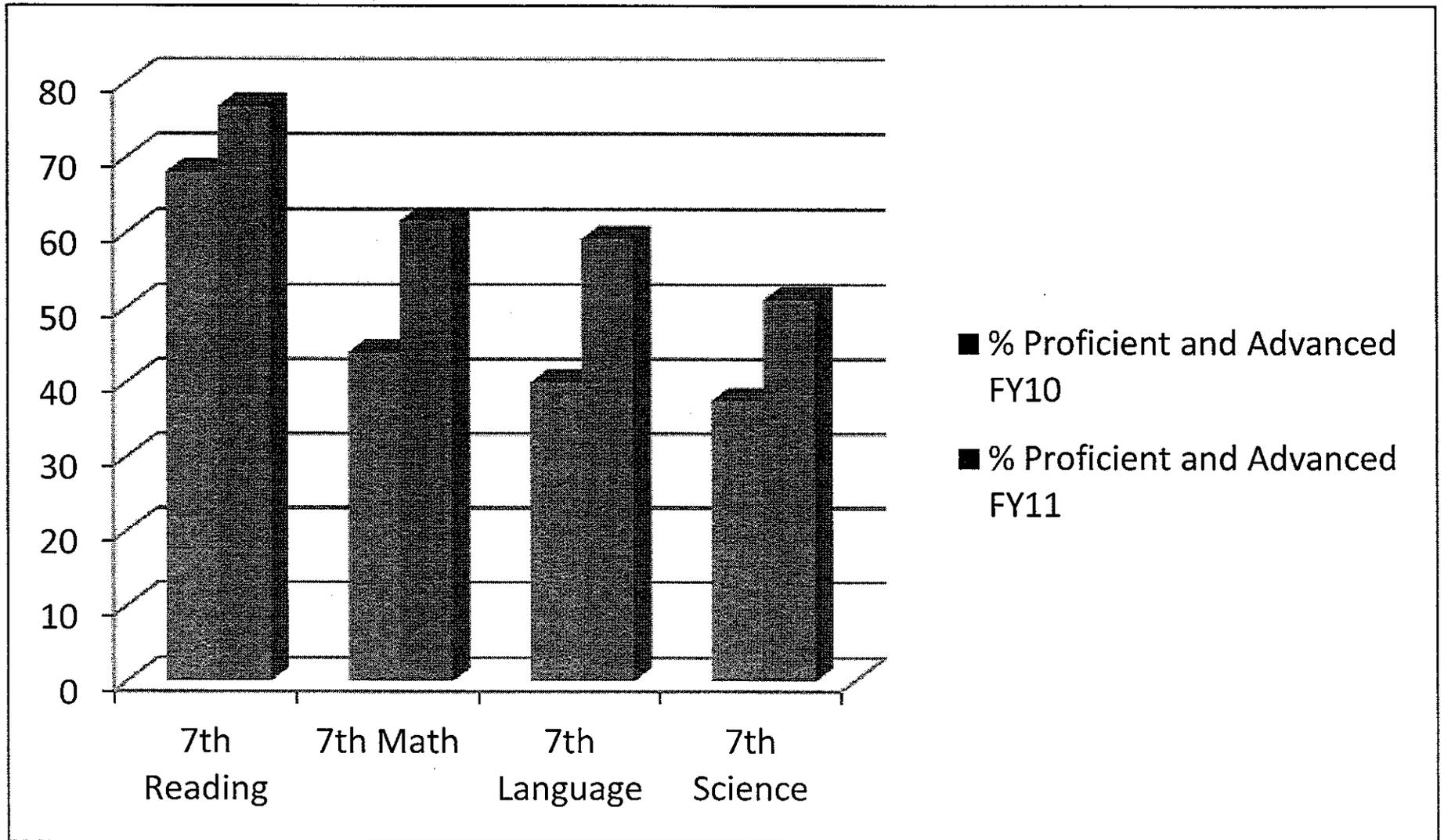
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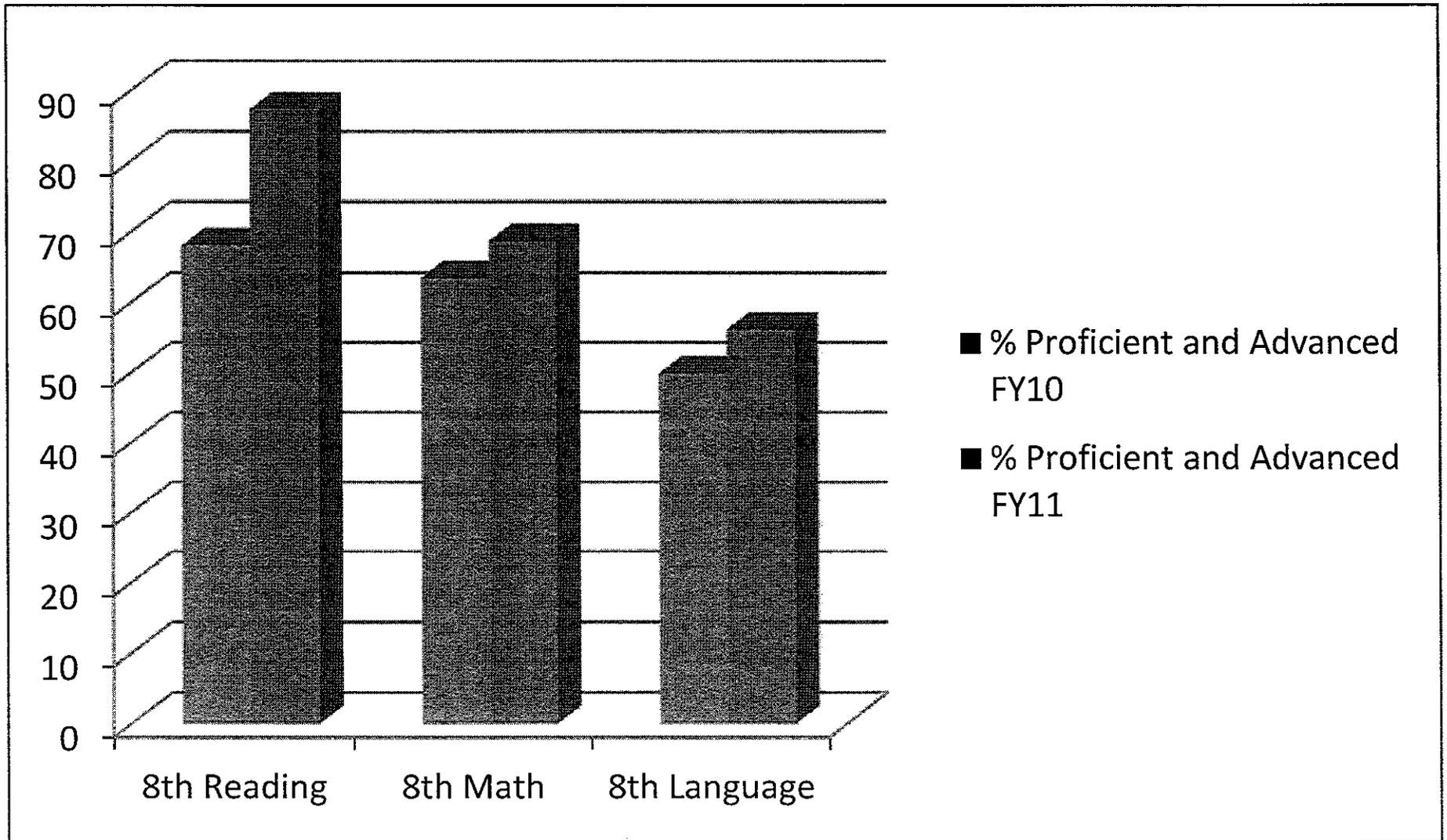
DISTRICT: IDAHO SCIENCE & TECHNOLOGY CHARTER SCHOOL DISTRICT 468

Proficiency Level Ranges				Reading						Mathematics					Language Usage						
				Average Scale Score	Number Tested	% Below Basic (BB)	% Basic (B)	% Proficient (P)	% Advanced (A)	Average Scale Score	Number Tested	% Below Basic (BB)	% Basic (B)	% Proficient (P)	% Advanced (A)	Average Scale Score	Number Tested	% Below Basic (BB)	% Basic (B)	% Proficient (P)	% Advanced (A)
A = Advanced, P = Proficient, B = Basic, BB = Below Basic				Reading				Mathematics					Language Usage								
A	Reading	Mathematics	Language Usage																		
A	>228	>242	>235																		
P	214-228	229-242	221-235																		
B	207-213	220-228	213-220																		
BB	<207	<220	<213																		
All Students				229	16	0	12.5	37.5	50.0	234	16	0	31.3	50.0	18.8	225	16	12.5	31.3	43.8	12.5
Male				*	5	*	*	*	*	*	5	*	*	*	*	*	5	*	*	*	*
Female				231	11	0	9.1	36.4	54.5	235	11	0	27.3	54.5	18.2	226	11	18.2	27.3	36.4	18.2
American Indian / Alaskan Native				*	0	*	*	*	*	*	0	*	*	*	*	*	0	*	*	*	*
Asian				*	0	*	*	*	*	*	0	*	*	*	*	*	0	*	*	*	*
Black / African American				*	0	*	*	*	*	*	0	*	*	*	*	*	0	*	*	*	*
Native Hawaiian / Other Pacific Islander				*	0	*	*	*	*	*	0	*	*	*	*	*	0	*	*	*	*
White				229	16	0	12.5	37.5	50.0	234	16	0	31.3	50.0	18.8	225	16	12.5	31.3	43.8	12.5
Hispanic or Latino Ethnicity				*	0	*	*	*	*	*	0	*	*	*	*	*	0	*	*	*	*
Two or More Races				*	0	*	*	*	*	*	0	*	*	*	*	*	0	*	*	*	*
Economically Disadvantaged				*	0	*	*	*	*	*	0	*	*	*	*	*	0	*	*	*	*
LEP				*	0	*	*	*	*	*	0	*	*	*	*	*	0	*	*	*	*
Migrant				*	0	*	*	*	*	*	0	*	*	*	*	*	0	*	*	*	*
Special Education				*	3	*	*	*	*	*	3	*	*	*	*	*	3	*	*	*	*
Title I A				*	3	*	*	*	*	*	3	*	*	*	*	*	3	*	*	*	*

* Less than or equal to 9 tested students







February 9, 2012



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Blackfoot, ID 83221
Phone: 208-785-7827
Fax: 208-785-9913
www.idahoscience.com

Measurable Student Educational Standards: January 11, 2012

ISTCS will seek to accomplish the following goals:

1. In the core subject areas of Math, Language Arts, and Science 80% of students will earn a grade of satisfactory or above as calculated by classroom assessments and recorded on quarterly and semester report cards.

Final Scores: (Must be "C" or higher to be satisfactory)

Math: 80%

Science: 95%

Language Arts: 91%

2. 85% of students will demonstrate technological competency by scoring at least 80% on the end of year technology competency examination or receiving a score of at least 80 on their technology portfolio.

96%

3. 90% of sixth graders will achieve satisfactory or above on their career exploration project.

100%

4. 90% of seventh graders will achieve a score of satisfactory or above on their career research project.

100%

5. 90% of eighth graders will achieve a score of satisfactory or above on their career internship project.

93%

6. Students continuously enrolled at ISTCS from the beginning of each academic year will demonstrate academic improvement through the following:

80% of students in grade 7 will earn an Idaho Direct Writing Assessment (DWA) Score of proficient or better.

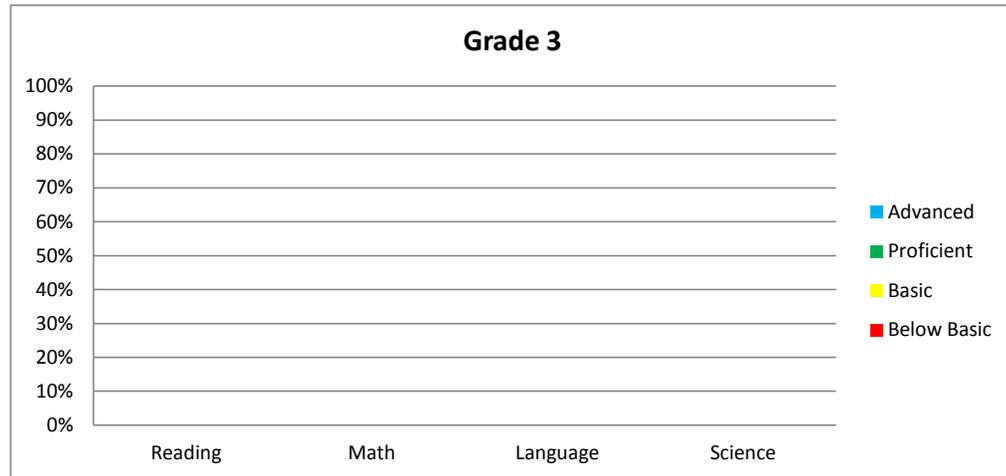
- 80% of students in grades 6 and 8 will earn an Idaho Direct Math Assessment (DMA) Score of proficient or better.
- 80% of all students will earn a score of proficient or advanced in each subject area of the Idaho Standards Achievement Test (ISAT).

(See ISAT attachment to this dashboard report.)

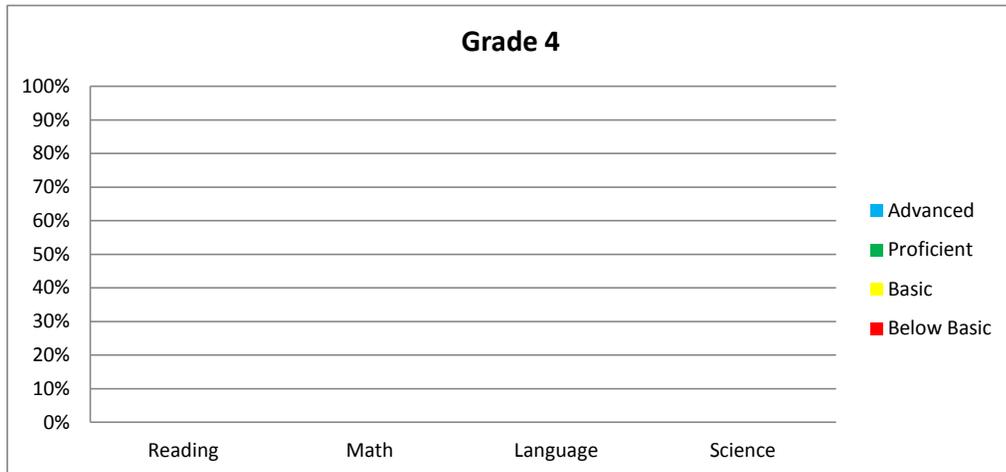
February 9, 2012

Charter School Parent Survey 2011-2012					
A	B	C	D	E	F
1. How did you learn about the charter school?					
Friends	Newspaper	Tv/radio	Community	Other	
52%	6%	1%	21%	20%	
2. How many children do you currently have enrolled in the charter school?					
One	Two	Three or more			
75%	18%	7%			
3. What type of school did your child attend last year?					
Public	Parochial	Private	Home Study	Charter	
47%			7%	47%	
4. What is the primary reason you decided to enroll your child in the charter school?					
Location	Discipline	Class Size	Teacher/Staff	Curriculum	
4%	13%	22%	22%	43%	
5. What is the primary reason your child left his/her previous school?					
Location	Discipline	Class Size	Teacher/Staff	Curriculum	
1%	18%	27%	39%	15%	
6. How satisfied were you with your child's previous school?					
Very Satisfiend	Somewhat Satisfied	Somewhat Dissatis.	Very Dissatisfied		
17%	38%	24%	14%	13%	
7. How was your child academically performing at his/her previous school?					
Below Grade Level	At Grade Level	Above Grade Level			
27%	48%	24%			
8. How is your child academically performing at the charter school?					
Below Grade Level	At Grade Level	Above Grade Level			
17%	59%	25%			
10. How satisfied are you with your child's current charter school?					
Very	Somewhat satisfied	Somewhat Dissatis.	Very Dissatisfied		
62%	30%	8%			
11. How likely are you to send your child to this charter school next year?					
Very Likely	Somewhat Likely	Somewhat unlikely	Very unlikely		
46%	37%	9%	7%		
12. If you could grade the performance of this charter school, what grade would you give it?					
Excellent	Good	Fair	Failing		
52%	34%	15%			
13. What is your education background?					
Less High School	High School	GED/Vo Tech	Four year College	Grad. Deg.	
9%	18%	24%	42%	7%	
15. What is your current marital status?					
Never Married	Separated	Divorced	Married		
8%		24%	75%		
16. What is the ethnicity of your child/children attending the charter school?					
American Indian	Asian/ Pac Islander	Hispanic	African/America	Caucasian	
7%	2%	10%	2%	84%	

Grade 3	Reading	Math	Language	Science
Below Basic	#N/A	#N/A	#N/A	
Basic	#N/A	#N/A	#N/A	
Proficient	#N/A	#N/A	#N/A	
Advanced	#N/A	#N/A	#N/A	

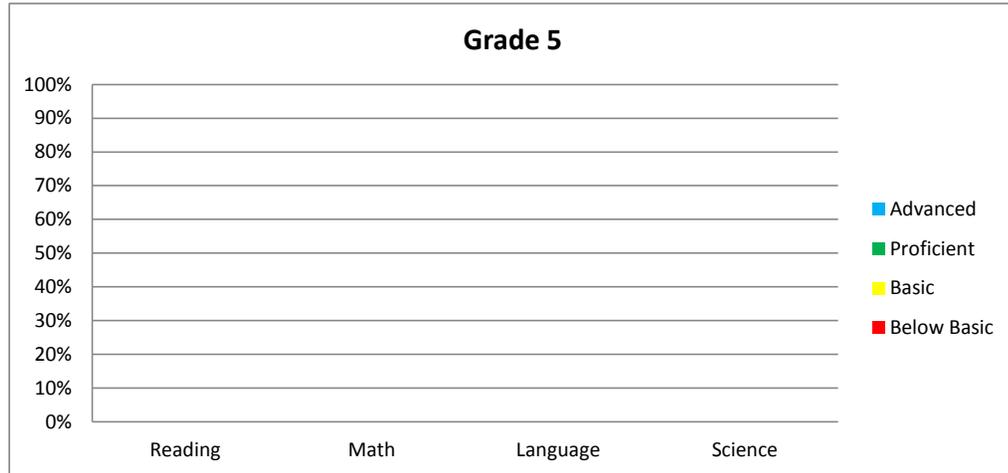


Grade 4	Reading	Math	Language	Science
Below Basic	#N/A	#N/A	#N/A	
Basic	#N/A	#N/A	#N/A	
Proficient	#N/A	#N/A	#N/A	
Advanced	#N/A	#N/A	#N/A	

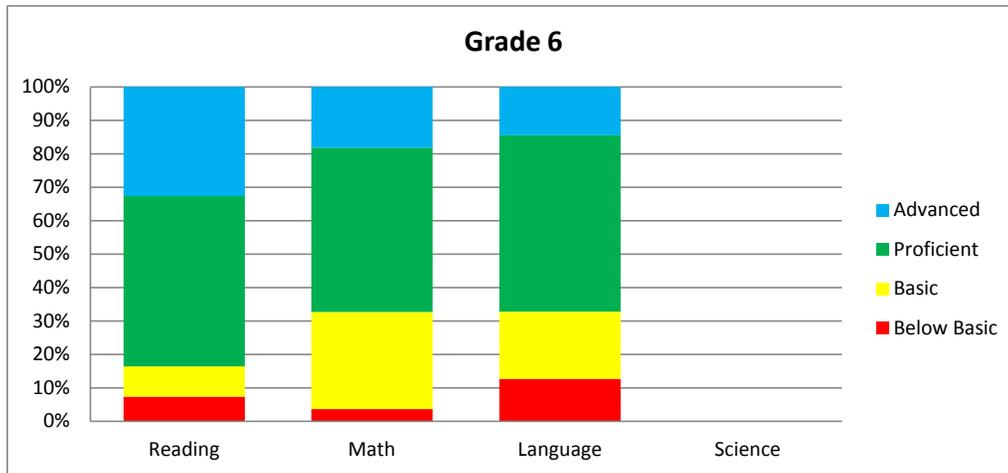


February 9, 2012

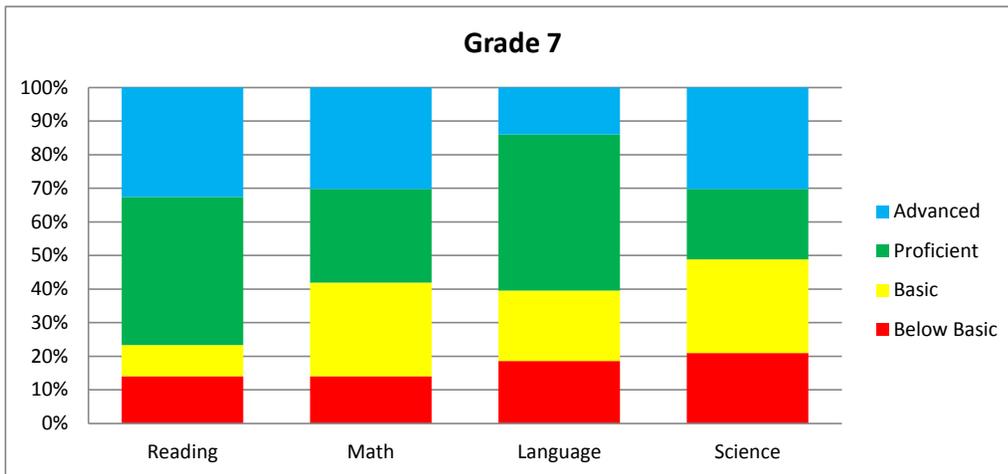
Grade 5	Reading	Math	Language	Science
Below Basic	#N/A	#N/A	#N/A	#N/A
Basic	#N/A	#N/A	#N/A	#N/A
Proficient	#N/A	#N/A	#N/A	#N/A
Advanced	#N/A	#N/A	#N/A	#N/A



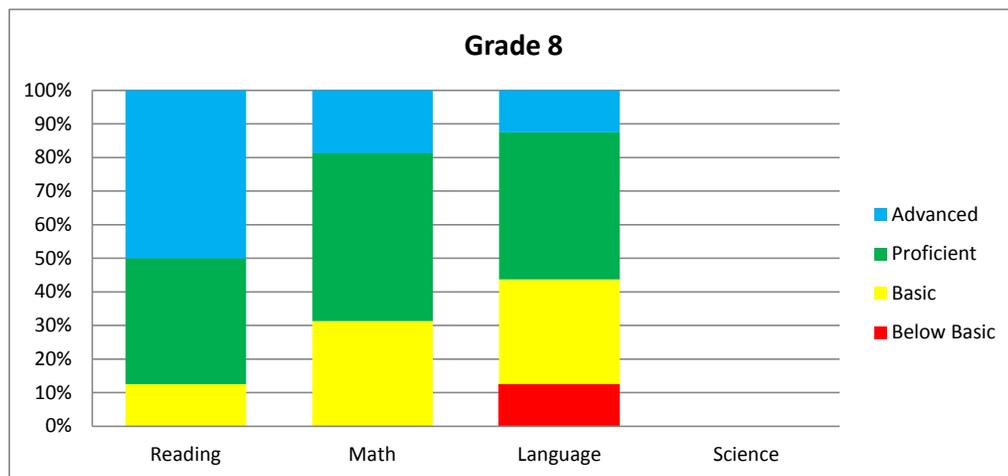
Grade 6	Reading	Math	Language	Science
Below Basic	7.3	3.6	12.7	
Basic	9.1	29.1	20	
Proficient	50.9	49.1	52.7	
Advanced	32.7	18.2	14.5	



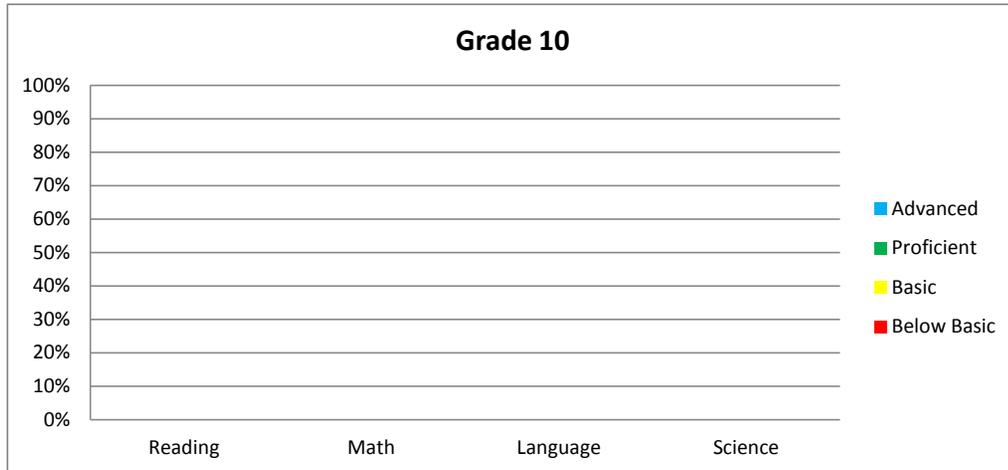
Grade 7	Reading	Math	Language	Science
Below Basic	14	14	18.6	20.9
Basic	9.3	27.9	20.9	27.9
Proficient	44.2	27.9	46.5	20.9
Advanced	32.6	30.2	14	30.2



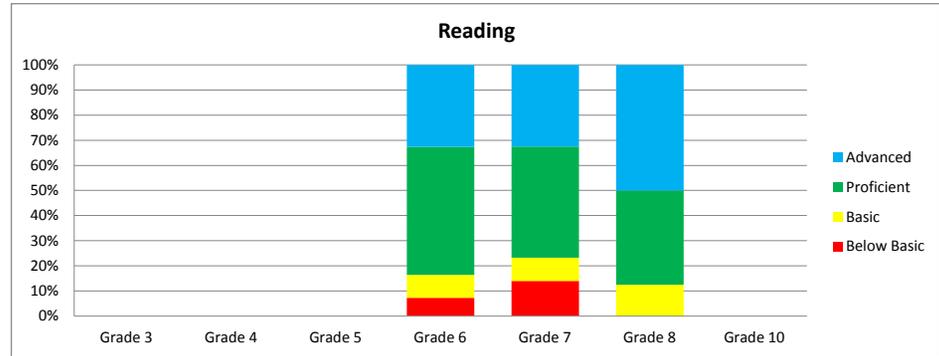
Grade 8	Reading	Math	Language	Science
Below Basic	0	0	12.5	
Basic	12.5	31.3	31.3	
Proficient	37.5	50	43.8	
Advanced	50	18.8	12.5	



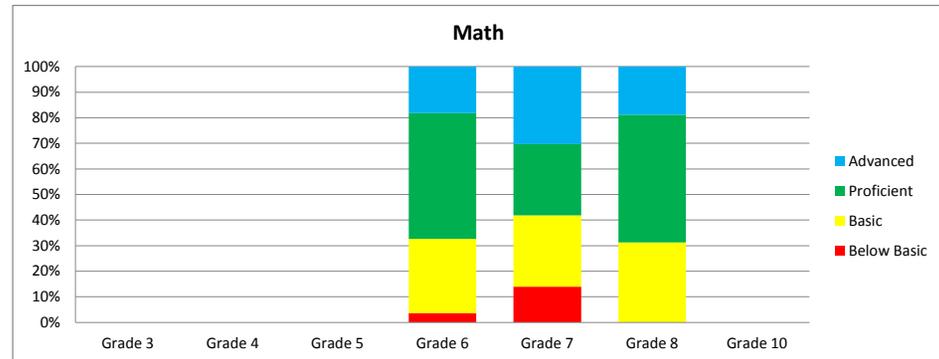
Grade 10	Reading	Math	Language	Science
Below Basic	#N/A	#N/A	#N/A	#N/A
Basic	#N/A	#N/A	#N/A	#N/A
Proficient	#N/A	#N/A	#N/A	#N/A
Advanced	#N/A	#N/A	#N/A	#N/A



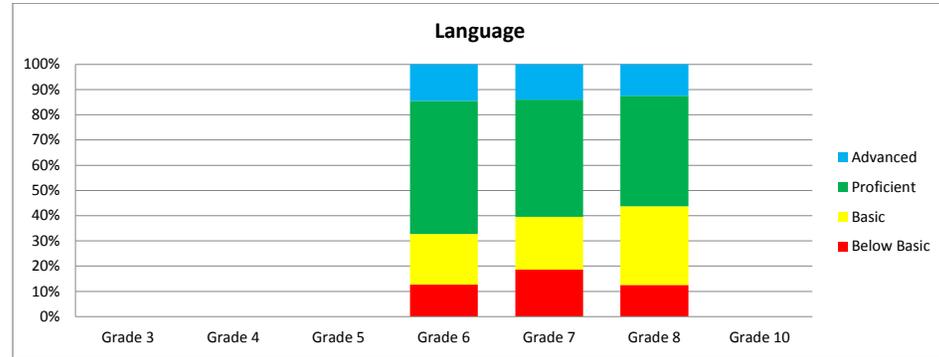
Reading	Grade 3	Grade 4	Grade 5	Grade 6	Grade 7	Grade 8	Grade 10
Below Basic	#N/A	#N/A	#N/A	7.3	14	0	#N/A
Basic	#N/A	#N/A	#N/A	9.1	9.3	12.5	#N/A
Proficient	#N/A	#N/A	#N/A	50.9	44.2	37.5	#N/A
Advanced	#N/A	#N/A	#N/A	32.7	32.6	50	#N/A



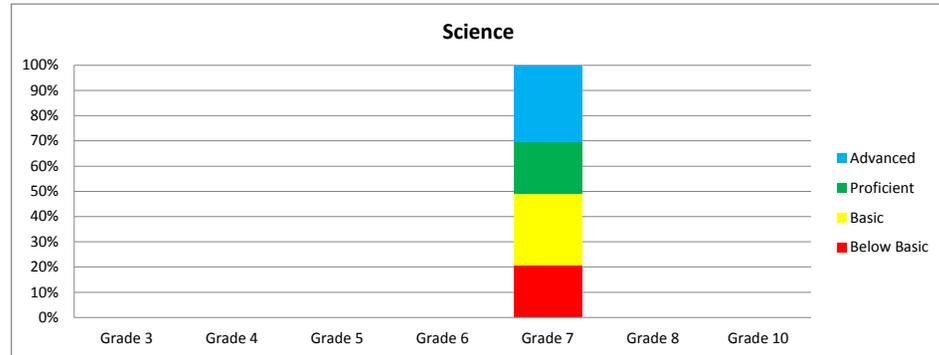
Math	Grade 3	Grade 4	Grade 5	Grade 6	Grade 7	Grade 8	Grade 10
Below Basic	#N/A	#N/A	#N/A	3.6	14	0	#N/A
Basic	#N/A	#N/A	#N/A	29.1	27.9	31.3	#N/A
Proficient	#N/A	#N/A	#N/A	49.1	27.9	50	#N/A
Advanced	#N/A	#N/A	#N/A	18.2	30.2	18.8	#N/A



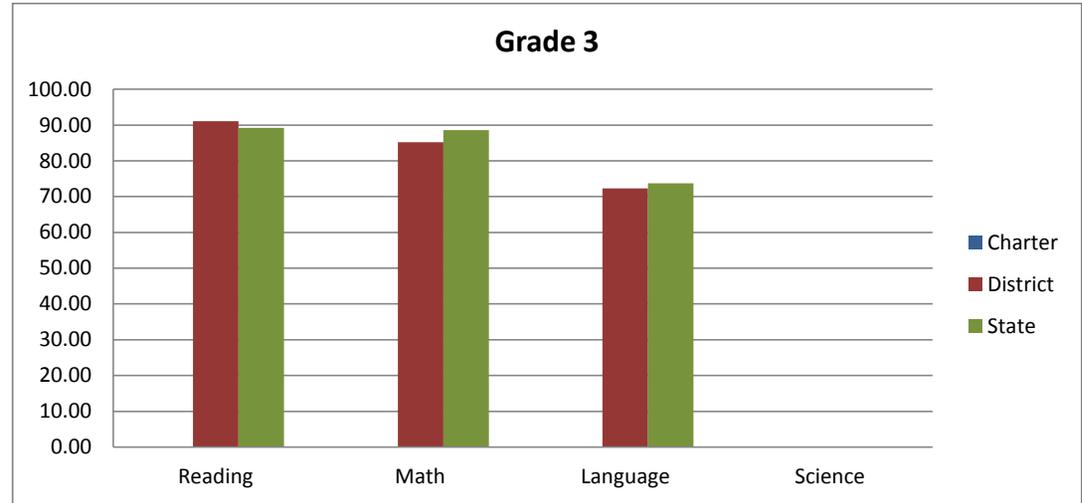
Language	Grade 3	Grade 4	Grade 5	Grade 6	Grade 7	Grade 8	Grade 10
Below Basic	#N/A	#N/A	#N/A	12.7	18.6	12.5	#N/A
Basic	#N/A	#N/A	#N/A	20	20.9	31.3	#N/A
Proficient	#N/A	#N/A	#N/A	52.7	46.5	43.8	#N/A
Advanced	#N/A	#N/A	#N/A	14.5	14	12.5	#N/A



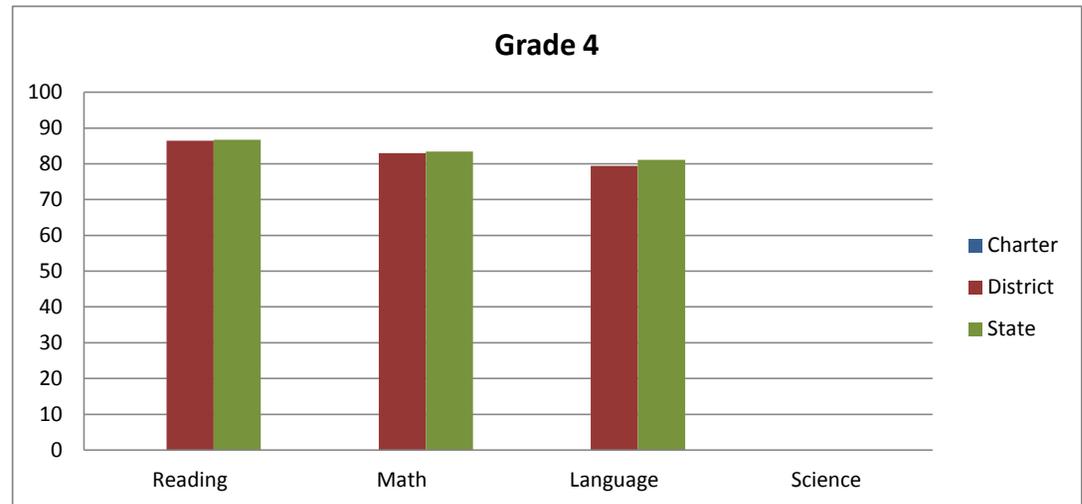
Science	Grade 3	Grade 4	Grade 5	Grade 6	Grade 7	Grade 8	Grade 10
Below Basic	#N/A	#N/A	#N/A		20.9		#N/A
Basic	#N/A	#N/A	#N/A		27.9		#N/A
Proficient	#N/A	#N/A	#N/A		20.9		#N/A
Advanced	#N/A	#N/A	#N/A		30.2		#N/A



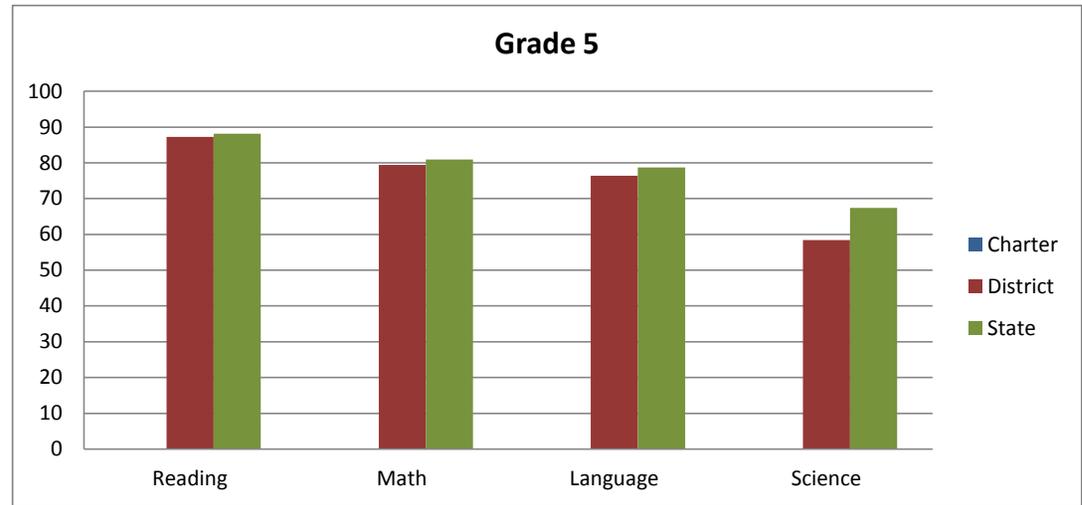
Grade 3	Reading	Math	Language	Science
Charter	#N/A	#N/A	#N/A	
District	91.1	85.2	72.3	
State	89.2	88.6	73.7	



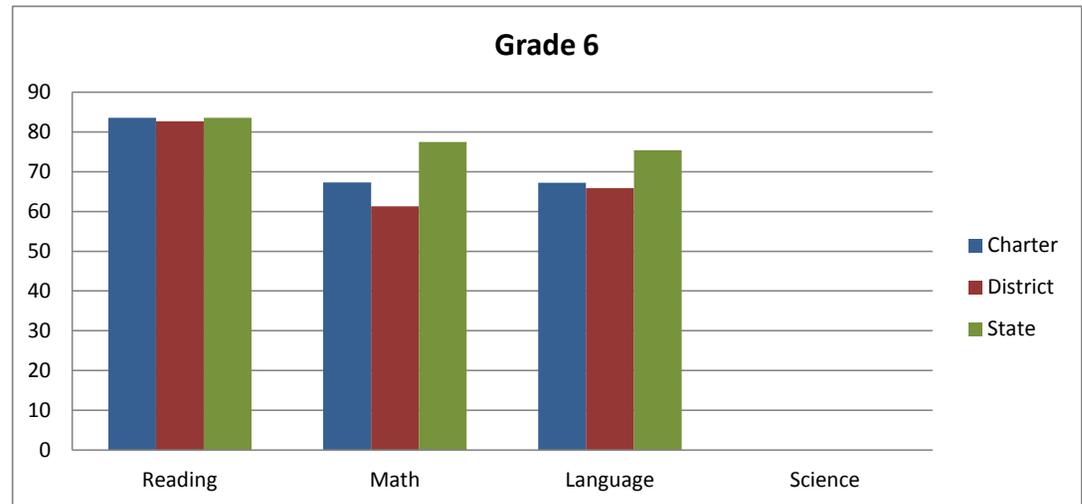
Grade 4	Reading	Math	Language	Science
Charter	#N/A	#N/A	#N/A	
District	86.4	83	79.4	
State	86.7	83.4	81.1	



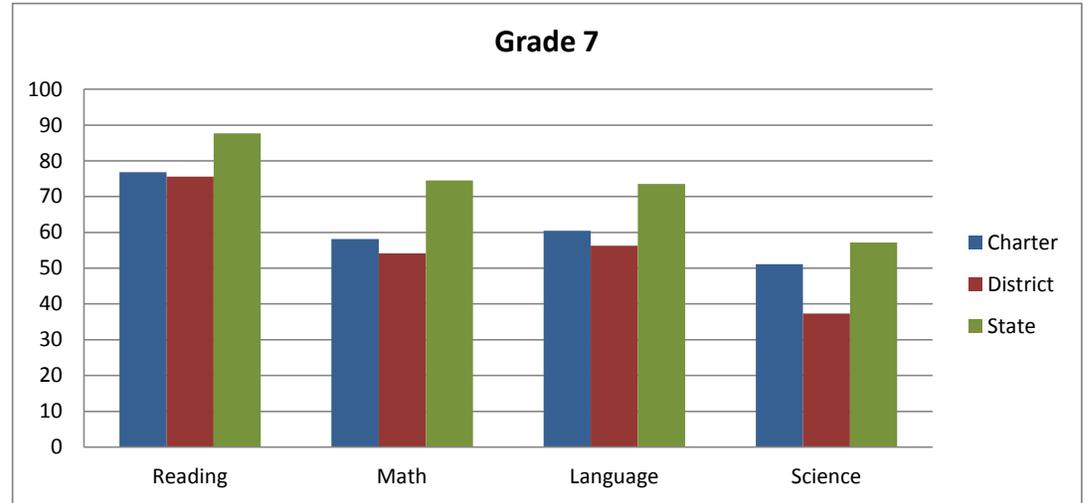
Grade 5	Reading	Math	Language	Science
Charter	#N/A	#N/A	#N/A	#N/A
District	87.2	79.4	76.4	58.4
State	88.1	80.9	78.7	67.4



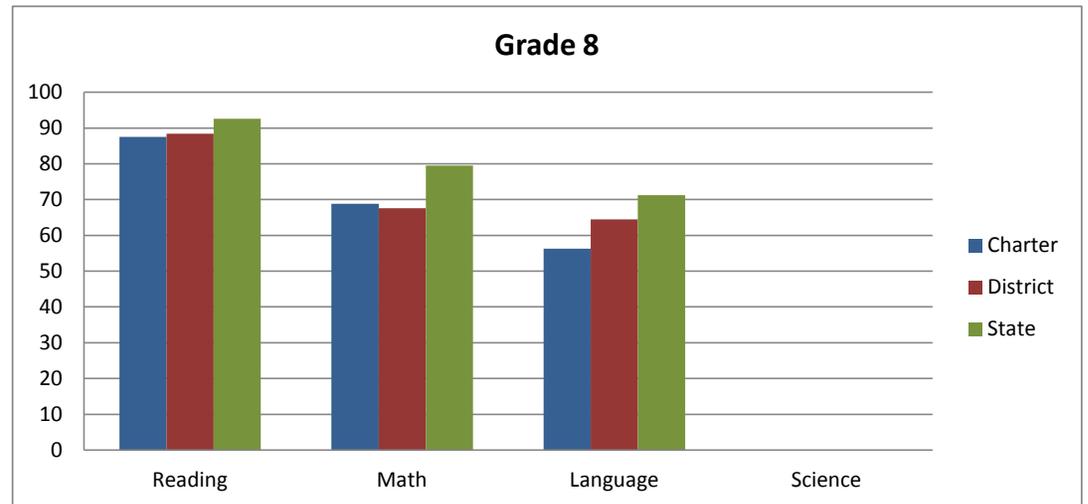
Grade 6	Reading	Math	Language	Science
Charter	83.6	67.3	67.2	
District	82.7	61.3	65.9	
State	83.6	77.5	75.4	



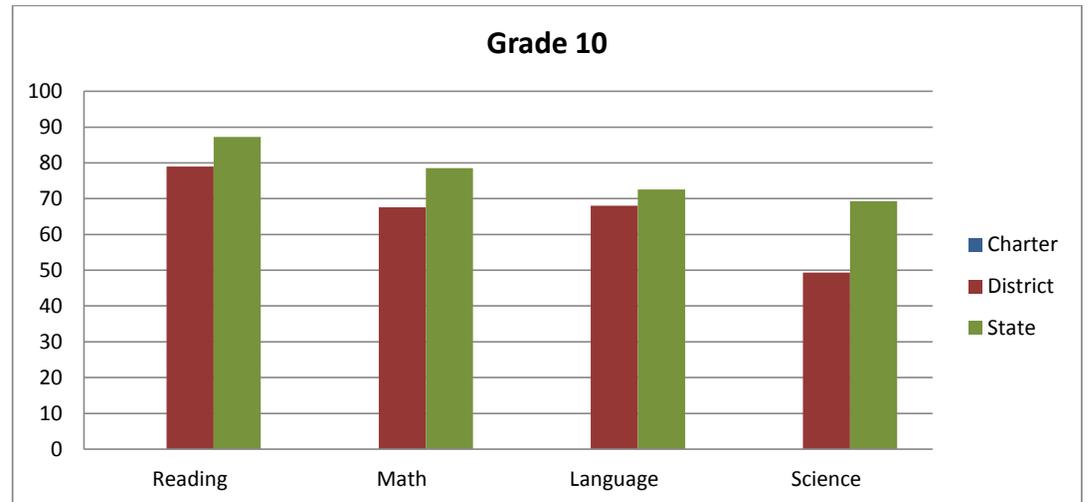
Grade 7	Reading	Math	Language	Science
Charter	76.8	58.1	60.5	51.1
District	75.6	54.1	56.3	37.3
State	87.7	74.5	73.5	57.2



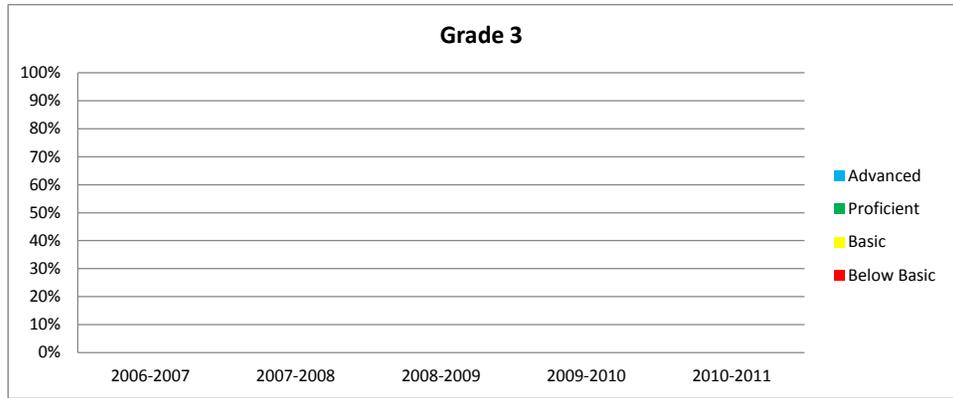
Grade 8	Reading	Math	Language	Science
Charter	87.5	68.8	56.3	
District	88.4	67.6	64.5	
State	92.6	79.5	71.2	



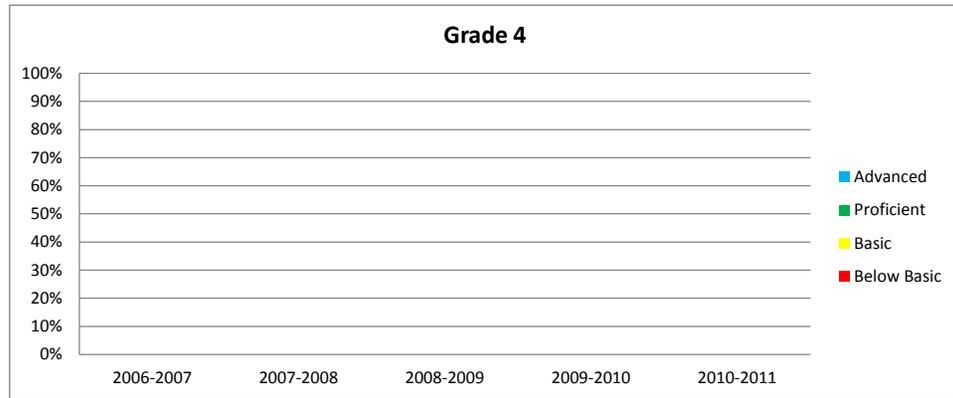
Grade 10	Reading	Math	Language	Science
Charter	#N/A	#N/A	#N/A	#N/A
District	79	67.6	68	49.3
State	87.2	78.5	72.6	69.3



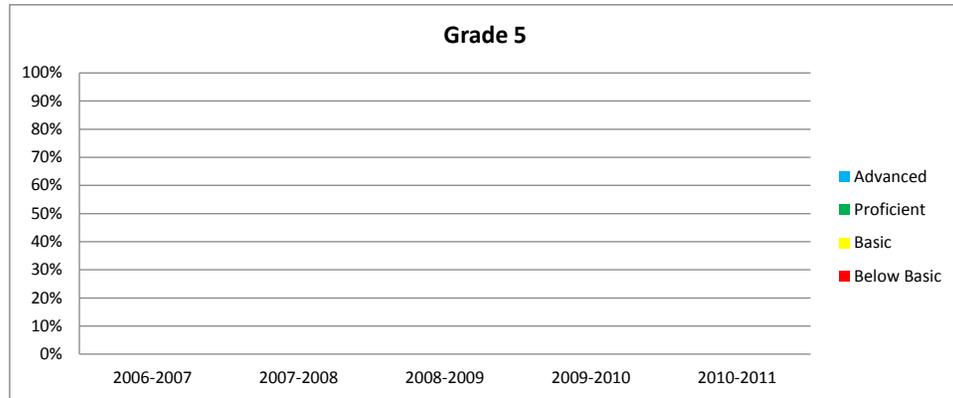
Reading Grade 3	2006-2007	2007-2008	2008-2009	2009-2010	2010-2011
Below Basic	#N/A	#N/A	#N/A	#N/A	#N/A
Basic	#N/A	#N/A	#N/A	#N/A	#N/A
Proficient	#N/A	#N/A	#N/A	#N/A	#N/A
Advanced	#N/A	#N/A	#N/A	#N/A	#N/A



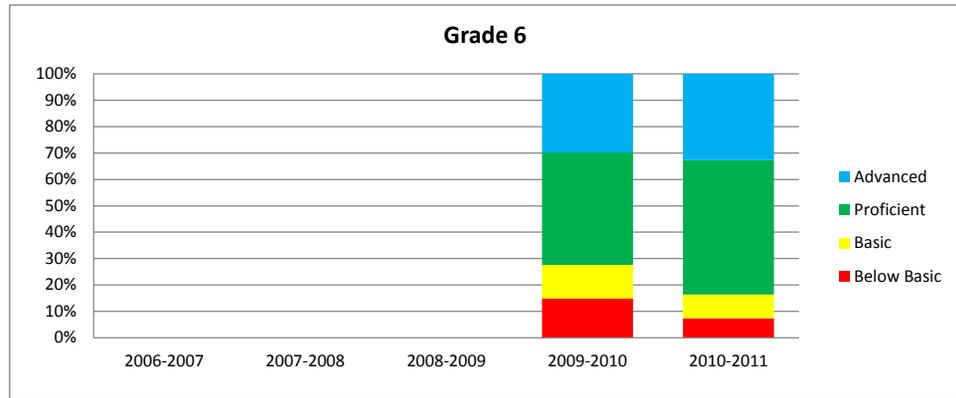
Reading Grade 4	2006-2007	2007-2008	2008-2009	2009-2010	2010-2011
Below Basic	#N/A	#N/A	#N/A	#N/A	#N/A
Basic	#N/A	#N/A	#N/A	#N/A	#N/A
Proficient	#N/A	#N/A	#N/A	#N/A	#N/A
Advanced	#N/A	#N/A	#N/A	#N/A	#N/A



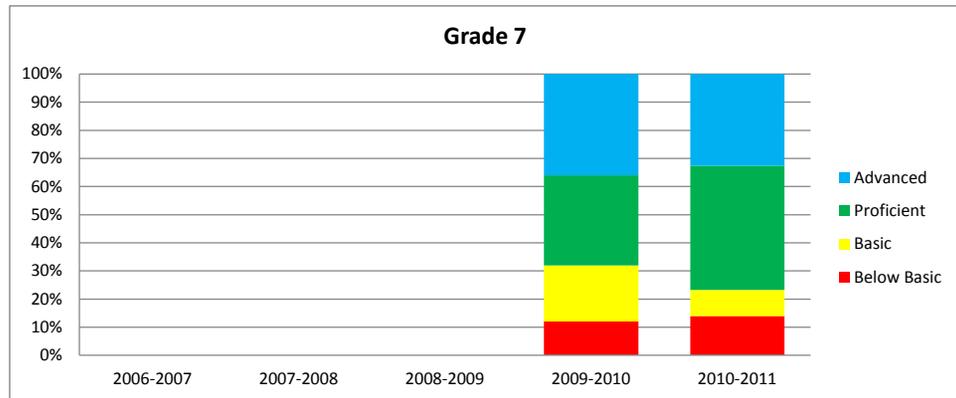
Reading Grade 5	2006-2007	2007-2008	2008-2009	2009-2010	2010-2011
Below Basic	#N/A	#N/A	#N/A	#N/A	#N/A
Basic	#N/A	#N/A	#N/A	#N/A	#N/A
Proficient	#N/A	#N/A	#N/A	#N/A	#N/A
Advanced	#N/A	#N/A	#N/A	#N/A	#N/A



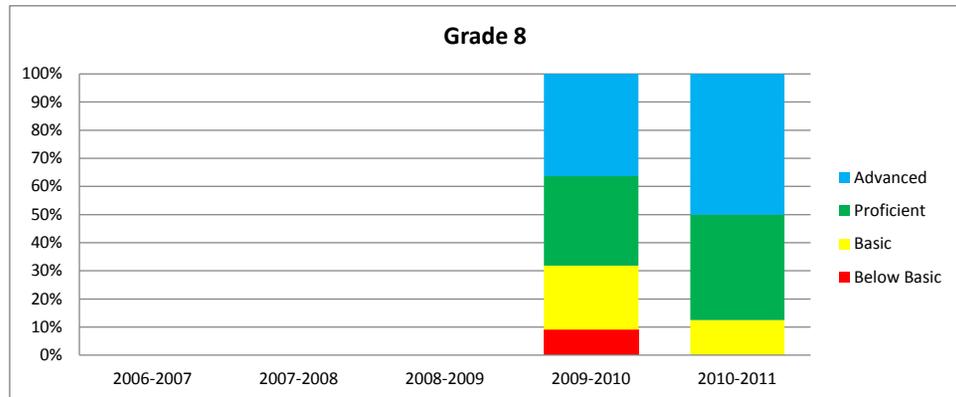
Reading Grade 6	2006-2007	2007-2008	2008-2009	2009-2010	2010-2011
Below Basic	#N/A	#N/A	#N/A	14.9	7.3
Basic	#N/A	#N/A	#N/A	12.8	9.1
Proficient	#N/A	#N/A	#N/A	42.6	50.9
Advanced	#N/A	#N/A	#N/A	29.8	32.7



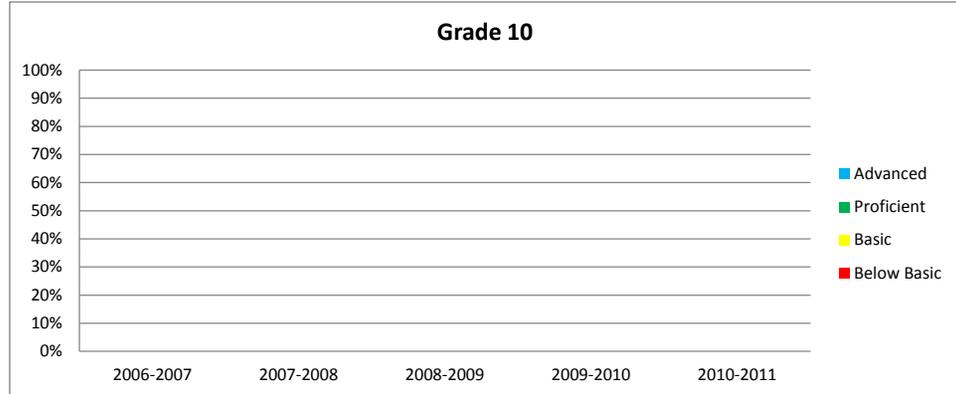
Reading Grade 7	2006-2007	2007-2008	2008-2009	2009-2010	2010-2011
Below Basic	#N/A	#N/A	#N/A	12	14
Basic	#N/A	#N/A	#N/A	20	9.3
Proficient	#N/A	#N/A	#N/A	32	44.2
Advanced	#N/A	#N/A	#N/A	36	32.6



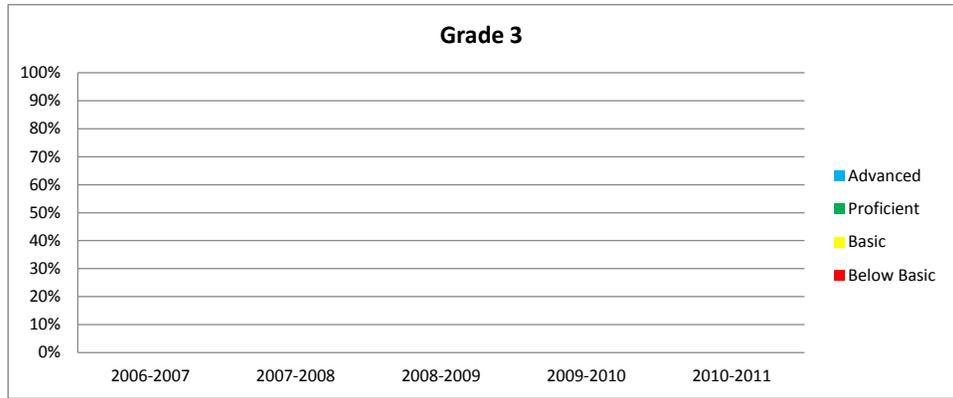
Reading Grade 8	2006-2007	2007-2008	2008-2009	2009-2010	2010-2011
Below Basic	#N/A	#N/A	#N/A	9.1	0
Basic	#N/A	#N/A	#N/A	22.7	12.5
Proficient	#N/A	#N/A	#N/A	31.8	37.5
Advanced	#N/A	#N/A	#N/A	36.4	50



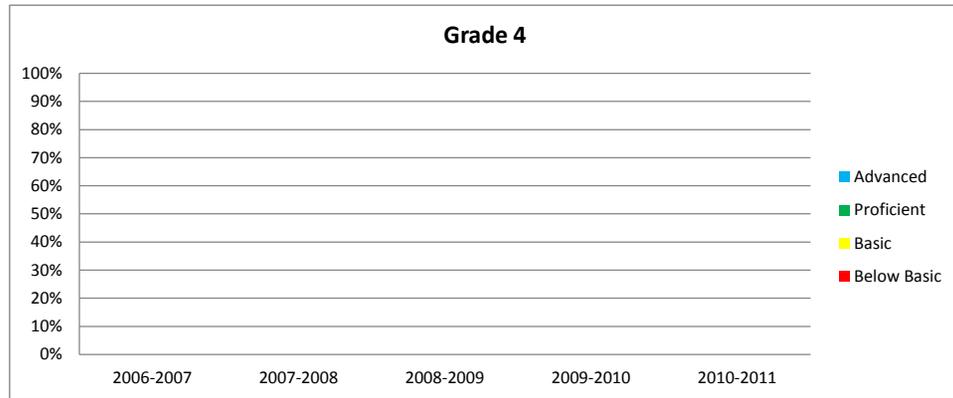
Reading Grade 10	2006-2007	2007-2008	2008-2009	2009-2010	2010-2011
Below Basic	#N/A	#N/A		#N/A	#N/A
Basic	#N/A	#N/A		#N/A	#N/A
Proficient	#N/A	#N/A		#N/A	#N/A
Advanced	#N/A	#N/A		#N/A	#N/A



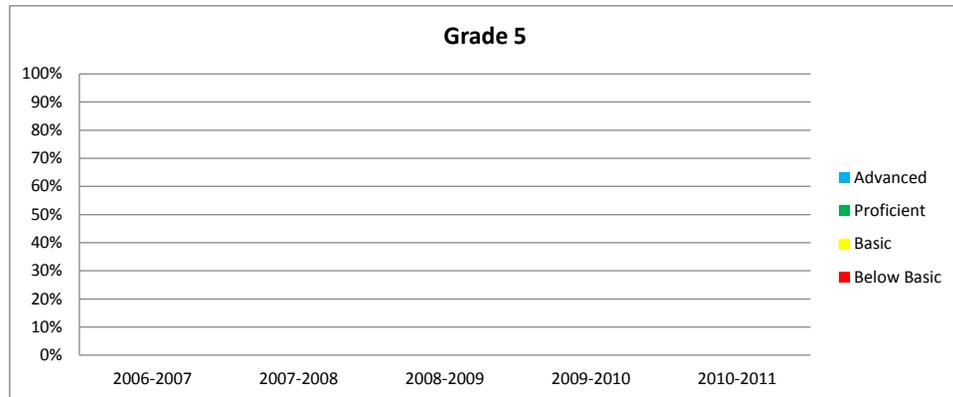
Math Grade 3	2006-2007	2007-2008	2008-2009	2009-2010	2010-2011
Below Basic	#N/A	#N/A	#N/A	#N/A	#N/A
Basic	#N/A	#N/A	#N/A	#N/A	#N/A
Proficient	#N/A	#N/A	#N/A	#N/A	#N/A
Advanced	#N/A	#N/A	#N/A	#N/A	#N/A



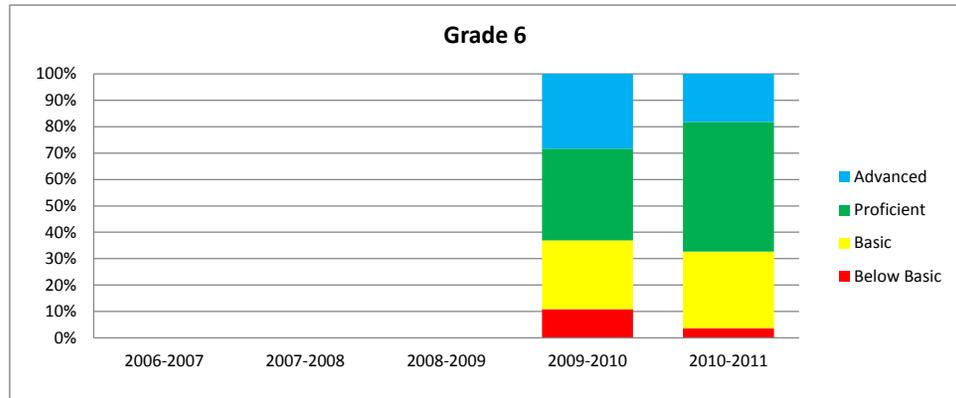
Math Grade 4	2006-2007	2007-2008	2008-2009	2009-2010	2010-2011
Below Basic	#N/A	#N/A	#N/A	#N/A	#N/A
Basic	#N/A	#N/A	#N/A	#N/A	#N/A
Proficient	#N/A	#N/A	#N/A	#N/A	#N/A
Advanced	#N/A	#N/A	#N/A	#N/A	#N/A



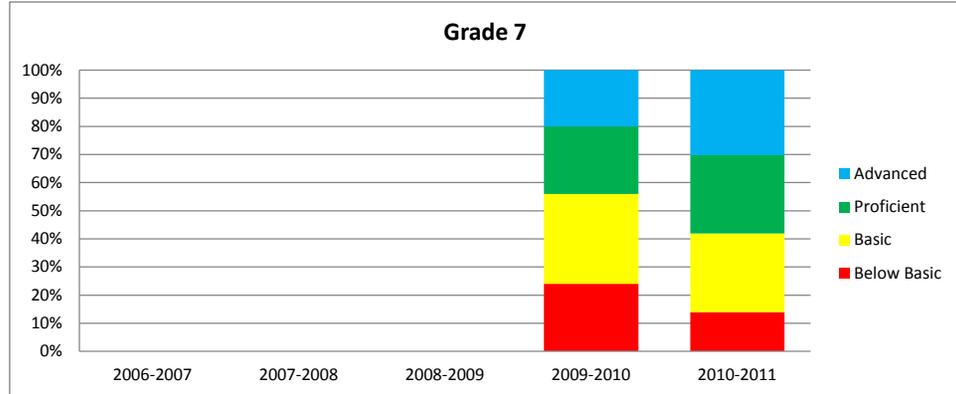
Math Grade 5	2006-2007	2007-2008	2008-2009	2009-2010	2010-2011
Below Basic	#N/A	#N/A	#N/A	#N/A	#N/A
Basic	#N/A	#N/A	#N/A	#N/A	#N/A
Proficient	#N/A	#N/A	#N/A	#N/A	#N/A
Advanced	#N/A	#N/A	#N/A	#N/A	#N/A



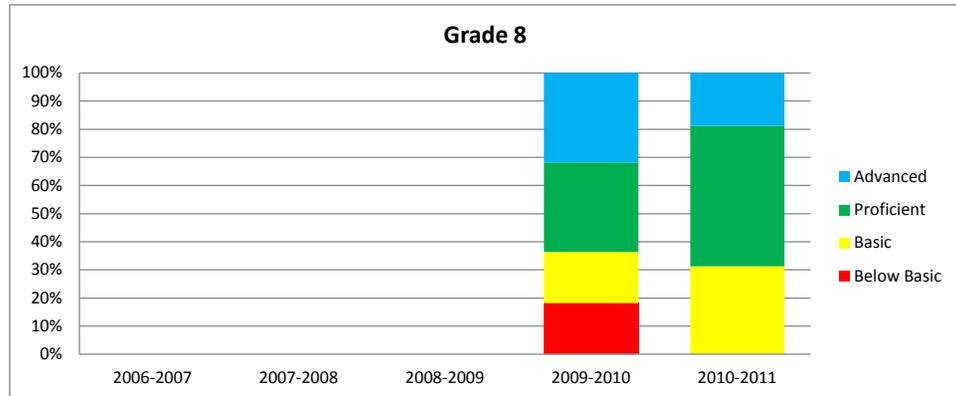
Math Grade 6	2006-2007	2007-2008	2008-2009	2009-2010	2010-2011
Below Basic	#N/A	#N/A	#N/A	10.9	3.6
Basic	#N/A	#N/A	#N/A	26.1	29.1
Proficient	#N/A	#N/A	#N/A	34.8	49.1
Advanced	#N/A	#N/A	#N/A	28.3	18.2



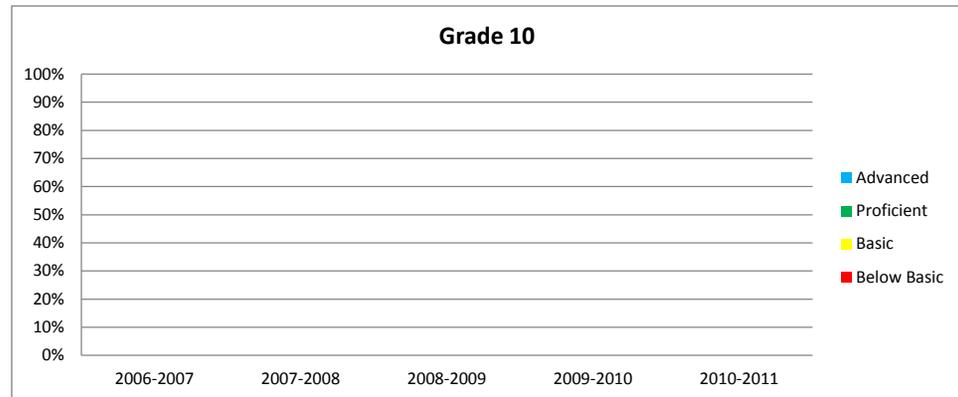
Math Grade 7	2006-2007	2007-2008	2008-2009	2009-2010	2010-2011
Below Basic	#N/A	#N/A	#N/A	24	14
Basic	#N/A	#N/A	#N/A	32	27.9
Proficient	#N/A	#N/A	#N/A	24	27.9
Advanced	#N/A	#N/A	#N/A	20	30.2



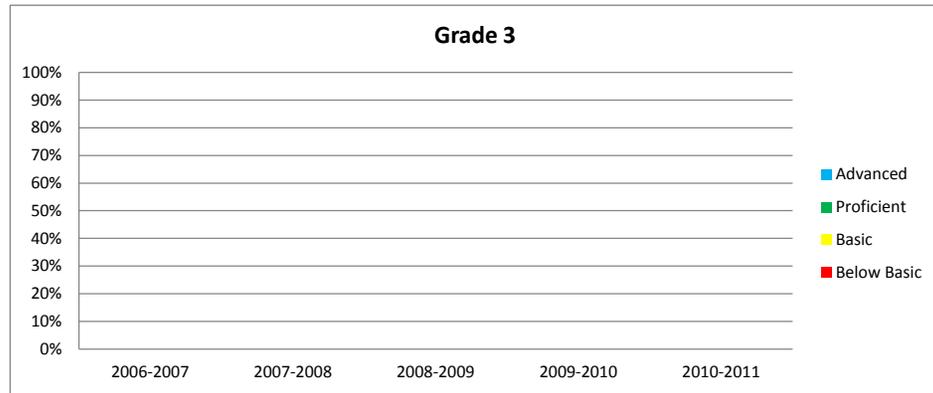
Math Grade 8	2006-2007	2007-2008	2008-2009	2009-2010	2010-2011
Below Basic	#N/A	#N/A	#N/A	18.2	0
Basic	#N/A	#N/A	#N/A	18.2	31.3
Proficient	#N/A	#N/A	#N/A	31.8	50
Advanced	#N/A	#N/A	#N/A	31.8	18.8



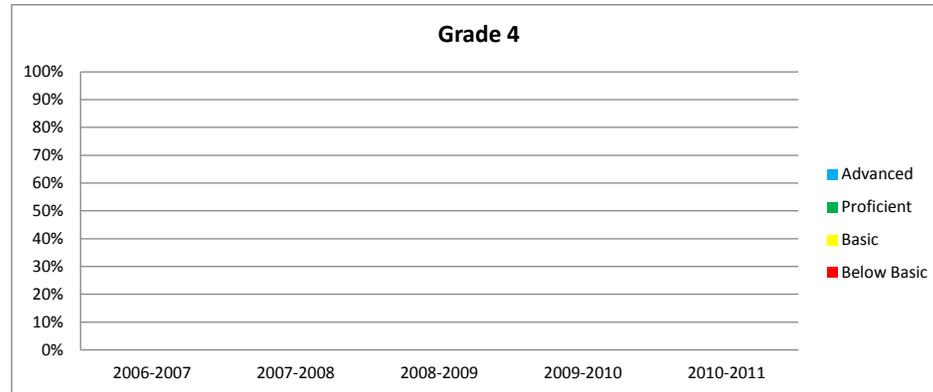
Math Grade 10	2006-2007	2007-2008	2008-2009	2009-2010	2010-2011
Below Basic	#N/A			#N/A	#N/A
Basic	#N/A			#N/A	#N/A
Proficient	#N/A			#N/A	#N/A
Advanced	#N/A			#N/A	#N/A



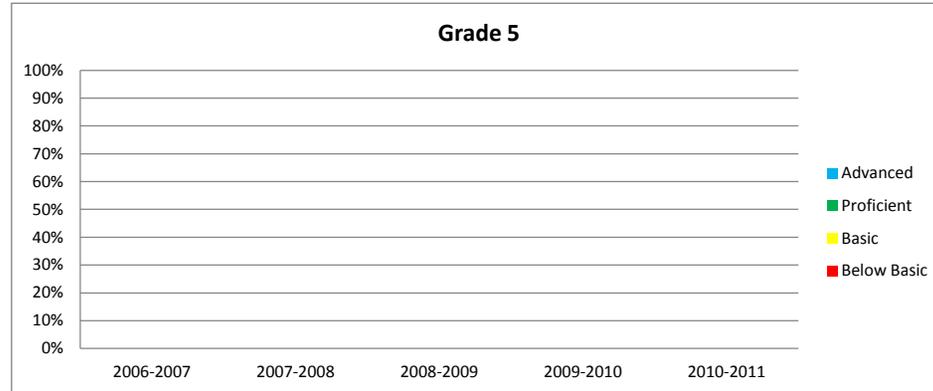
Language Grade 3	2006-2007	2007-2008	2008-2009	2009-2010	2010-2011
Below Basic	#N/A	#N/A	#N/A	#N/A	#N/A
Basic	#N/A	#N/A	#N/A	#N/A	#N/A
Proficient	#N/A	#N/A	#N/A	#N/A	#N/A
Advanced	#N/A	#N/A	#N/A	#N/A	#N/A



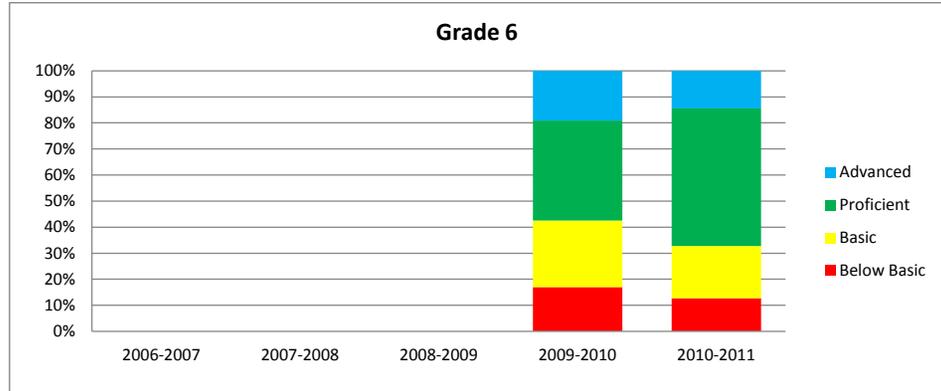
Language Grade 4	2006-2007	2007-2008	2008-2009	2009-2010	2010-2011
Below Basic	#N/A	#N/A	#N/A	#N/A	#N/A
Basic	#N/A	#N/A	#N/A	#N/A	#N/A
Proficient	#N/A	#N/A	#N/A	#N/A	#N/A
Advanced	#N/A	#N/A	#N/A	#N/A	#N/A



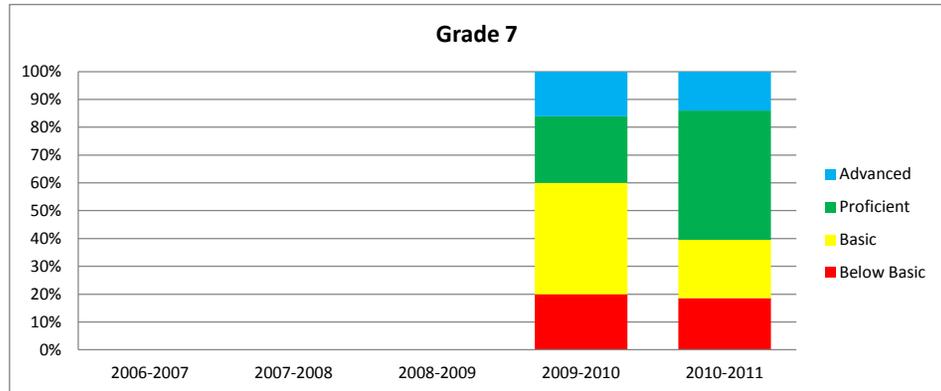
Language Grade 5	2006-2007	2007-2008	2008-2009	2009-2010	2010-2011
Below Basic	#N/A	#N/A	#N/A	#N/A	#N/A
Basic	#N/A	#N/A	#N/A	#N/A	#N/A
Proficient	#N/A	#N/A	#N/A	#N/A	#N/A
Advanced	#N/A	#N/A	#N/A	#N/A	#N/A



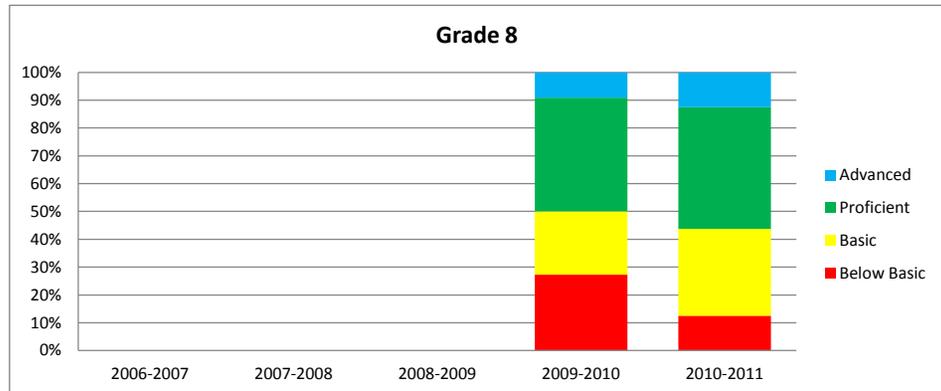
Language Grade 6	2006-2007	2007-2008	2008-2009	2009-2010	2010-2011
Below Basic	#N/A	#N/A	#N/A	17	12.7
Basic	#N/A	#N/A	#N/A	25.5	20
Proficient	#N/A	#N/A	#N/A	38.3	52.7
Advanced	#N/A	#N/A	#N/A	19.1	14.5



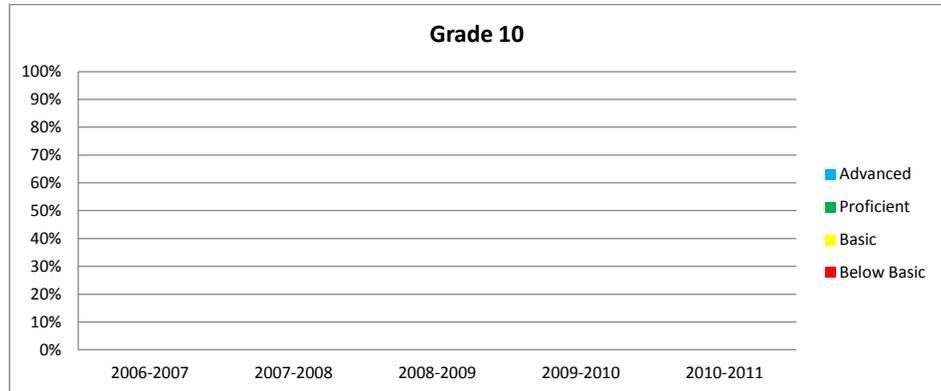
Language Grade 7	2006-2007	2007-2008	2008-2009	2009-2010	2010-2011
Below Basic	#N/A	#N/A	#N/A	20	18.6
Basic	#N/A	#N/A	#N/A	40	20.9
Proficient	#N/A	#N/A	#N/A	24	46.5
Advanced	#N/A	#N/A	#N/A	16	14



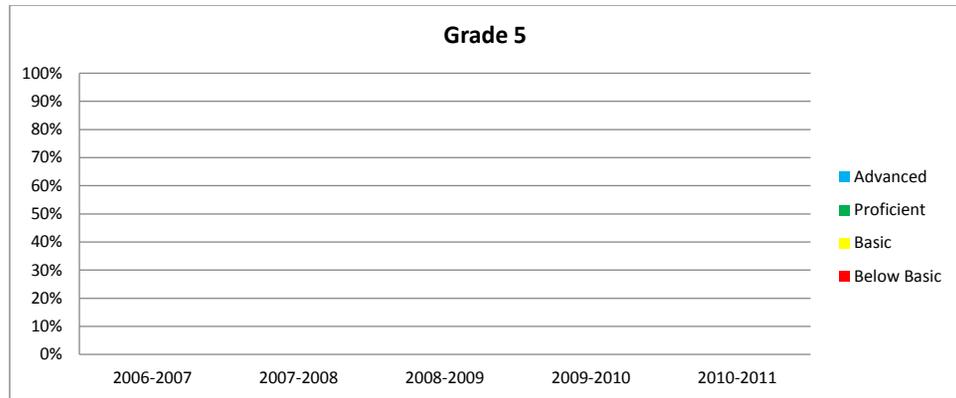
Language Grade 8	2006-2007	2007-2008	2008-2009	2009-2010	2010-2011
Below Basic	#N/A	#N/A	#N/A	27.3	12.5
Basic	#N/A	#N/A	#N/A	22.7	31.3
Proficient	#N/A	#N/A	#N/A	40.9	43.8
Advanced	#N/A	#N/A	#N/A	9.1	12.5



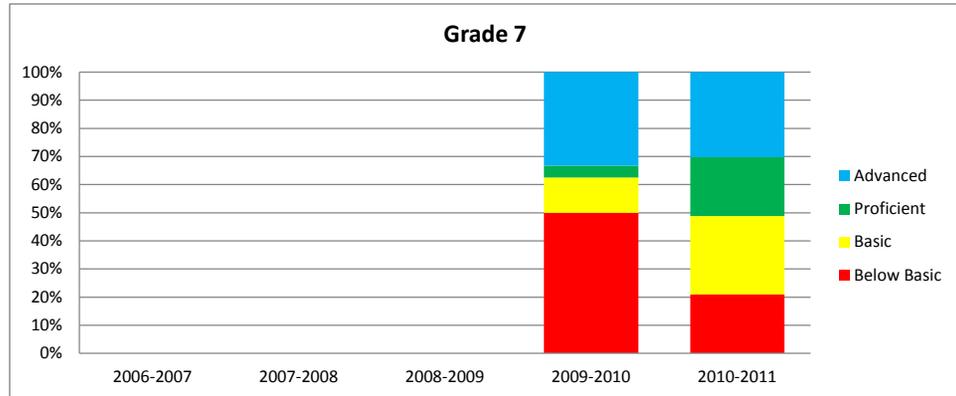
Lang. Grade 10	2006-2007	2007-2008	2008-2009	2009-2010	2010-2011
Below Basic	#N/A			#N/A	#N/A
Basic	#N/A			#N/A	#N/A
Proficient	#N/A			#N/A	#N/A
Advanced	#N/A			#N/A	#N/A



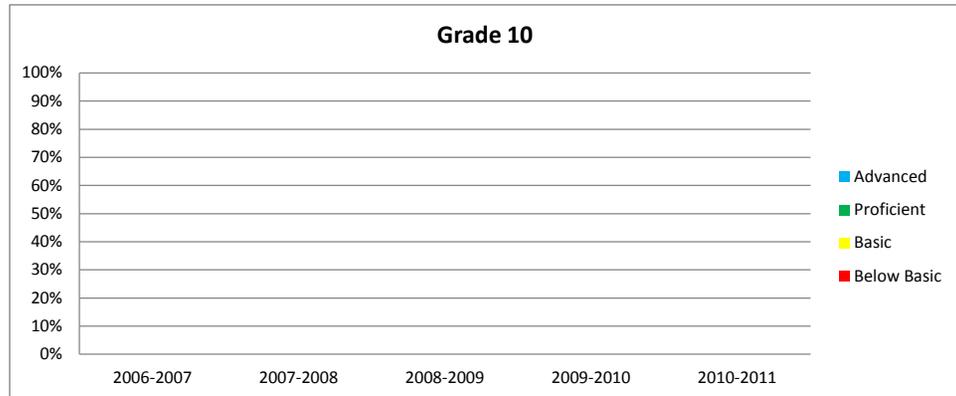
Science Grade 5	2006-2007	2007-2008	2008-2009	2009-2010	2010-2011
Below Basic	#N/A	#N/A	#N/A	#N/A	#N/A
Basic	#N/A	#N/A	#N/A	#N/A	#N/A
Proficient	#N/A	#N/A	#N/A	#N/A	#N/A
Advanced	#N/A	#N/A	#N/A	#N/A	#N/A



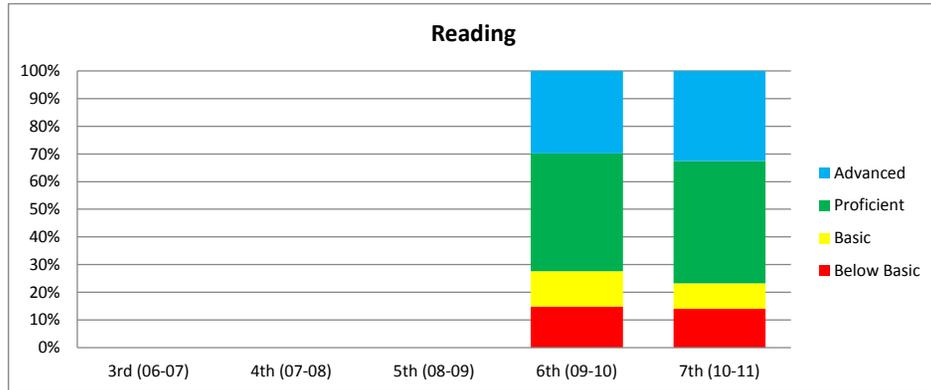
Science Grade 7	2006-2007	2007-2008	2008-2009	2009-2010	2010-2011
Below Basic	#N/A	#N/A	#N/A	50	20.9
Basic	#N/A	#N/A	#N/A	12.5	27.9
Proficient	#N/A	#N/A	#N/A	4.2	20.9
Advanced	#N/A	#N/A	#N/A	33.3	30.2



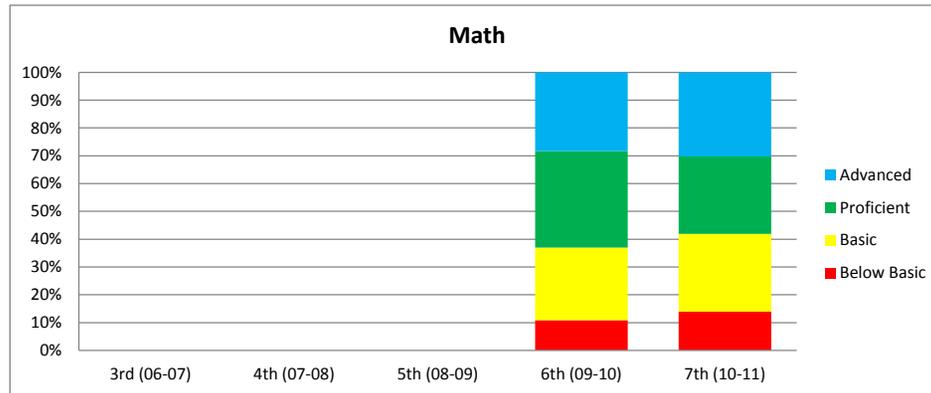
Science Grade 10	2006-2007	2007-2008	2008-2009	2009-2010	2010-2011
Below Basic	#N/A	#N/A		#N/A	#N/A
Basic	#N/A	#N/A		#N/A	#N/A
Proficient	#N/A	#N/A		#N/A	#N/A
Advanced	#N/A	#N/A		#N/A	#N/A



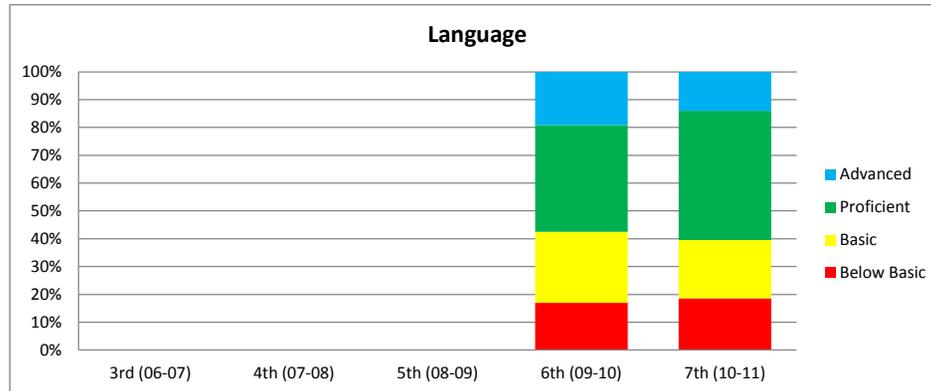
Class of 2015	3rd (06-07)	4th (07-08)	5th (08-09)	6th (09-10)	7th (10-11)
Below Basic	#N/A	#N/A	#N/A	14.9	14
Basic	#N/A	#N/A	#N/A	12.8	9.3
Proficient	#N/A	#N/A	#N/A	42.6	44.2
Advanced	#N/A	#N/A	#N/A	29.8	32.6



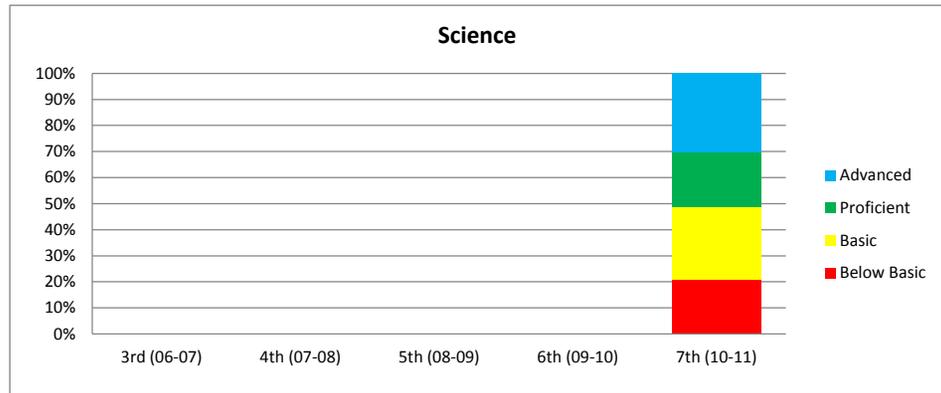
Class of 2015	3rd (06-07)	4th (07-08)	5th (08-09)	6th (09-10)	7th (10-11)
Below Basic	#N/A	#N/A	#N/A	10.9	14
Basic	#N/A	#N/A	#N/A	26.1	27.9
Proficient	#N/A	#N/A	#N/A	34.8	27.9
Advanced	#N/A	#N/A	#N/A	28.3	30.2



Class of 2015	3rd (06-07)	4th (07-08)	5th (08-09)	6th (09-10)	7th (10-11)
Below Basic	#N/A	#N/A	#N/A	17	18.6
Basic	#N/A	#N/A	#N/A	25.5	20.9
Proficient	#N/A	#N/A	#N/A	38.3	46.5
Advanced	#N/A	#N/A	#N/A	19.1	14



Class of 2015	3rd (06-07)	4th (07-08)	5th (08-09)	6th (09-10)	7th (10-11)
Below Basic	#N/A	#N/A	#N/A	#N/A	20.9
Basic	#N/A	#N/A	#N/A	#N/A	27.9
Proficient	#N/A	#N/A	#N/A	#N/A	20.9
Advanced	#N/A	#N/A	#N/A	#N/A	30.2



Idaho Science and Technology Charter School January 5, 2012	Proposed (Board Approved Budget for Fiscal Year)	Actual (Through Most Recent Month End)	Projected (Anticipated Year-End Numbers)	Percentage Used (Actual / Proposed)	Notes
REVENUE					Based on 194 confirmed enrollment as of July 1,2011
Salary Apportionment	\$651,126.00	\$435,442.00	\$651,126.00	66.88%	from SBA formula
Benefit Apportionment	\$111,667.00	\$52,254.00	\$111,667.00	46.79%	from SBA formula
Entitlement	\$274,764.00	\$183,459.92	\$274,764.00	66.77%	based on 14.2 units as calculated by SDE formula
State Transportation	\$33,200.00	\$14,096.45	\$33,200.00	42.46%	
Lottery	\$7,500.00	\$11,148.00	\$7,500.00	148.64%	
Other State Funds (Specify)	\$22,800.00	\$22,800.00	\$22,800.00	100.00%	includes remediation funds.
Special Ed - Regular	\$26,706.00		\$26,706.00	0.00%	
Special Ed - ARRA	\$0.00		\$0.00	#DIV/0!	
Title I	\$28,500.00		\$28,500.00	0.00%	approval pending
Federal Title I Funds : ARRA	\$0.00		\$0.00	#DIV/0!	
Medicaid Reimbursement	\$0.00		\$0.00	#DIV/0!	
Title IIA	\$0.00		\$0.00	#DIV/0!	
Local Revenue (Specify)	\$2,000.00	\$1,152.18	\$2,000.00	57.61%	
Federal Startup Grant				#DIV/0!	
Other Grants (Specify)				#DIV/0!	
Fundraising				#DIV/0!	
Interest Earned	\$200.00	\$109.45	\$200.00	54.73%	
Other (Specify)				#DIV/0!	
Other (Specify)				#DIV/0!	Carry-over
TOTAL REVENUE	\$1,158,463.00	\$720,462.00	\$1,158,463.00	62.19%	
EXPENDITURES					
100 Salaries					
Teachers	\$366,962.00	\$197,498.40	\$366,962.00	53.82%	includes IT/networking consultant
Special Education	\$31,500.00	\$18,987.32	\$31,500.00	60.28%	
Instructional Aides	\$6,000.00	\$3,821.54	\$6,000.00	63.69%	
Classified/Office	\$12,210.00	\$8,107.33	\$12,210.00	66.40%	
Administration	\$95,000.00	\$57,950.01	\$95,000.00	61.00%	
Maintenance	\$36,000.00	\$17,889.72	\$36,000.00	49.69%	1 FT maintenance/custodial and 1 PT custodial positions
Other (Specify)	\$41,000.00	\$19,162.90	\$41,000.00	46.74%	bus drivers
Other (Specify)	\$31,500.00	\$19,051.21	\$31,500.00	60.48%	title 1 teacher
Total Salaries	\$620,172.00	\$342,468.43	\$620,172.00	55.22%	
200 Employee Benefits					
PERSI/FICA/Benefits	\$75,870.00	\$40,221.70	\$75,870.00	53.01%	
Other (Specify)	\$89,730.00	\$47,556.90	\$89,730.00	53.00%	health insurance benefits
Total Benefits	\$165,600.00	\$87,778.60	\$165,600.00	53.01%	
300 Purchased Services					
Management Services				#DIV/0!	
Staff Dev/Title IIA	\$0.00		\$0.00	#DIV/0!	costs included in teacher contracts
Legal Pub/Advertising	\$230.00	\$409.70	\$230.00	178.13%	
Legal Services	\$0.00		\$0.00	#DIV/0!	
Special Education	\$4,200.00	\$2,838.97	\$4,200.00	67.59%	Speech and Occupational therapy
Liability & Property Ins	\$11,500.00	\$7,975.99	\$11,500.00	69.36%	
Substitute Teachers	\$3,300.00	\$1,096.78	\$3,300.00	33.24%	
Board Expenses	\$500.00	\$0.00	\$500.00	0.00%	
Computer Services	\$0.00	\$1,265.30	\$0.00	#DIV/0!	IT consultant/network admin expenses
Transportation	\$700.00	\$334.02	\$700.00	47.72%	bus driver training
Travel	\$2,200.00	\$1,937.22	\$2,200.00	88.06%	estimated 3 trips to Boise, 2 to Twin Falls
Other (Specify)	\$0.00		\$0.00	#DIV/0!	
Other (Specify)	\$0.00		\$0.00	#DIV/0!	
Total Services	\$22,630.00	\$15,857.98	\$22,630.00	70.08%	
Facilities					
Building Lease	\$184,248.00		\$184,248.00	0.00%	FY12 lease payments to Idaho Science and Technology Development Inc. (Hogan Contractors)
Land Lease	\$0.00		\$0.00	#DIV/0!	
Modular Lease	\$0.00		\$0.00	#DIV/0!	
Utilities, Phones, Lndscp	\$19,500.00	\$13,673.29	\$19,500.00	5.62%	

Site Preparation	\$0.00		\$0.00	#DIV/0!	
Other (Specify)				#DIV/0!	
Other (Specify)				#DIV/0!	
Total Facilities	\$203,748.00	\$13,673.29	\$203,748.00	6.71%	
400 Supplies and Maintenance					
Textbooks	\$4,000.00	\$4,411.93	\$4,000.00	110.30%	
School Supplies	\$24,000.00	\$20,711.83	\$24,000.00	86.30%	instructional consumables and supplies
Power School				#DIV/0!	
Custodial Supplies	\$11,100.00	\$5,351.67	\$11,100.00	48.21%	cleaning and maintenance supplies
Other (Specify)	\$19,000.00	\$7,856.70	\$19,000.00	41.35%	pupil transportation supplies
Other (Specify)				#DIV/0!	
Total Supplies	\$58,100.00	\$38,332.13	\$58,100.00	65.98%	
500 Capital Objects					
Furniture				#DIV/0!	
Technical AV Equipment				#DIV/0!	
Other (Specify)	\$6,750.00	\$6,676.00	\$6,750.00	98.90%	purchase of 2 classroom modular unit
Other (Specify)				#DIV/0!	
Other (Specify)				#DIV/0!	
Other (Specify)				#DIV/0!	
Total Capital Objects	\$6,750.00	\$6,676.00	\$6,750.00	98.90%	
Debt Service					
Specify	\$35,760.00	\$11,823.52	\$35,760.00	33.06%	Bank of Idaho loan initiated in 2009
Specify				#DIV/0!	
Specify				#DIV/0!	
Total Debt Service	\$35,760.00	\$11,823.52	\$35,760.00	33.06%	
Grant Purchases					
Specify				#DIV/0!	
Specify				#DIV/0!	
Specify				#DIV/0!	
Specify				#DIV/0!	
Specify				#DIV/0!	
Total Grant Purchases	\$0.00	\$0.00	\$0.00	#DIV/0!	
Reserve Fund				#DIV/0!	
Building Fund				#DIV/0!	
Total Expenses	\$1,112,760.00	\$516,609.95	\$1,112,760.00	46.43%	
Carryover from Previous FY	\$16,070.00	\$16,070.00	\$16,070.00	100.00%	
Reserve/(Deficit)	\$61,773.00	\$219,922.05	\$61,773.00	356.02%	

Idaho Science and Technology Charter School FY 13	Proposed Budget	Notes		
REVENUE		based on enrollment of 225 students, 75 per grade		
Local Revenue	\$2,200.00			
State Revenue				
Entitlement	\$314,016.00	16.4 units as calculated by SDE formula		
Wages				
Administration	\$48,430.00	Based on SDE formula for FY13		
Teachers	\$765,166.00	Based on SDE formula for FY13		
Classified	\$67,120.00	Based on SDE formula for FY13		
Medicaid				
Benefit	\$111,668.00	Based on SDE formula for FY13		
Transportation	\$44,200.00			
Federal Revenue				
Title I	\$18,000.00			
Special Ed	\$38,000.00			
Title II				
Startup Grant				
Other Sources (Specify)				
Other Sources (Specify)				
Other Sources (Specify)				
Total Revenue before holdback	\$1,408,800.00			
PROPOSED HOLDBACK		Holdbacks should be estimated at a minimum of 5% - 5.5% for FY 2011.		
Teacher Salaries				
Classified Salaries				
Admin Salaries				
Benefits				
Entitlement				
Transportation				
Total Holdback	\$0.00			
Total Revenue after holdback	\$1,408,800.00			
EXPENDITURES				
100 Salaries				
Teachers	\$429,112.00			
Admin	\$100,000.00			
Classified	\$43,800.00			
Special education	\$31,500.00			
Other (Specify)	\$31,500.00	title I teacher		
Other (Specify)	\$45,600.00	bus drivers		
Total Salaries	\$681,512.00			
200 Benefits				
Benefit Dollars				
PERSI/Payroll taxes	\$82,216.00			
Other (Specify)	\$132,658.00			
Total Benefits	\$214,874.00			
300 Purchased Services				
Transportation	\$780.00	new driver training		
Special Education	\$4,400.00			
Proctor costs				
Legal				
Insurance	\$16,800.00			
Copier Lease	\$2,600.00			
Printer Lease				
Facility Lease	\$320,000.00			
Utilities	\$23,100.00			
Professional Development				
Technology				
Management Services				
Legal Publications/Advertising	\$1,200.00			

February 9, 2012

UPCOMING FISCAL YEAR BUDGET COMPARISON

Substitute Teachers	\$4,500.00			
Board Expenses	\$600.00			
Other (Specify)				
Other (Specify)				
Total Purchased Services	\$373,980.00			
Supplies & Materials				
Teacher/Classroom	\$21,000.00			
Office	\$2,200.00			
Janitorial	\$1,500.00			
Textbooks	\$2,100.00			
Other (Specify)	\$3,300.00	bus and transportation supplies		
Other (Specify)				
Total Supplies & Materials	\$30,100.00			
Grant Expenditures				
Specify				
Specify				
Specify				
Total Grant Expenditures	\$0.00			
Capital Outlay				
Total Capital Outlay	\$0.00			
Debt Retirement				
Total Debt Retirement	\$96,000.00			
Insurance & Judgements				
Total Insurance & Judgements	\$0.00			
Transfers				
Total Transfers	\$0.00			
Contingency Reserve	\$0.00			
Building Fund	\$0.00			
Total Expenditures	\$1,396,466.00			
Carryover from Previous FY	\$61,773.00	Reflects projected reserve/(deficit) from "current year" worksheet		
Reserve/(Deficit)	\$74,107.00			

ISTCS Site Visit Report

10/19/2011

Interview with Board Members:

Two members of ISTCS board participated in the interview. They had some difficulty articulating the mission of the school but understand that it provides up to date technology and skills that can be used later in life. The students are given more than the basics; thus they feel the mission is being fulfilled. The board consists of a parent, engineer, lawyer, and former mayor among others. As such, the board feels they have a good variety of experience and knowledge that is an asset to governing the school. Board members feel they function well as a group and are all "on the same page." The administration is viewed by the board as easy to work with and effective. They feel that the board, administration, and teachers work as a team. Annual administrator evaluations are completed.

The board describes the financial stability of the school as good because of enrollment numbers. The facility is meeting the needs of the school but with anticipation of a bigger eighth grade next year, more room will be needed. The school has a very active parent organization and student council.

According to board members, their strengths include having a common vision and goals, and their life experiences. They feel they need more training. A trainer was brought in to work with the board. The experience was valuable. The board expressed that traveling to Boise for training is difficult because of time and money constraints. PCSC staff suggested they look for online materials and webinars that could be useful in providing additional training. Parent attendance at board meetings has been poor. The board would like to improve this. They have not yet established committees or elicited volunteers to participate in board meetings and explore school issues. It was suggested that this may improve attendance at meetings as well as provide a pool of future recruits for board members.

Marketing plans for the school seem somewhat weak. This has not been a priority as enrollment is high. There has been some newspaper coverage of the school. One board member acts as a public relations representative. This person recently resigned so the board is in the process of replacing the representative. Word of mouth has been a powerful marketing tool that resulted in increased enrollment this year.

The board expressed the concern that they feel distanced from Boise and lack information and training opportunities. They appreciate the site visit and feedback, especially at the beginning of the year so they have time to make corrections and changes.

Interview with Business Manager:

The business manager is responsible for both BCCLC and ISTCS. She has a heavy workload. BCCCLC indicated they are looking into hiring a second person to help with business responsibilities. She feels her training is adequate but it is difficult to keep up on changes. Furthermore, it is difficult for her travel to Boise for training. She has developed a collaborative group of business managers from surrounding schools that share expertise and knowledge.

February 9, 2012

Current enrollment is 195 with a wait list of 34. The school plans to increase enrollment next year to 225. Modular classrooms have been purchased to accommodate growth. Transportation costs will increase due to higher enrollment. Transportation is shared with BCCLC. ISTCS describes having a high percent of special needs students thus; the costs for services are high. They are in the process of submitting claims to Medicaid for reimbursement. They anticipate the reimbursement to be rather small. It is anticipated that staff will increase by one or two positions next year, increasing salary expenditures. Current year end reserve is estimated to be approximately \$61,000.

Currently, the building is being leased from the builder. The school plans to purchase the building next year by obtaining a USDA loan and a loan from a local bank. They are quite confident the loans will be approved due to initial verification they meet criteria and have established working relationships with the lenders. The lease can be continued if necessary.

Interview with Administrator:

The Principal and Vice Principal participated in the site visit interview. They articulated the mission of the school as infusing science and technology into the curriculum with a focus on creating a whole program. Group work and small class sizes are emphasized. Meaningful language experiences are provided through music, drama, and perspectives classes where students apply literary concepts to other disciplines. Spanish instruction is provided. Science is based on hands on and technology activities. PITSCO is used as part of the Science curriculum. It is a hands-on career based program that offers 12 stations with individual learning goals for each grade.

The technology requirements as set forth in the charter are met through state of the art computer labs. One lab consists of desktop computers while the other one uses lap top computers. There is about a 3:1 ratio of students to computers in the school. Each classroom contains a smart board. Students are required to take a full year of Science and half a year of technology or computers, with the option to extend these classes to a full year. Each day students spend approximately three and one half hours working on Science, technology, math, and computers. The cloud is a recent addition to the technology component of the school. It allows the school to function without a centralized server. The cloud acts as the school's server and is maintained by Google docs. Teachers also have access to Notebook 10.

ISTCS has developed partnerships with several local businesses. INL visits the school to make presentations, students take field trips to local businesses, local law enforcement provides presentations, an author recently visited the school to teach about the writing process, and partnering with Spudnick is in process. These partnerships along with the PITSCO curriculum allow students to explore many career opportunities.

The school has an RTI model in place and uses AIMSWEB for monitoring progress. They have implemented the middle level credit system and all teachers, with the exception of one are highly qualified. AYP was missed last year because of Math scores. The staff is concentrating on analyzing data to find gaps in the curriculum and trends that will identify ways to reach students. They believe they have found a gap in the data analysis strand. Efforts to improve math scores include adding additional

math classes including a lower and higher level class with 2 teachers, arranging for two Para professionals to work with IEP students all day, and purchasing a math curriculum for those students with very low math skills. District and State ISAT comparisons reveal that ISTCS students are performing below the state average in all subjects at all grade levels. In sixth grade ISTCS students are performing the same as or above district levels in all subjects. Seventh grades scores for all subjects are slightly above district scores, Science scores are significantly above district scores. Eighth grade students are performing below the district in Reading and Language Arts and slightly above in Math.

A recent challenge for the school has been technology problems. Their server went out as well as having difficulties with an IT staff member. These problems have been addressed and the school is recovering. Additionally, the transition to the cloud has been a challenge as ISTCS is a pioneer in applying this technology in an educational setting.

Administration believes the measureable student education standards need to be revised and amended. Number 1 requires that 80% of students earn a satisfactory grade in Math, Language Arts, and Science based on classroom assessment. The school considers a grade of C to be passing. According to this standard 79% of the students have satisfactory grades. MSES number 2 requires 85% of students to demonstrate technological competency by scoring at least 80% on their technology portfolio. This MSES has been met. The school has also met MSES 3 with 90% of sixth graders scoring satisfactory on their career research project. It is unclear if MSES 4 and 5 have been met because they refer to parts of the curriculum which no longer apply. Part of MSES 6 refers to achievement related to the DMA and DWA. These tests no longer exist. The other part of MSES 6 sets the standard of 80% of students scoring proficient or above on ISAT tests. The school did not meet this requirement. 72.7% of students were proficient in Language Arts and 79.9% in Math.

Strengths:

- Dedicated staff, board, and administration
- Access to technology
- Technological advances
- PITSCO curriculum
- Professional development opportunities on Fridays
- Business and school partnerships
- High enrollment
- RTI model in place with AIMSWEB progress monitoring

Concerns:

- Not meeting AYP in Math
- MSES not met – need revision
- Charter states that a comprehensive program of community service will be provided – still being developed
- Gifted and talented plan written but currently in revision phase

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- No written EL plan is developed
- One teacher needs to become HQ
- Charter states that one teacher will be employed for every 20 students – compliance is questionable
- Charter states ISTCS will participate in the National School Lunch Program – not in compliance
- Board may not understand they are ultimately responsible to the Commission

Possible Amendments:

- Measurable Student Education Standards
- Community service statements
- Teacher to student ratio
- National School Lunch Program participation
- Consolidation with BCCLC

Recommendations:

- Amend charter as soon as possible
- Continue to analyze data and use it to drive instruction
- Ensure you have a plan of improvement for meeting AYP and MSES
- Develop and implement a marketing plan
- Develop and implement a written EL program
- Complete revision of Gifted and Talented Program
- Ensure all teachers are HQ
- Proceed with caution as you explore consolidation – check with State Department for technical assistance on procedures and requirements

Materials Requested:

- Actual teacher to student ratios
- Update on sale of 3 acre parcel of land (from March 2011 PCSC meeting)

SUBJECT

DaVinci Charter School Annual Update

APPLICABLE STATUTE, RULE, OR POLICY

IDAPA 08.02.04.301.03

BACKGROUND

DaVinci Charter School (DaVinci), formerly Garden City Community School, is a K-8 public charter school authorized by the Public Charter School Commission (PCSC). The school has operated in Garden City since 2006.

DISCUSSION

DaVinci will provide an annual update on the status of the school. Staff has reviewed the materials submitted by the school and makes the following observations:

DaVinci currently enrolls 137 students and has a waiting list of 6 students. Student attrition is 30%, a high rate the school reports is due largely to family employment issues. DaVinci school plans to increase enrollment next year by offering morning and afternoon kindergartens with 20 students each.

The school did not make AYP in 2011. They are on alert status for language scores, math is in not met for 3rd year status, and reading scores are considered not met for the 1st year.

Additionally, DaVinci's measurable student educational standards (MSES) were not met for a second year. In February 2011, a corrective action plan submitted in response to a notice of defect issued on the grounds of failure to meet MSES, DaVinci submitted proposed amendments to this section of the charter. Due to a miscommunication, the school believed these proposed amendments to be approved, while PCSC staff believed that they were not eligible for approval because they had not yet gone through the sufficiency review and the proposed amendment was not submitted to the PCSC in legislative format rather than as a CAP. For this reason, these materials provide a comparison of the schools 2011 results to both the original and the proposed amended standards.

The first, original standard requires 85% of students in grades 1, 2, and 3 to achieve grade level scores on the IRI. Spring IRI scores reveal that 50% of first graders, 38% of second graders, and 80% of third graders achieved grade level scores; therefore, the standard was not met.

Similarly, DaVinci's ISAT language and math scores did not meet the second, original standard.

The proposed, amended MSES and actual results in comparison thereto are detailed in the Goals Attainment Report included with these materials. The first, proposed standard was in Kindergarten and third grade, but not first or second. The second, proposed standard was not met in language or math across most grade levels.

As detailed above, DaVinci has failed to meet its MSES, regardless of the version under consideration. Additionally, longitudinal comparisons fail to show consistent improvement in test scores. It should be noted that the school's small enrollment in certain grades magnifies the impact of each student's scores on the percentages used to compare results. DaVinci Charter School has implemented several changes, detailed in these materials, to help raise student achievement.

Parent survey results indicate general overall satisfaction with the school. However, about 20% of parents feel that expectations could be clearer, students need to be challenged more, and communication could be better. 31% do not feel that struggling students receive early intervention or additional help. 39% feel that students at the school are not well behaved.

DaVinci's financial outlook has improved. The FY11 audit documents a carryover of \$59,000. Current and upcoming year projections are also positive.

IMPACT

Pursuant to I.C. 33-5209(3) and IDAPA 08.02.04.301.04, the public charter school must "comply with the terms and conditions of the corrective action plan and...cure the defect at issue within a reasonable time..." If the public charter school fails to comply with the plan and cure the defect, "the authorized chartering entity may provide notice to the public charter school of its intent to revoke the charter."

If the PCSC determines that the school has failed to cure an identified defect within a reasonable period of time, the PCSC may issue a notice of intent to revoke the charter.

STAFF COMMENTS AND RECOMMENDATIONS

Staff recommends that the PCSC consider whether DaVinci has failed to cure within a reasonable period of time the identified defect of failure to substantially meet any of the student educational standards identified in the approved charter.

COMMISSION ACTION

Any action would be at the discretion of the PCSC.

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CHARTER SCHOOL DASHBOARD

Date: 12/12/11

School Name: DaVinci Charter School

School Address: 5655 W Glenwood St, Boise, ID 83714 (Garden City)

School Phone: 377-0011

Current School Year: 2011-2012

School Mission: DaVinci Charter School exists to provide a responsive, dynamic educational experience by placing the learner at the center; to evolve to meet the challenges of a changing world; and to serve a broad range of community needs. Through democratic principles and experience-proven practices, we foster responsibility, respect, responsiveness, and resourcefulness among all learners.

CHARTER SCHOOL BOARD

Board Member Name	Office and Term	Skill Set(s)	Email	Phone
Laurel York Odell	President (08-11/extended to 2012)	organizational development consultant	laurelyo@cableone.net	(208) 859-8271
Tim Richey	Treasurer (09-12)	accounting	timothyrichey@gmail.com	(208) 921-4717
Matthew Shapiro	Secretary(08-11/extended to 2012)	educational philosopher, business entrepreneur	mshapiro21@gmail.com	(208) 246-0025
Michael Tetraul	parent rep(09-12)	science teacher	mtetrault@cableone.net	(208) 761-1317
Andrea Deardon Holmes	parent rep(2011-14)	public relations	andreadeardon@gmail.com	(208) 870-7837
The board is currently seeking 2 more members to fill the skill sets and positions of one board member who passed away this past year and another one who had to quite due to health challenges.				

ENROLLMENT

Grade Level	Current Enrollment	Current ADA	Current Waiting List	Previous Year's Enrollment	Previous Year's ADA

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K	22	20.58	4	18	19.2
1	19		0	16	
2	17		0	18	
3	20	53.32	0	12	52.56
4	19		0	16	
5	17		0	8	
6	9	95.17	2	15	39.40
7	8		0	7	
8	6	13.43	0	11	19.41
9					
10					
11					
12					
TOTAL	137(Dec 2011)	129.18(Nov 2011)	6	121 (June 2011)	130.57(end of year 2011)

Student Attrition Rate: 33% turnover in 2010-11

Is your school planning to increase or decrease enrollment opportunities for the upcoming school year? increase
If yes, briefly describe planned enrollment changes, including numbers and grades affected:

We plan to have both an AM and PM kindergarten class with 20 students in each class.

We are planning a student recruitment campaign prior to our March lottery to cap all current classes and create a waiting list. Our new location has already begun to attract more families and if we can finalize building plans, we feel responses already shown will definitely create a waiting list to ensure classes stay full.

STUDENT DEMOGRAPHICS

School Year	Hispanic (# and %)	Asian (# and %)	White (# and %)	Black (# and %)	American Indian (# and %)	LEP (# and %)	FRL (# and %)	Special Education (# and %)
Current	5 -4%	2-1%	122 - 89%	4 - 3%	2 - 1%	2 - 1%	73 - 53%	24 - 18%
Previous	7-5%	3-2%	126-90%	4-3%	0	3-2%	74-53%	24-17%

FACULTY AND STAFF

Administrator Name(s): Cindy Hoovel

Administrator's Hire Date: July 2007

Administrator Email(s): cindy.hoovel@davincicharterschools.org

Current Classified Staff (# FTE): 5.75

Classified Attrition Rate: 0

Current Faculty (# FTE): 9

Faculty Attrition Rate: 12% (represents one teacher leaving)

EDUCATIONAL PROGRAM

Did your school make AYP during the last school year? no

If no, please specify indicator and status: on alert in language, math goals not met/year 3, reading goals not met year 1

If no, please describe plan for addressing need:

NOTE:

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- 1) We have intensified our professional development to focus on gathering specific data to chart/review/analyze to determine students specific gaps.
- 2) Our School Improvement Team (includes admin, special services and teacher rep from each multi-age grouping collaboration team) has been accepted into the intensive RTI (Response to Intervention) training program.
- 3) Our SITeam attends all the SDE/BSU Specific Learning Disabilities trainings for the RTI Tiers and Learning Strategies/Interventions for reading and math.
- 4) We are currently applying for the new "Idaho Leads Project" since our Idaho Capacity Builders Grant is completed, but we'd like to continue intense mentorship to work towards continuous school improvement.

NOTE: Since our last Update to the Commission, the following has occurred:

- March 4 – No School/Professional Development Day – Screening and Assessment Development was given by Idaho Building Capacity coach, Joanie Peterson. Staff spent most of the time discussing at-risk students to develop our Response to Intervention Plan. The School Improvement team spent the afternoon developing a plan for K-8 Assessment Continuity to include in our RTI development for all school use to gather consistent academic data on each child. we are developing a handbook for all-school use.

- March 14 – Observation Protocol training (ICB grant) – Cindy attended this in Parma as the previous one had to be cancelled

- March 16 – School Net training - Michele & Wren attended. They will in turn train the rest of the staff on how to use the new data system the state is implementing once it's determined how it will be able to be used at our school.

- April 20 – Collaboration Series, part 2, presented for all schools by the Boise State School for Innovation and Improvement involved with the Idaho Capacity Builders project. Attended by our School Improvement Team- Angela, Brenda, Wren, Elizabeth and Cindy

- April 22 – Professional Development for all staff: Teaching staff worked in the computer lab documenting student assessment data into a new template created by 5/6 grade teacher, Ryan, to fit our school's unique philosophy versus the processes we had been trying to use that had been developed by the state. Everyone was impressed and thankful for all the hard work Ryan put into creating these very detailed data templates. These will be used to guide teachers' instruction as well as become a tool to show parents and students visual data to help them understand the academic progress of each student individually.

* School Improvement Team (Angela, Brenda, Wren, Elizabeth and I) have been meeting to use staff input/survey data, test results and school improvement training information to develop our future professional development plans. A Response to Intervention plan is being developed in written form to create a school manual for all staff to start using in the fall to create clarity and continuity for our academic and behavioral continuous improvement processes.

- Inservice prior to September school opening : Staff in-service prior to school starting included team building, building relationships with our neighbors and addressing internal issues prior to opening at our new location. Due to the needs to complete the move, the next two professional days were dedicated to collaboration with other teachers, lesson plans and a two hour Open House for families. Staff discussed and trained regarding our Response to Intervention plans as part of our school improvement process. Wren shared how to give the Words Our Way assessments which was chosen last spring to assess spelling K-8.

9/11 - hired part-time certified secondary math teacher to work with grades 5-8

9/22/11 – Staff Training in “Words Our Ways” spelling assessments by Wren

9/29/10 – Cindy visited Williamsburg Collegiate Charter School (grades 6-8)in Brooklyn, NY to observe methods they were using to improve state scores, student retention and encouraging future post-secondary education.

10/4/11 – Cindy and Joanie (IBC) conferenced regarding necessary school improvement academic plans

10/6/11- (Idaho Teacher In-Service Day) Using Title II Professional Development funds, all certified teachers attended the Idaho Arts Education Conference in Boise to learn more ideas to teach core subjects through arts integration effectively.

10/7/11 - (Idaho Teacher In-Service Day) Certified teachers used this day to collaborate with their teams in areas of: 1) student data review & analysis, 2) developing student RTI tier plans, 3) identifying professional development needs and planning for Family Goals Night and the upcoming year

10/14/11 – Angela & Cindy attended the state Federal Programs Conference in Boise

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•11/21-22/11: Family-Teacher Conferences (required): 93% attendance and remaining families have had make-up conferences so we are now at 99% participation. Good feedback given on this adjusted format to start the year as parents appreciated having 30 minutes with their child sharing their portfolios along with the teacher's total involvement to answer questions. We will have Student-Led Conferences in the spring.

•10/20/11 – School Improvement Team attended the SDE's RTI (Response to Intervention) training in Nampa (Wren, Elizabeth, Brenda, Angela & Cindy)

•10/24-25/11 – Cindy attended Superintendents' Network field trip to Canby, Oregon to research educational uses of technology at various cost levels (paid through grant)

•10/27/11 – Teaching staff training by School Improvement Team on RTI and the 3-tiers to identify each teachers' students' placement and needs

•11/3/11 – Danielson's Frameworks Training by Joanie Peterson good classroom teaching and observation skills to identify good practices for improvement and evaluations

•11/10/11 – DRA (Developmental Reading Assessment) Training by Wren for all staff involved with reading. (Huge thanks to her for all the work this took to prepare!)

•11/14/11 – School Improvement Team at Tier 2 Workshop (by SDE Special Education Dept) in Nampa

11/29/11: Pre-Legislative Charter School Meeting: Laurel & Cindy attended

12/1/11: Response to Intervention (RTI) Module Training, School Improvement Team (Angela, Elizabeth, Wren, Brenda & Cindy)

12/8/11: Cindy attended an excellent District III Superintendents Meeting titled: Superintendents as Instructional Leaders, by Nampa Supt Gary Larsen

January 2011: Director Cindy announced Wren Nicks will be Instructional Coach to assist her and lead the School Improvement Team. She will receive a stipend to cover her additional work to research and train staff. Se has been identified to have incredible experience in curriculum development - especially in the areas of curriculum guided by assessment, data and research-based best practices and curriculum/tests.

Was your school selected to participate in NAEP this year? no

REPORTING

Date of last programmatic operations audit? May 2011

Date submitted to authorizer? July 2011

Who performed your most recent programmatic audit? Idaho Charter School Network

Date of most recent fiscal audit? August 2011

Date submitted to authorizer? October 2011

COMMENTS

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

1) We relocated our school to a temporary location in modulars next to land where we are diligently working the develop the financial package in order to build in 2012. This was forced upon us after our landlord leased the spaces next to our kindergarten to a brewing company and a tactical firearms and decided not to renew our lease. We had to move the entire school into "pods" to be stored throughout the summer until we found and created a new facility during the summer!

2) Our school improvement team and RTI intervention greatly intensified working towards academic results required by the state test score and standard requirements while balancing with DaVinci educational philosophies. A majority of our staff's professional development and staff meetings have been dedicated to improvements in assessment tools, data collection and using this to develop specific interventions to help specific areas of our students' learning.

3) Policies created to meet new state education laws resulting from 2011 legislative session.

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

- 1) Finding a way to move from our negative landlord and facility location was a huge success!
- 2) Being invited to present our performance-based learning and assessment educational philosophies to the Idaho Board of Education during the legislative season.
- 3) An all-school final performance "Emergence: a celebration of our lives, learning and limitless potential" in which the students created their own skits, songs and dances - each were integrated with the standards they'd learned throughout their school year. Parents who own a production company helped create a stage, special lighting and sound affects to assist the students in an incredibly professional theater arts presentation - completely student driven!
- 4) We have a Town Hall meeting scheduled for Jan 25 to gather stakeholders opinions on what is needed to make DaVinci successful. This information - along with our annual parents satisfaction survey completed by the Center for Educational Effectiveness - will be used to develop an updated Strategic Plan for our next 3-5 years during our Feb 17, 2011
- 5) Our Parent Satisfaction Survey (using the Characteristics of High Performing Schools) showed us ranked with the top Washington Schools of Distinction and Idaho's Top 10% of high performing schools as measured by state reading and math assessments. (see survey "web" charts).

ADDITIONAL SUCCESS INFORMATION:

A HISTORY of SUCCESSES: Prepared as per banker's request to present to his superiors as part of our building finance project this year, September 21, 2011

It's all about the children...

as a community of learners and as individual learners through the integration of the arts and real-life experiences!

HISTORY

- 1) Prior to our current administrator, Cindy Hoovel, being hired in summer 2007, the school's original director had resigned and the school had received two letters of defect from the Idaho Public Charter School Commission (IPCSC): one for their financial situation and one for concerns that they were not following every educational and behavioral aspect stated in their original charter. The board developed a sound financial CAP (correction action plan) which was further tightened by Cindy and the board later in the year. Cindy developed a CAP to address the second letter which required some re-writing of the charter and highly focused staff professional development.
- 2) Commendations were received by the Idaho Charter Commission (IPCSC) in spring 2008 for completing all corrective action plan requirements stating they were impressed with the improvements – both financially and educationally. NOTE: Our district is considered a Title I school with 60% students at risk for various factors – usually financial and family situations.
- 3) Commendations were received by the IPCSC chairman and each commissioner individually in January 2011 following the administrator's presentation of our required school updates covering the past three years. They were specifically impressed with how far the school had come financially as they "didn't think the school could recover from the first year's financial challenges" and felt we had been very creative staying fiscally responsible while dealing with changes in state funding.
- 4) Through the IPCSC's recommendations, the administrator was invited by the Idaho Board of Education to present our school's educational philosophy and financial creativity during their Boise legislative session winter 2011. Commendations were received by the Board and State Education Superintendent, Tom Luna, regarding the school's performance-based learning methods (versus teaching students at computers only to be prepared for high stakes testing required by the state and federal government) and financial creativity.

- 5) Prior to the opening of the school in 2006, financial challenges arose regarding their potential facility so alternative arrangements were made in order to open the school and all original contracts were re-negotiated and paid off. The school has always met all financial obligations from the time it opened and are debt free.
- 6) Student enrollment was 89 when current administrator was hired. As of the start of the 2011-2012 school enrollment was at 160. When a permanent building can be started, we confidently project we will have full enrollment (200+) with a large waiting list!

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FINANCING

- 7) When our three years of federal Charter Starts grants (total of \$827,000) were completed (see financials from 2006-2009), we successfully made the lowered income adjustments through meetings with parents, teachers, students and the board to gain all stakeholders' feedback regarding budget cut ideas. Through months of meetings to give everyone an opportunity to be heard – and develop buy-in – The following were implemented:
- a. Students and staff decided to clean their own rooms and all areas of the school, so custodian contract was dropped: Savings: \$13,000/year
 - b. Our receptionist/secretary was rified (reduction in force) and in her place volunteer parents answered phones and greeted guests: Savings: \$ 22,000/year
 - c. Changed our lunch caterers to Boys & Girls Club who were trying to develop a business to coordinate with their development of a federal food program: Savings: \$39,000/year
 - d. Implemented a “backwards auction” during our annual school auction for attendees to donate money to be used for our curriculum field trips (which the state discontinued) : Additional Funds \$5600
 - e. Director substituted for teachers and safety monitors when necessary: Savings: \$2,000/year
 - f. Director taught the Art Studio sessions for each class and coordinated professional artists and events for two years until another grant could be written to re-hire a part-time art coordinator: Savings: \$12,000/year
 - g. We negotiated to lower our building lease costs during the 2010-2011 year: Savings: \$10,000/year
 - h. Parents chose to give \$50/trimester to help with costs of special programs – specifically the arts. Additional Funds \$20,000/year (cannot legally require this to be paid, so this varies, but is often higher)
 - i. All staff applies for at least two grants per year to cover special projects or trips
 - j. Small increase to our classroom caps for number of students allowed to enroll to enable us to receive more money through the state. We continue to have smaller classes than surrounding districts, though.
- 8) In order to learn to implement our unique educational and behavioral philosophies, our staff logged more professional development hours than any other school in Idaho.
- 9) The administrator brought in a bookkeeper she had known from another school district as a student aide until the appropriate time came to be able to hire her as the school's business manager to keep the books and manage technology needs for both staff and the Idaho Department of Education. This employee has attended all possible educational finances and technological trainings and has become an expert resource often called upon by other school districts.
- 10) No pay cuts or position cuts to staff in 2011-2012 and a 1% increase in 2010-2011 due to careful budgeting. Most districts cut all teachers salaries and many positions during this time.
- 11) Dave Evans Construction has partnered with DaVinci by allowing us to place modulars on their land, rent-free for our temporary location during the 2011-2012 school year while we continue to develop a financial package to enable us to build a permanent location.

12) The administrator negotiated with a modular building company to donate our administrative building, bathrooms and some ramps in order to afford the move to our current temporary location.

13) Through administrator's grant writing, we receive all possible federal grants to cover school improvement and special needs children.

14) A financial committee was developed in 2009 which includes the administrator, board treasurer, past board treasurer, school business manager and a community member who is an educational auditor. This group meets each month prior to board meetings to over see financials and make recommendations to the board as needed.

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OTHER

15) Received special commendations for our Special Education program the last two years

16) Received special commendations for our business manager's implementation of the new Idaho System for Educational Excellence data system

17) Continuous improvement on stakeholders' satisfaction survey data which is given each year to teachers, students and all parents. We have a 90% response result from families.

18) Partnerships with the community are very important and have included: Trey McIntyre Project, GC Chamber of Commerce, Rotary Club, St Luke's hospital, BSU and NNU arts programs and student teachers, local professional artists, Bells for Books, GC library, Boise Watershed (we are their pilot school for curriculum development), Shakespeare Festival, our local and state legislators, Micron, HP, etc.

Bottom line success: improving our financial situation and developing the ability to project and follow our budget closely in order to end the year on track to start developing reserve funds.

Please describe any challenges you anticipate during the upcoming year:

- 1) Finalizing the financial package to build a school facility.
- 2) Improving our AYP by continuing to work to identify interventions to help fill students' gaps in learning
- 3) Continuing to work within our very tight budget.
- 4) Increase student population while keeping our current students to develop consistency in the student group who is learning through our educational philosophies without having to continuously identify new student gaps and re-teaching a large number of students the basics of core subjects so they can excellerate into areas conducive to our inquiry-based, hand-on learning methods.

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

We appreciate the Idaho Public Charter School Commissions's continuous hard work as volunteers to oversee their charter schools with high expectations.

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)

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- 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

GOALS ATTAINMENT

DaVinci Charter School, #459

(Garden City Community School)

EXERPT from GARDEN COMMUNITY CHARTER SCHOOL's ORIGINAL CHARTER

B. Assessment

The role of assessment and evaluation is to help and encourage the learner. In our system, assessment and evaluation are utilized by learners for empowering feedback rather than being feared as extrinsic and authoritarian judgment. Furthermore, assessment and evaluation are designed to measure and reflect true understanding and application of knowledge rather than memorized facts and rote skills.

(GCCS/DaVinci Image of Education)

1. Measurable Educational Standards

The measurable educational standards of DaVinci Charter School are defined in terms of the demonstration of working knowledge or deep understanding in classroom-level performances. These performances will be designed to meet Idaho Standards objectives and any additional standards developed within school. Correlation to Idaho Standards will be explicitly demonstrated. Teachers will also use a variety of other formal and informal assessments, such as self-assessment, peer assessment, quizzes, tests, and work sampling, to gauge student progress.

Among the other measurable educational standards we will employ are performance benchmarks on standardized assessments employed by the State of Idaho. These benchmarks are targets that exceed current achievement levels of schools that serve Garden City students.

Idaho Reading Indicator

65% of Grade 1, Grade 2, and Grade 3 equivalent students will achieve corresponding grade-level scores on the Idaho Reading Indicator by the end of their third year in attendance. *DaVinci's goal is to show individual student growth with all students (K-3) as they progress through their school years or enter mid-year from other educational placements.*

2011 IRI Scores: Fall to Spring

K: 45%	83%
1: 48%	50%
2: 33%	38%
3: 37%	80%

Idaho Standards Achievement Test

While DaVinci knows students test results will show higher results as they progress through our unique educational learning process, the following are realistic goals that have been set for ISATs:

GOAL/GRADE LEVEL/SUBJECT/# STUDENTS PROFICIENT+/TOTAL STUDENTS TESTED

65% of **Grade 3** equivalent students will achieve a Proficient or Advanced score on the Reading, Language, and Math ISATs

Reading: 83% (10/12) Language: 50% (6/12) Math: 67% (8/12)

65% of **Grade 4** equivalent students will achieve a Proficient or Advanced score on the Reading, Language, and Math ISATs

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Reading: 72% (13/18) Language: 72% (13/18) Math: 56% (10/18)

65% of **Grade 5** equivalent students will achieve a Proficient/Advanced score on the Reading, Math, and Language ISAT tests

Reading: 78% (7/9) Language: 33% (3/9) Math: 44% (4/9)

65% of **Grade 6** equivalent students will achieve a Proficient/Advanced score on the Reading, Math, and Language ISAT tests

Reading: 39% (5/13) Language: 46% (6/13) Math: 46% (6/13)

65% of **Grade 7** equivalent students will achieve a Proficient/Advanced score on the Reading, Math, and Language ISAT tests

Reading: 83.3% (5/6) Language: 67% (4/6) Math: 17% (1/6)

65% of **Grade 8** equivalent students will achieve a Proficient/Advanced score on the Reading, Math, and Language ISAT tests

Reading: 71% (5/7) Language: 43% (3/7) Math: 14% (1/7)

DMA & DWA TESTS ARE NO LONGER USED IN IDAHO

If any of these goals are not met, DaVinci will re-examine its instructional practices and make appropriate improvements.

2. Measuring Student Progress

In the DaVinci model, we emphasize assessment that enhances learning. Learners will be encouraged to see assessments as learning experiences and as challenges. They will not be used as extrinsic motivators. The remainder of this section describes the blended modes of assessment that will be employed to monitor learner progress and ensure accountability within the system.

a. Classroom Assessments

Teachers will routinely employ formal and informal classroom assessments in order to gauge learners' understanding and skills. Some assessments will be drawn from commercially available curricula in use, such as the math texts. Learners will be encouraged to evaluate their own learning as well.

b. Performance-Based and Authentic Assessment

Performance-based and authentic assessments will be designed along with classroom units by teacher and by students in collaboration with teachers as part of the CLD process. These assessments will be devised with reference to Essential Learnings elements and Idaho Standards, goals, and objectives. They will be presented in the form of authentic and realistic situations that challenge learners across different learning areas and multiple intelligences.

Learners will learn to participate in the evaluation of their own performances alongside teachers. Both will be looking for evidence of, at a minimum, working knowledge, and preferably deep understanding. Exemplary work samples will be chosen and recorded in student portfolios.

c. Standardized Assessments

All students are required by Idaho law to take statewide standardized assessments, including the Idaho Reading Indicator, the Direct Math Assessment, the Direct Writing Assessment, and the ISAT tests. Although the GCCS does not employ the conventional age-grading system within the school, these tests will

be administered to students at the grade level that is equivalent for their age, and according to the schedule required by state laws governing standardized testing.

In addition, administrative law requires that students enrolled in the DaVinci Charter School participate in the National Assessment of Educational Progress (NAEP), if the school is selected.

4. Accountability for Meeting Measurable Student Educational Standards

A public education system should be always seeking its purpose within the larger context of stakeholder aspirations and the conditions of a changing world. The term "stakeholder" includes everyone that is affected by the education system, which means everyone in the community, children and adults, present and future. We maintain that educational programs and policies should be adapted to the community, the school, the classroom, and the learner. School curriculum should continually be examined and constructed to reflect community ideals. We also seek to foster a system that learns as it fosters learning among individuals. Therefore, the system is built around a living spiral of design that explicitly bridges aspirations, assumptions, values, intentions, plans, actions, and results.

(GCCS/DaVinci Image of Education)

In DaVinci Charter School, everyone is considered accountable for meeting measurable student educational standards. This includes students, staff, parents, local District and state administrators, and the system itself.

Students are held accountable through the choices they make in the design of units, the effort that they put in, and the strategies that they employ to improve their progress. Feedback on performance will be very clear to them through the multi-faceted assessment approach used by the school. If students do not make adequate progress in progressing through standards and Essential Learnings, they consequently are guided to invest more time in those areas until they are making adequate progress.

Teachers and school administration are accountable for meeting measurable student educational standards through the progress that their students make through standards and Essential Learnings, as well as via classroom assessments, work sampling and portfolios, and standardized exams. Another channel of accountability is the rate at which students are drawn toward particular teachers when choices are available. Teachers must also consistently uphold the "4R's" principles and the school discipline policy, which is important to the atmosphere of the school as a learning community.

Parents are held accountable by being expected to attend parenting education classes and by being asked to be an active participant in the life of the school, by which they may better understand what is happening in the classroom and in the lives of their children.

District and state administrators are held accountable for adequate funding, for open communication, and for making cooperation and coordination of support services as simple and effective as possible.

The DaVinci system itself is accountable through its core design. If the design is not adequately equipping learners for success, then the entire design spiral – from Image of Education to Design Solutions that have been implemented – will be examined by the Community Council for areas of weakness in adapting to the realities of how students learn, to the needs of the community, or to available resources. The Image of Education can be altered, new Design Solutions can be generated, and policies and methodologies can be changed to strengthen the school and its learners. *

the Garden City Community School embraces the following principles that serve to guarantee equity:

Universal Design for Learning: Our comprehensive design process is uniquely open to design solutions that serve the needs of all learners, even when those solutions are originally intended to provide equity for learners qualified for special services under IDEA. This happens to be the basis for the Universal Design for Learning model advanced by David H. Rose et al in the context of special education. In short, the brain research-based UDL framework proposes that educators strive for three kinds of flexibility:

- To represent information in multiple formats and media.
- To provide multiple pathways for students' action and expression.
- To provide multiple ways to engage students' interest and motivation.

The three UDL principles, implemented with new media, can help educators improve how they set goals, individualize instruction, and assess students' progress.

Individualized Learning Design: The responsibility extended to learners for evaluating and reflecting upon their own learning program will also be afforded to learners with special needs to the greatest extent possible.

Inclusion: When provided with a viable choice between isolating learners with special needs and including them in regular classes, we will opt for inclusion. This is in accordance with the spirit of the legal requirement for Least Restrictive Environments.

Parental Involvement: Parents will be involved in every step taken by the school in regard to their children with special needs. This applies even in cases where there is only a perception among staff that special needs may exist and may potentially be best served under an IEP (Individual Education Plan) or 504 plan.

Cooperative Teaching: Regular teachers and special education staff will work closely together in the classroom to best serve their learners with special needs.

2. GCCS Protocol for Identifying and Serving Learners with Special Needs

1. Pre-Referral

Pre-Referral is an initial step that may be prompted by observations by teachers or other staff and/or parents. Records from previous schools may indicate special needs as well. The Pre-Referral Team will consist of the school's administrative director, one or more of the child's classroom teachers, the school counselor, the school's special education teacher, and other specialized staff. Parental involvement will be sought at this stage. The task

of the Pre-Referral Team is to assess the situation and determine the actions to be taken to meet the needs of the child.

The ideal outcome of pre-referral is prompt action that enables the learner to both participate fully and learn fully without the need for additional resources. Regular teachers and special education staff will cooperate both within and outside of the classroom to exhaust all feasible responses to an emergent special need. Interventions might include changes in the presentation of information, changes in classroom tasks or organization, changes in assessment, or changes in technology. However, if best efforts at intervention at this level are not successful, testing for disability will be sought.

2. Testing and the Child Study Team

If pre-referral interventions are unsuccessful, a Child Study Team will be prepared to test the child for disabilities. The permission of parents or guardians must be obtained for testing to occur. The Child Study Team will consist of specialists from among GCCS and those contracted privately or through the Boise School District, who have expertise in evaluating the range of possible disabilities that a child may have. If parental permission for testing is not obtained, the Pre-Referral Team will, with the greatest possible cooperation of parents/guardians, attempt to explore other options for meeting the needs of the child.

3. Conclusive Results of Testing and the Individual Education Plan

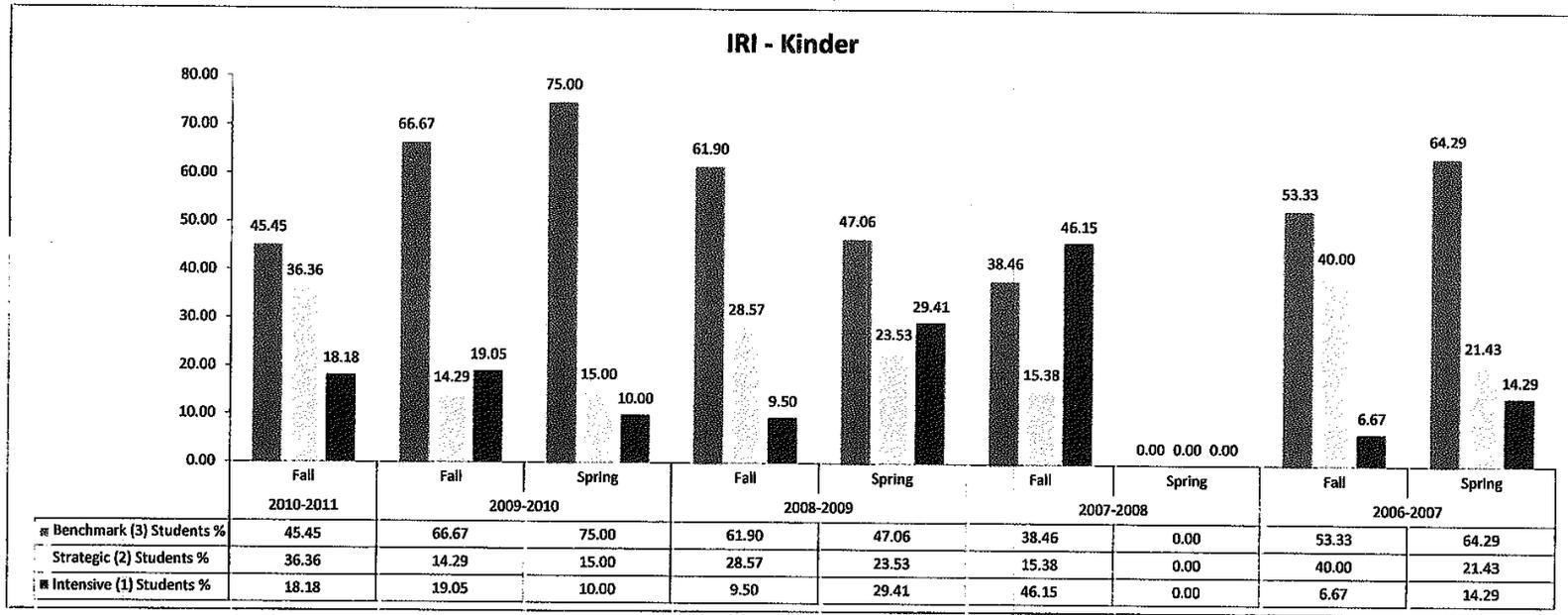
If testing concludes that the child has a disability defined within IDEA, then an Individual Education Plan (IEP) will be developed for meeting the needs of the child in a Least Restrictive Environment. The student's Individualized Learning Design will integrate the content and prescriptions of the IEP. The IEP will be re-evaluated annually to reflect the results of child behavior and performance, follow-up testing, the effectiveness of various interventions, and the recommendations of those involved in the IEP's creation (staff, parents, and student).

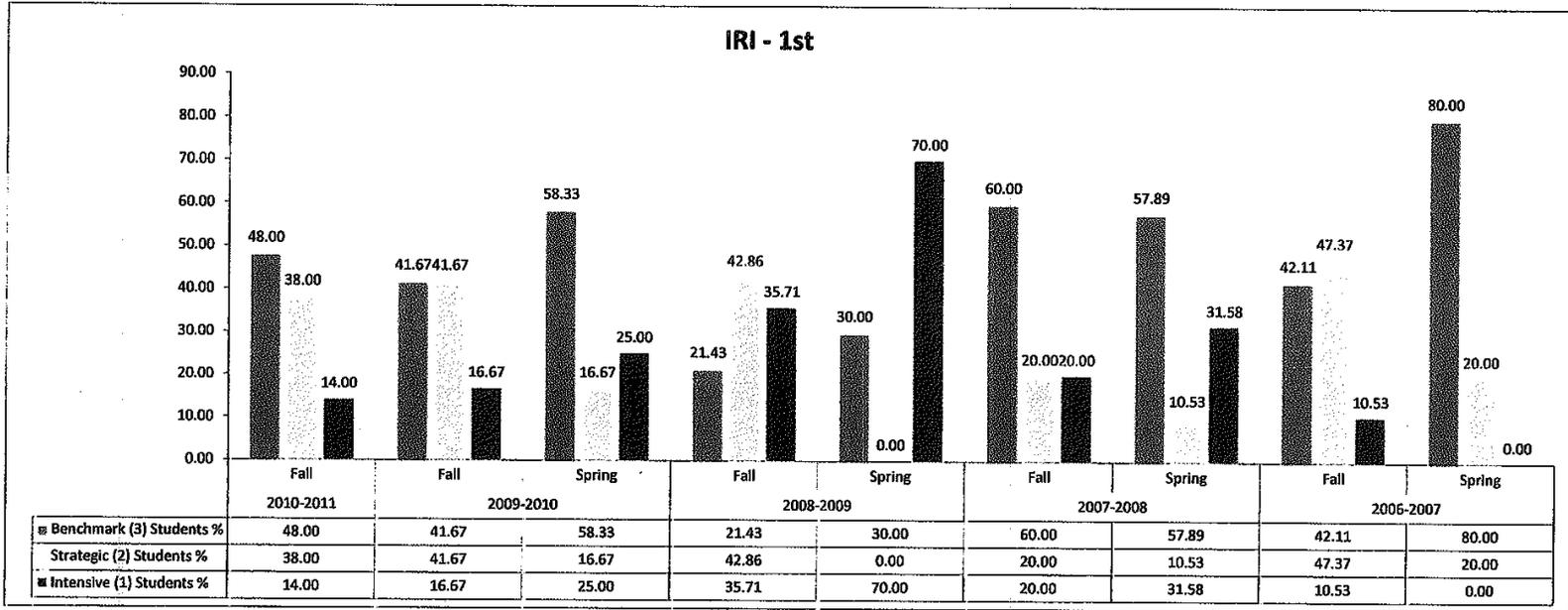
It is the long-term goal of the school to eliminate the need for an IEP and special services through enabling the learner to advance physically, cognitively, and emotionally to the point of equity in the general environment of both the school and the community.

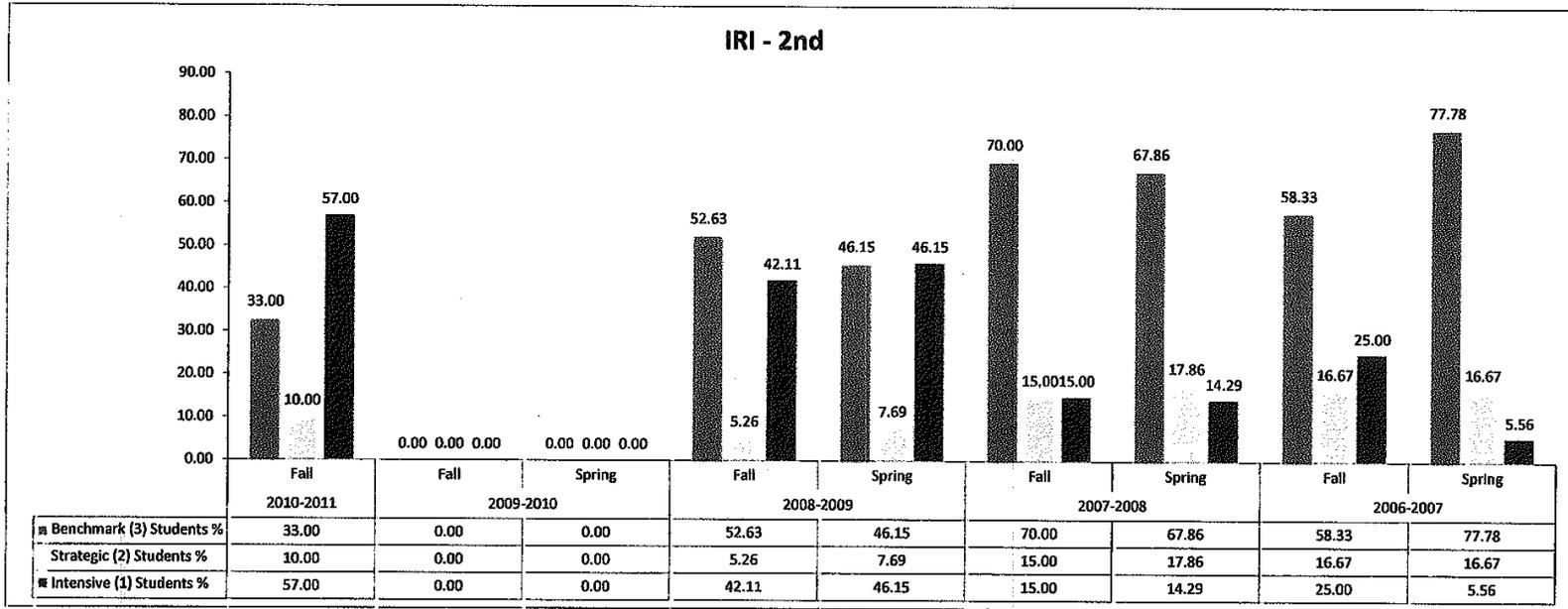
3. Section 504

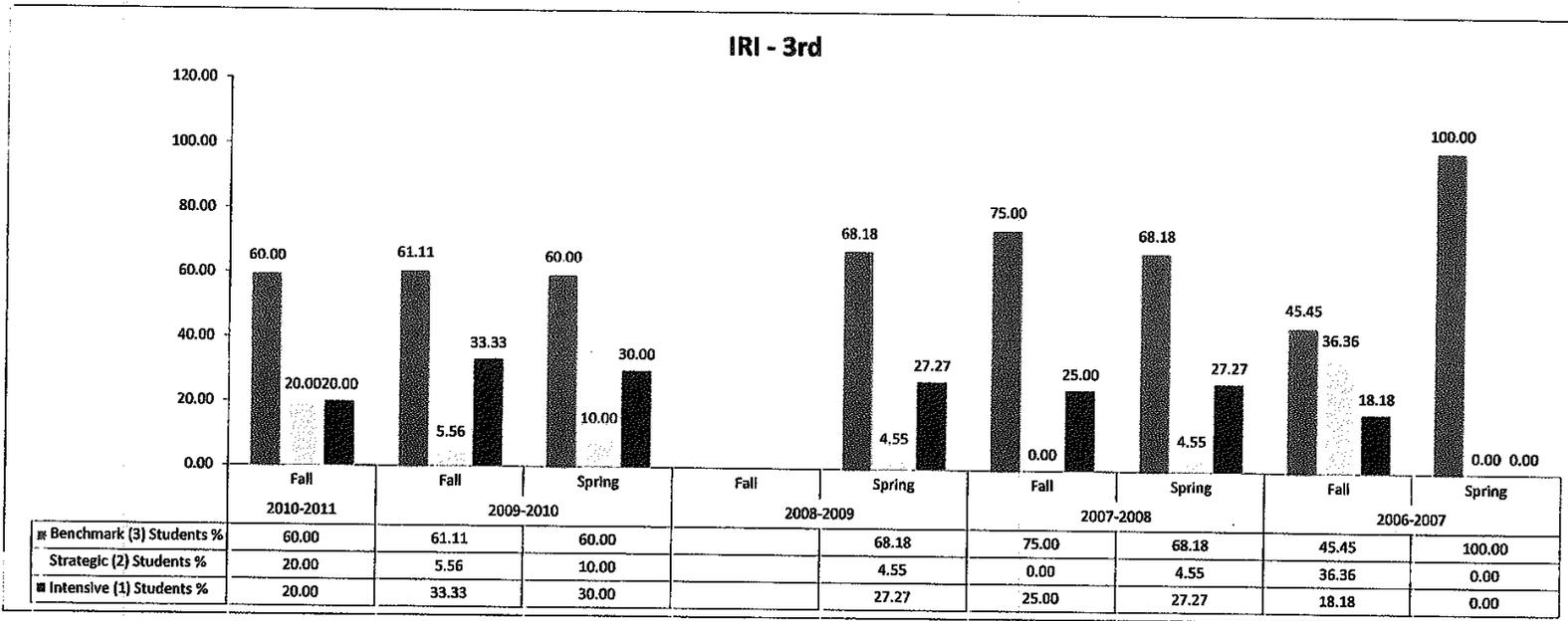
Students who do not qualify under IDEA may qualify for special services under Section 504 of the Rehabilitation Act of 1973. This eligibility will be assessed during the Pre-Referral and Testing stages. Rather than an IEP, qualification under 504 will result in an Accommodation Plan.

IRI								
Grade	Year	Semester	Benchmark (3)		Strategic (2)		Strategic (1)	
			Students		Students		Students	
			#	%	#	%	#	%
Kinder	2010-2011	Fall	10	45.45	8	36.36		
	2009-2010	Fall	14	66.67	3	14.29		
		Spring	15	75.00	3	15.00	2	10.00
	2008-2009	Fall	13	61.90	6	28.57		
		Spring	8	47.06	4	23.53	5	29.41
	2007-2008	Fall	5	38.46	2	15.38		
		Spring	N/A	N/A	N/A	N/A	N/A	N/A
	2006-2007	Fall	8	53.33	6	40.00		
Spring		9	64.29	3	21.43	2	14.29	
1st	2010-2011	Fall	10	48.00	8	38.00		
	2009-2010	Fall	5	41.67	5	41.67		
		Spring	7	58.33	2	16.67	3	25.00
	2008-2009	Fall	3	21.43	6	42.86		
		Spring	3	30.00	0	0.00	7	70.00
	2007-2008	Fall	9	60.00	3	20.00		
		Spring	11	57.89	2	10.53	6	31.58
	2006-2007	Fall	8	42.11	9	47.37		
Spring		12	80.00	3	20.00	0	0.00	
2nd	2010-2011	Fall	7	33.00	2	10.00		
	2009-2010	Fall	N/A	N/A	N/A	N/A		
		Spring	N/A	N/A	N/A	N/A	N/A	N/A
	2008-2009	Fall	10	52.63	1	5.26		
		Spring	12	46.15	2	7.69	12	46.15
	2007-2008	Fall	14	70.00	3	15.00		
		Spring	19	67.86	5	17.86	4	14.29
	2006-2007	Fall	7	58.33	2	16.67		
Spring		14	77.78	3	16.67	1	5.56	
3rd	2010-2011	Fall	6	60.00	2	20.00		
	2009-2010	Fall	11	61.11	1	5.56		
		Spring	12	60.00	2	10.00	6	30.00
	2008-2009	Fall						
		Spring	15	68.18	1	4.55	6	27.27
	2007-2008	Fall	15	75.00	0	0.00		
		Spring	15	68.18	1	4.55	6	27.27
	2006-2007	Fall	5	45.45	4	36.36		
Spring		11	100.00	0	0.00	0	0.00	



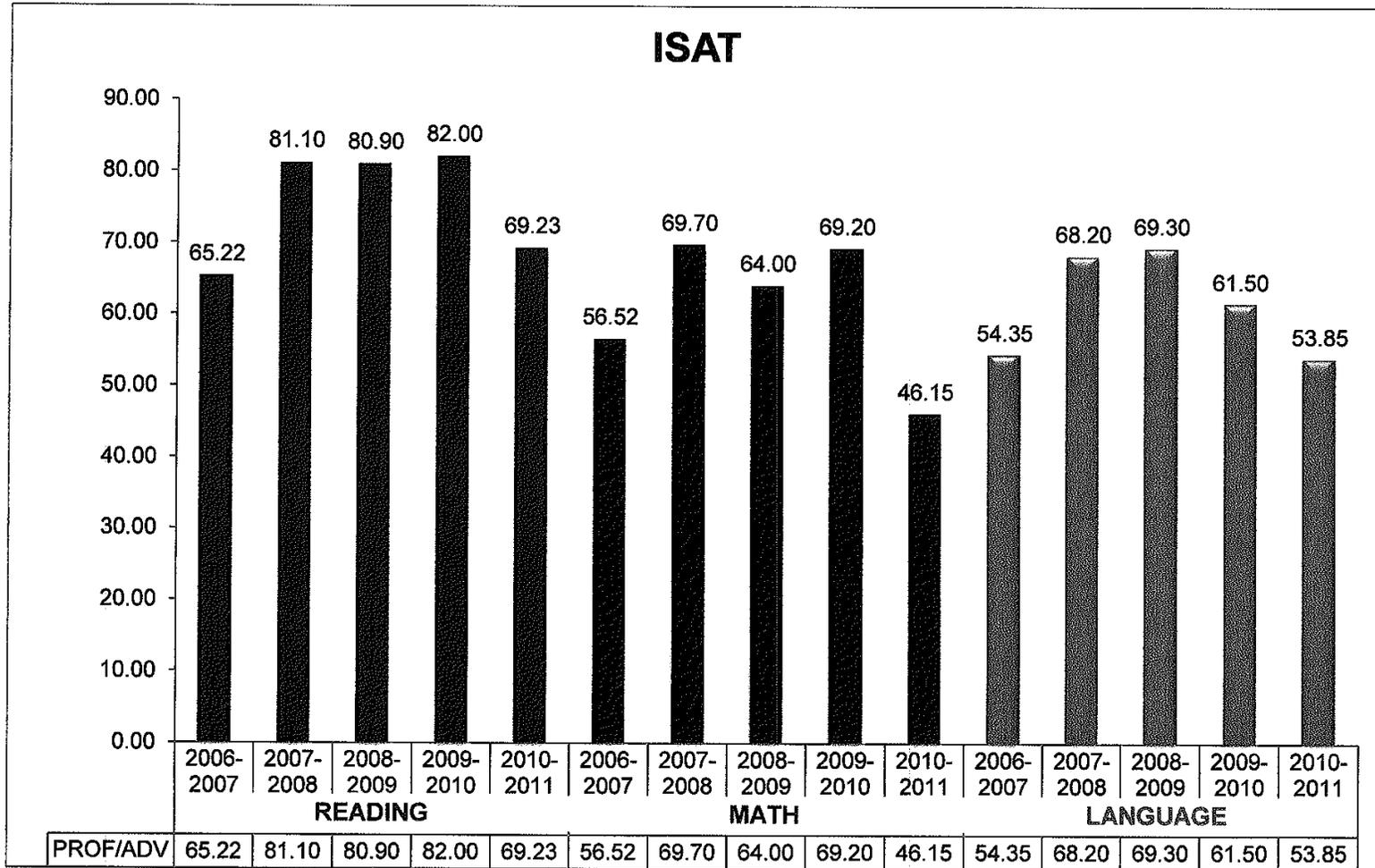




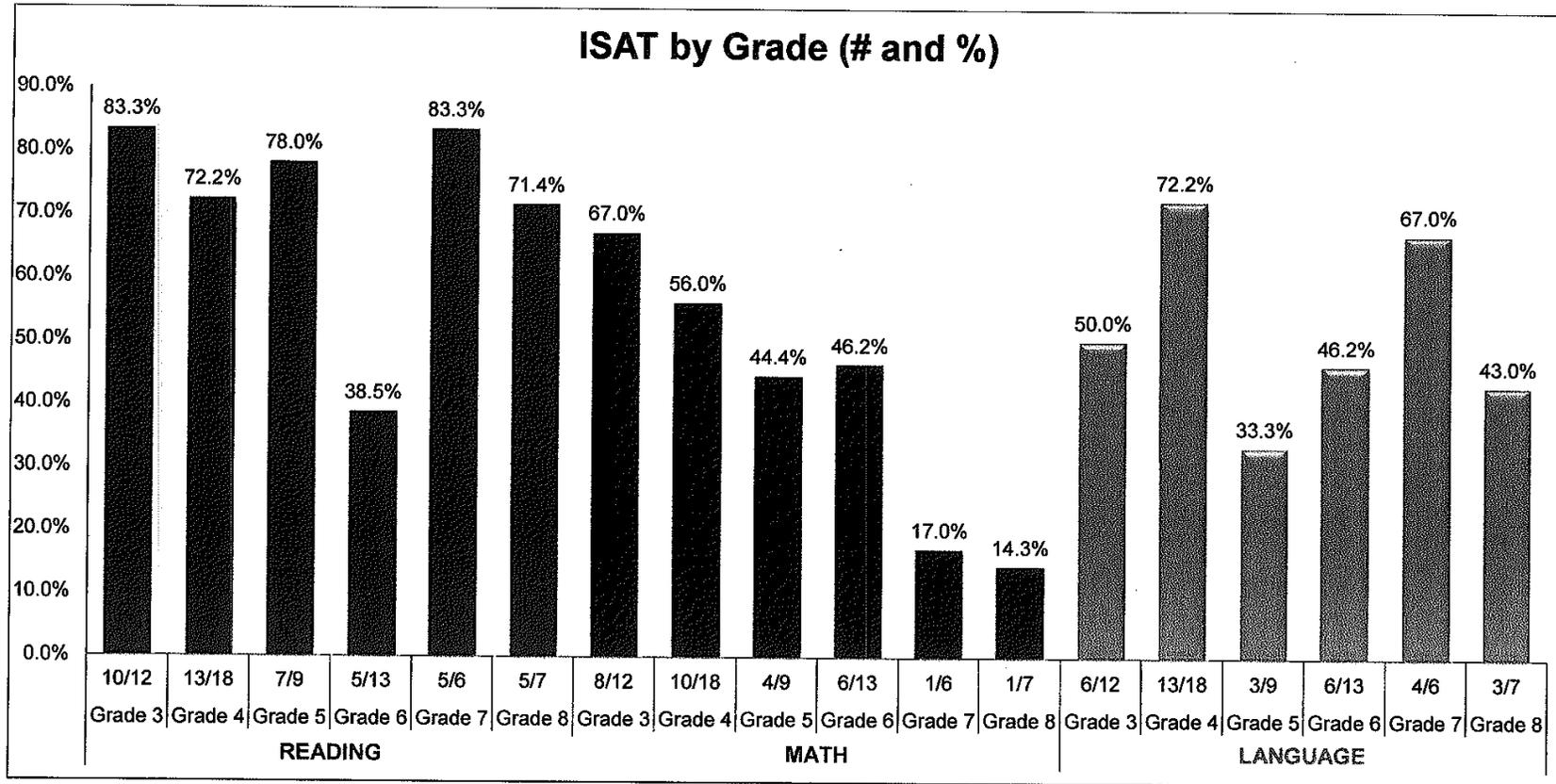


ISAT

Subject	Year	% Students Tested	PROF/ADV
READING	2010-2011	100.0%	69.23
	2009-2010	100.0%	82.00
	2008-2009	100.0%	80.90
	2007-2008	96.7%	81.10
	2006-2007	100.0%	65.22
MATH	2010-2011	100.0%	46.15
	2009-2010	100.0%	69.20
	2008-2009	98.8%	64.00
	2007-2008	97.8%	69.70
	2006-2007	100.0%	56.52
LANGUAGE	2010-2011	100.0%	53.85
	2009-2010	100.0%	61.50
	2008-2009	98.8%	69.30
	2007-2008	97.8%	68.20
	2006-2007	100.0%	54.35



Spring 2011



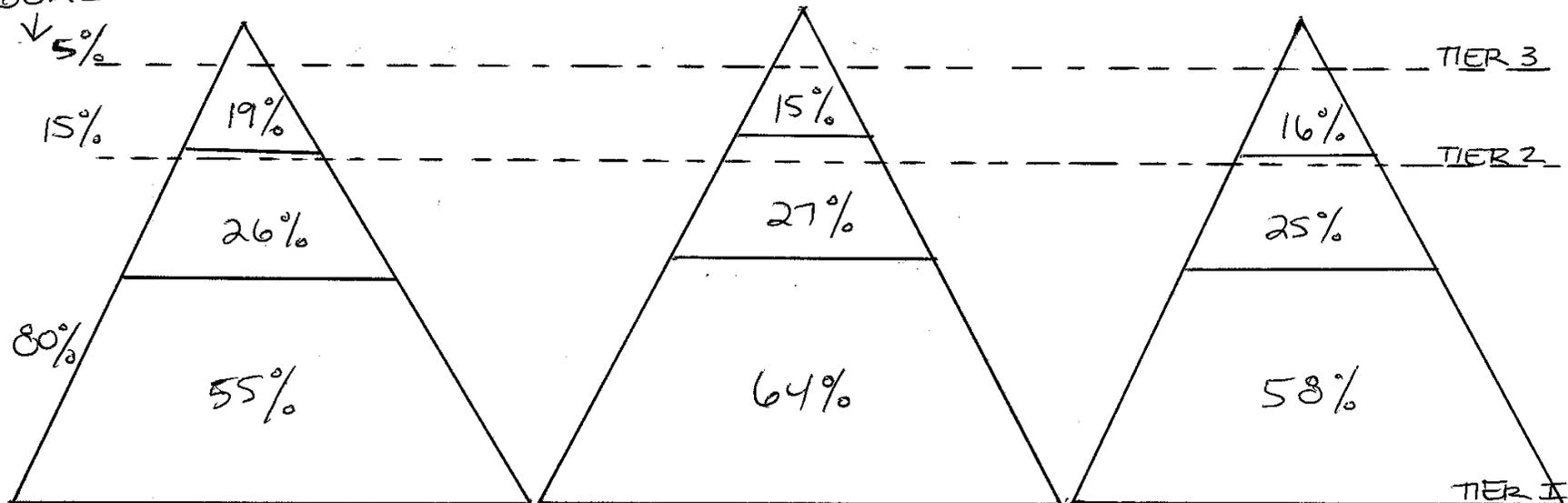
DaVinci Charter School #459

RTI Tiers as of 11/11/11

	Math						Reading						Language					
	1		2		3		1		2		3		1		2		3	
K	17 / 22	77%	2 / 22	9%	3 / 22	14%	19 / 22	86%	1 / 22	5%	2 / 22	9%	19 / 22	86%	1 / 22	5%	2 / 22	9%
1	12 / 19	63%	1 / 19	5%	6 / 19	32%	9 / 19	47%	3 / 19	16%	4 / 19	21%	9 / 19	47%	3 / 19	16%	4 / 19	21%
2	9 / 16	56%	3 / 16	19%	4 / 16	25%	10 / 16	62.5%	2 / 16	12.5%	3 / 16	19%	8 / 16	50%	4 / 16	25%	4 / 16	25%
3	11 / 20	55%	9 / 20	45%	0 / 20	0%	10 / 20	50%	10 / 20	50%	0 / 20	0%	6 / 20	30%	12 / 20	60%	2 / 20	10%
4	6 / 17	35%	8 / 17	47%	3 / 17	18%	11 / 17	64%	4 / 17	24%	2 / 17	12%	10 / 17	59%	5 / 17	29%	2 / 17	12%
5	10 / 19	53%	4 / 19	21%	5 / 19	26%	10 / 19	53%	3 / 19	5%	6 / 19	32%	12 / 19	63%	3 / 19	16%	4 / 19	21%
6	6 / 9	67%	2 / 9	22%	1 / 9	11%	6 / 9	67%	1 / 9	11%	2 / 9	22%	6 / 9	67%	2 / 9	22%	1 / 9	11%
7	3 / 8	37.5%	1 / 8	12.5%	4 / 8	50%	5 / 8	63%	2 / 8	25%	1 / 8	12.5%	4 / 8	50%	2 / 8	25%	2 / 8	25%
8	1 / 6	17%	5 / 6	83%	0 / 6	0%	5 / 6	83%	1 / 6	17%	0 / 6	0%	4 / 6	67%	2 / 6	33%	0 / 6	0%
	75 / 136	55%	35 / 136	26%	26 / 136	19%	85 / 136	64%	27 / 133	20%	20 / 133	15%	78 / 134	58%	34 / 134	25%	21 / 134	16%
	Tier I Math		Tier II Math		Tier III Math		Tier I Reading		Tier II Reading		Tier III Reading		Tier I Language		Tier II Language		Tier III Language	

MINIMUM GOAL

↓ 5%

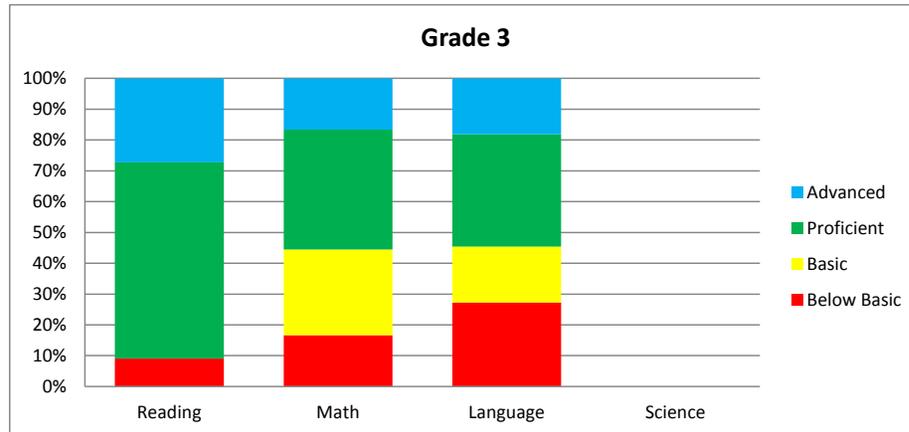


Math

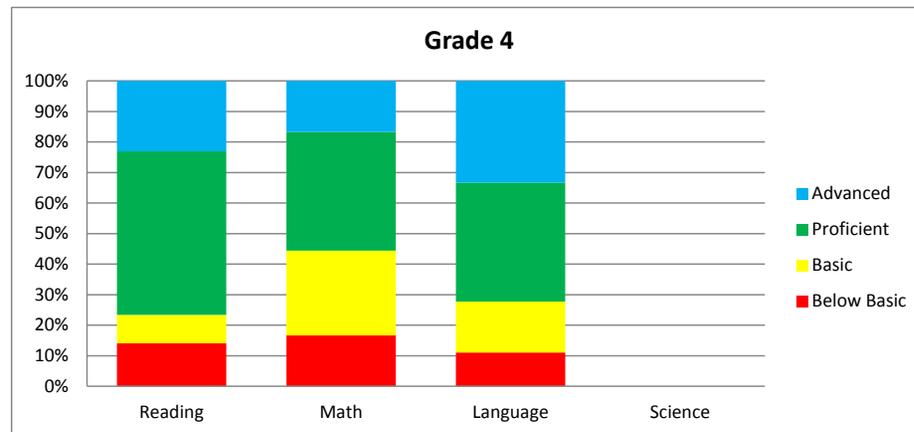
Reading
(All School Totals)

Language

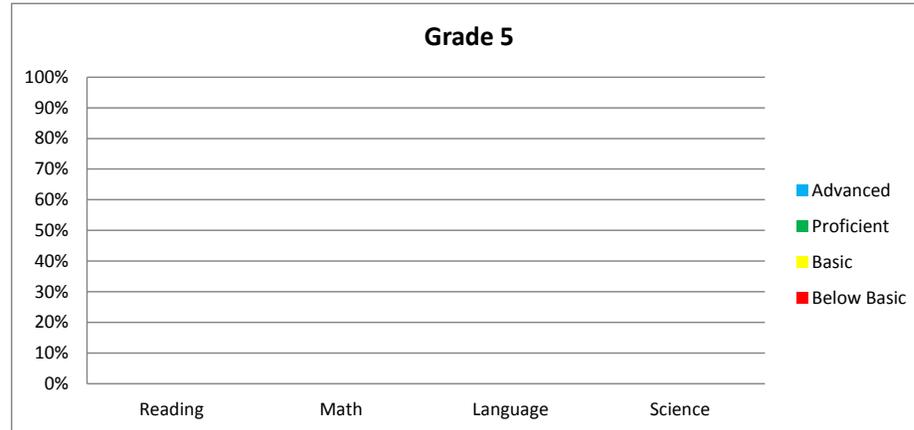
Grade 3	Reading	Math	Language	Science
Below Basic	9.1	16.7	27.3	
Basic	0	27.8	18.2	
Proficient	63.6	38.9	36.4	
Advanced	27.3	16.7	18.2	



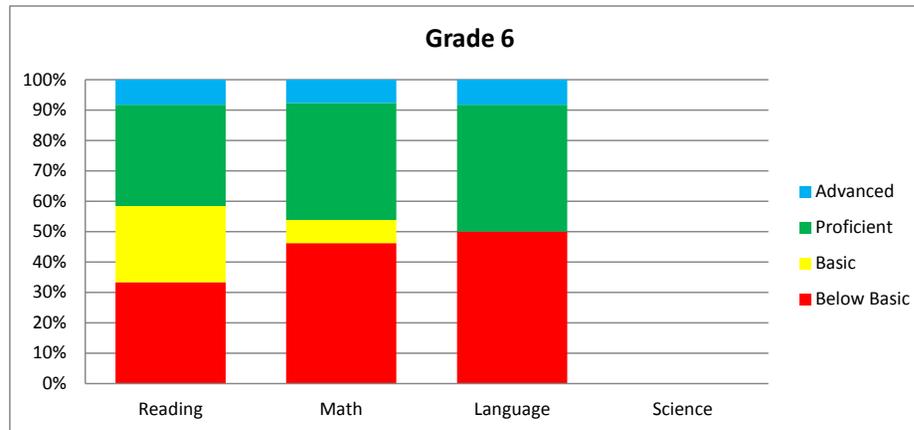
Grade 4	Reading	Math	Language	Science
Below Basic	16.7	16.7	11.1	
Basic	11.1	27.8	16.7	
Proficient	63.6	38.9	38.9	
Advanced	27.3	16.7	33.3	



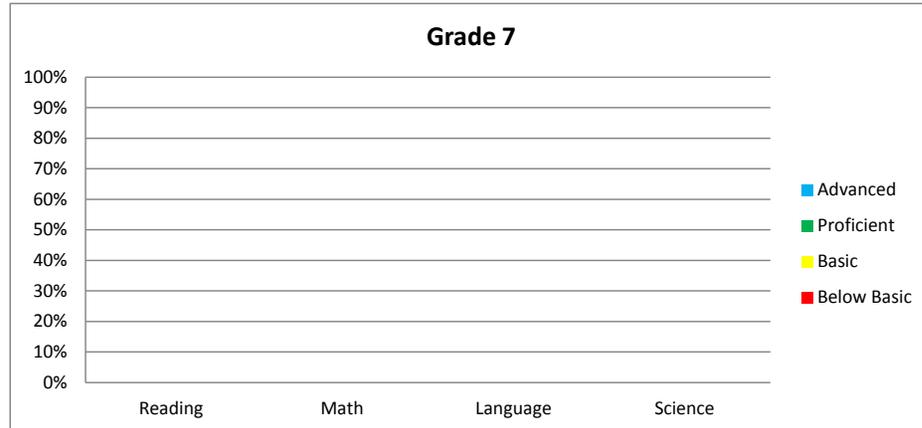
Grade 5	Reading	Math	Language	Science
Below Basic	*	*	*	*
Basic	*	*	*	*
Proficient	*	*	*	*
Advanced	*	*	*	*



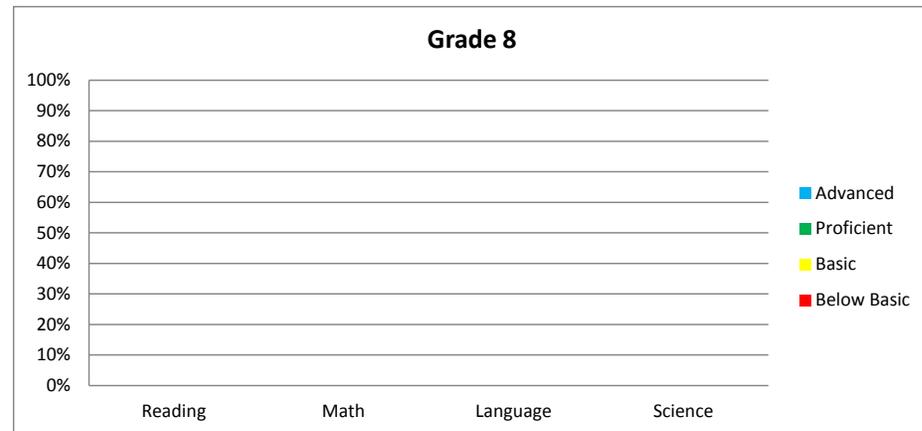
Grade 6	Reading	Math	Language	Science
Below Basic	33.3	46.2	50	
Basic	25	7.7	0	
Proficient	33.3	38.5	41.7	
Advanced	8.3	7.7	8.3	



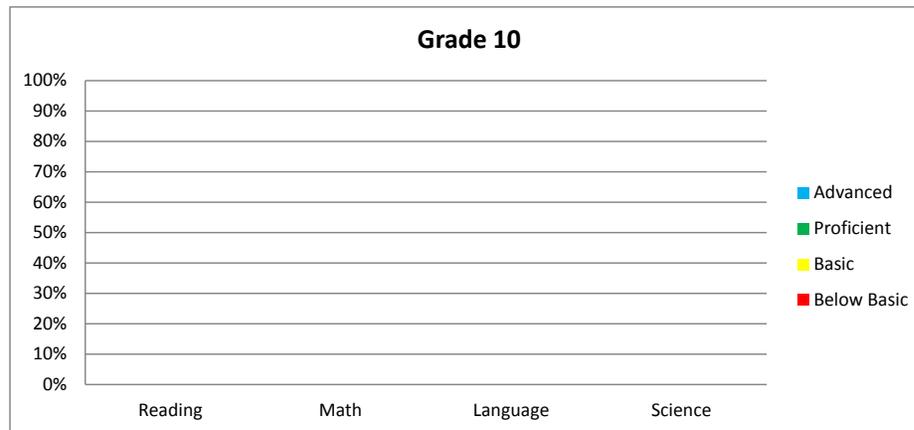
Grade 7	Reading	Math	Language	Science
Below Basic	*	*	*	*
Basic	*	*	*	*
Proficient	*	*	*	*
Advanced	*	*	*	*



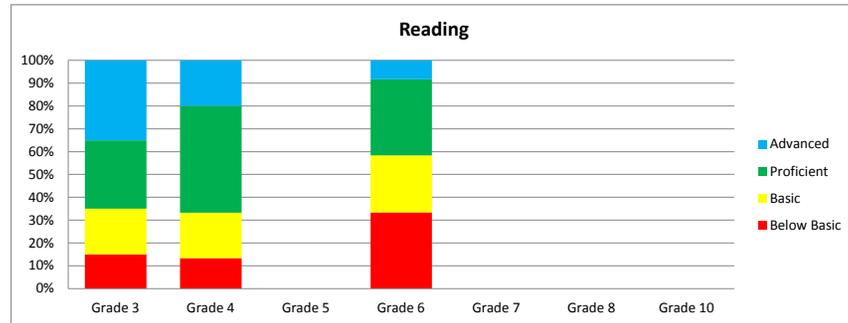
Grade 8	Reading	Math	Language	Science
Below Basic	*	*	*	*
Basic	*	*	*	*
Proficient	*	*	*	*
Advanced	*	*	*	*



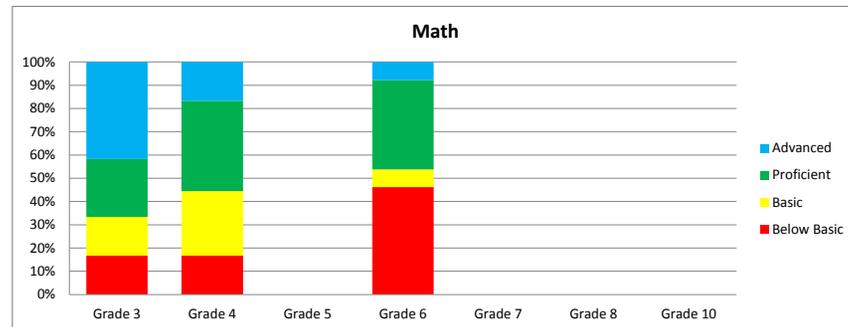
Grade 10	Reading	Math	Language	Science
Below Basic	#N/A	#N/A	#N/A	#N/A
Basic	#N/A	#N/A	#N/A	#N/A
Proficient	#N/A	#N/A	#N/A	#N/A
Advanced	#N/A	#N/A	#N/A	#N/A



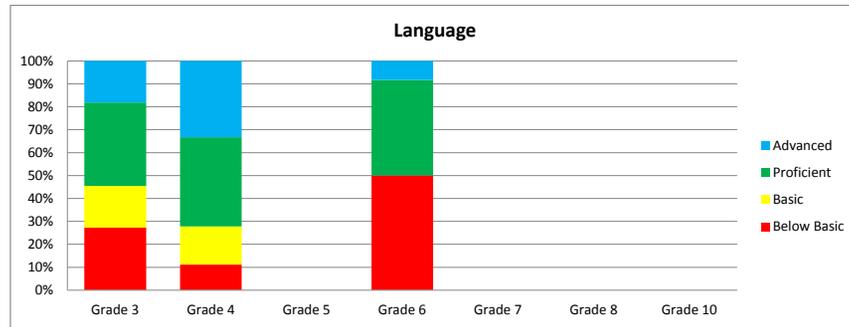
Reading	Grade 3	Grade 4	Grade 5	Grade 6	Grade 7	Grade 8	Grade 10
Below Basic	15	13.3 *		33.3 *	*		#N/A
Basic	20	20 *		25 *	*		#N/A
Proficient	30	46.7 *		33.3 *	*		#N/A
Advanced	35	20 *		8.3 *	*		#N/A



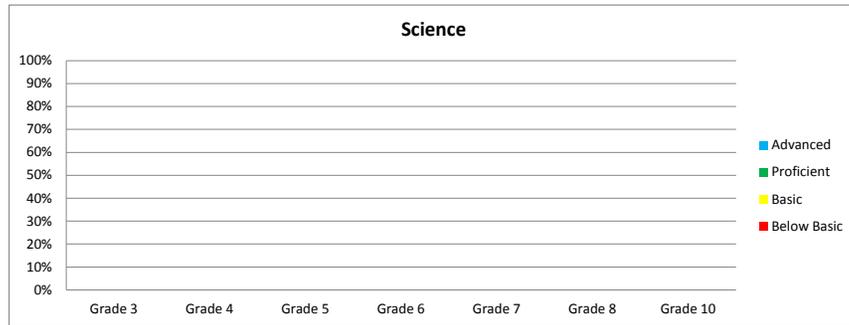
Math	Grade 3	Grade 4	Grade 5	Grade 6	Grade 7	Grade 8	Grade 10
Below Basic	16.7	16.7 *		46.2 *	*		#N/A
Basic	16.7	27.8 *		7.7 *	*		#N/A
Proficient	25	38.9 *		38.5 *	*		#N/A
Advanced	41.7	16.7 *		7.7 *	*		#N/A



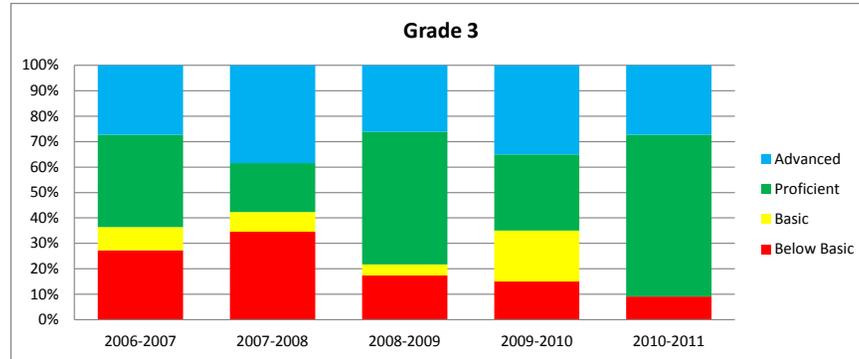
Language	Grade 3	Grade 4	Grade 5	Grade 6	Grade 7	Grade 8	Grade 10
Below Basic	27.3	11.1 *		50 *	*		#N/A
Basic	18.2	16.7 *		0 *	*		#N/A
Proficient	36.4	38.9 *		41.7 *	*		#N/A
Advanced	18.2	33.3 *		8.3 *	*		#N/A



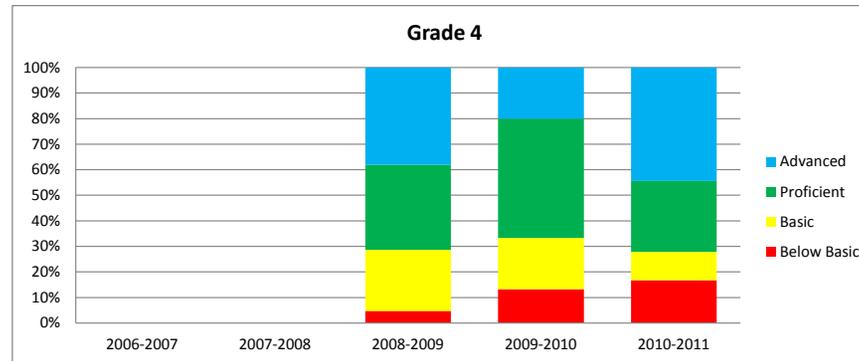
Science	Grade 3	Grade 4	Grade 5	Grade 6	Grade 7	Grade 8	Grade 10
Below Basic		*			*		#N/A
Basic		*		*			#N/A
Proficient		*		*			#N/A
Advanced		*		*			#N/A



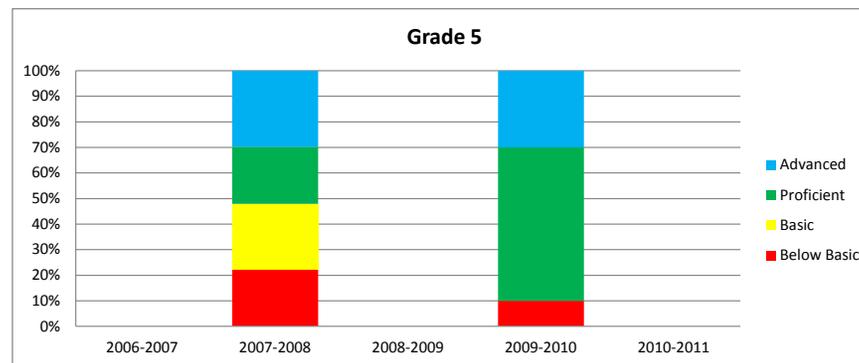
Reading Grade 3	2006-2007	2007-2008	2008-2009	2009-2010	2010-2011
Below Basic	27.3	34.6	17.4	15	9.1
Basic	9.1	7.7	4.3	20	0
Proficient	36.4	19.2	52.2	30	63.6
Advanced	27.3	38.5	26.1	35	27.3



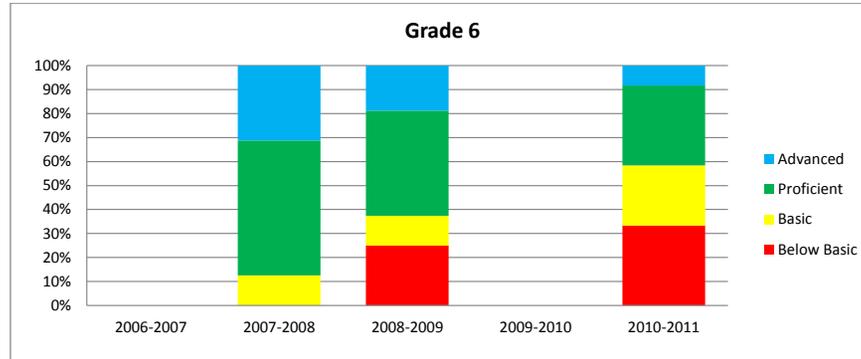
Reading Grade 4	2006-2007	2007-2008	2008-2009	2009-2010	2010-2011
Below Basic	*	*	4.8	13.3	16.7
Basic	*	*	23.8	20	11.1
Proficient	*	*	33.3	46.7	27.8
Advanced	*	*	38.1	20	44.4



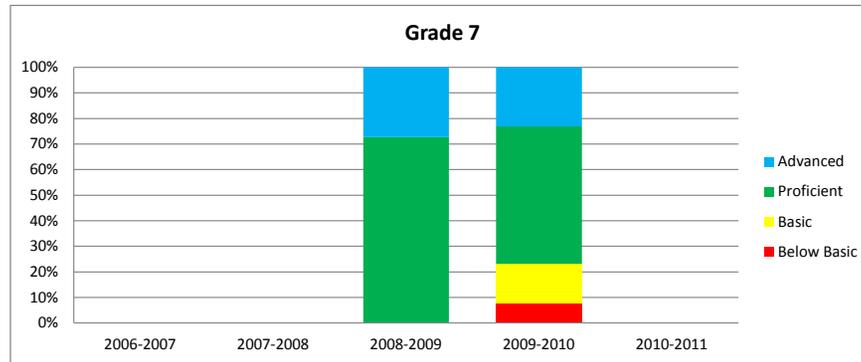
Reading Grade 5	2006-2007	2007-2008	2008-2009	2009-2010	2010-2011
Below Basic	*	25 *		7.1 *	
Basic		9.1	7.7 *	28.6 *	
Proficient	*	25 *		42.9 *	
Advanced	*	33.3 *		21.4 *	



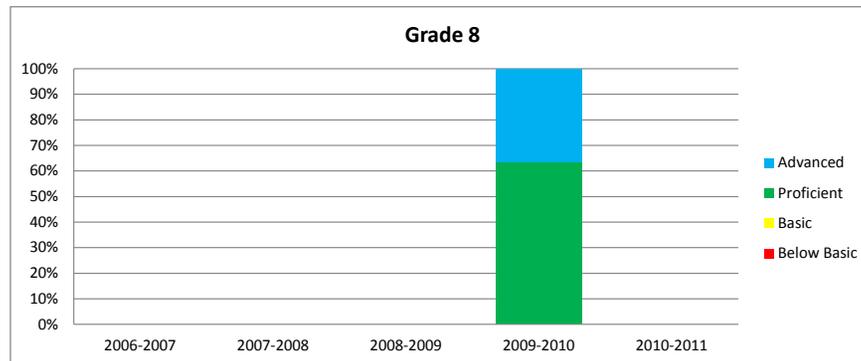
Reading Grade 6	2006-2007	2007-2008	2008-2009	2009-2010	2010-2011
Below Basic	*	0	25 *		33.3
Basic	*	12.5	12.5 *		25
Proficient	*	56.3	43.8 *		33.3
Advanced	*	31.3	18.8 *		8.3



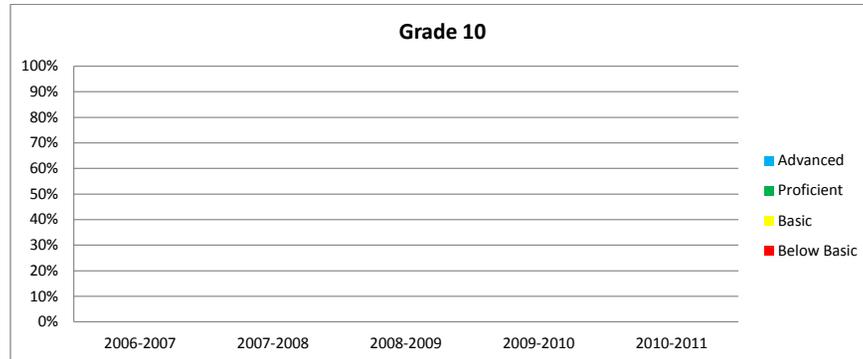
Reading Grade 7	2006-2007	2007-2008	2008-2009	2009-2010	2010-2011
Below Basic	*	*	0	7.7 *	
Basic	*	*	0	15.4 *	
Proficient	*	*	72.7	53.8 *	
Advanced	*	*	27.3	23.1 *	



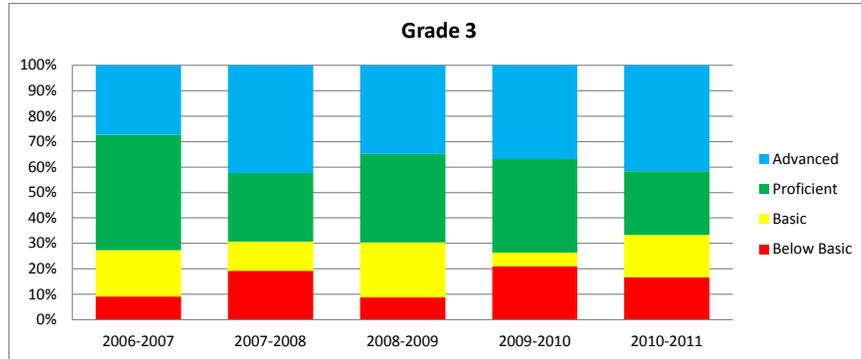
Reading Grade 8	2006-2007	2007-2008	2008-2009	2009-2010	2010-2011
Below Basic	*	*	*	0 *	
Basic	*	*	*	0 *	
Proficient	*	*	*	63.6 *	
Advanced	*	*	*	36.4 *	



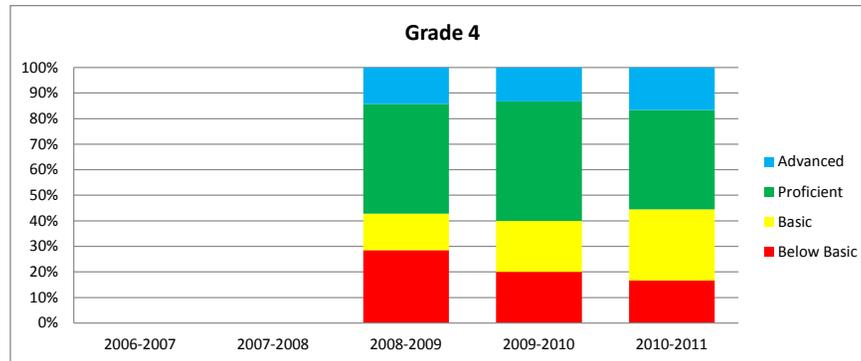
Reading Grade 10	2006-2007	2007-2008	2008-2009	2009-2010	2010-2011
Below Basic	#N/A	#N/A		#N/A	#N/A
Basic	#N/A	#N/A		#N/A	#N/A
Proficient	#N/A	#N/A		#N/A	#N/A
Advanced	#N/A	#N/A		#N/A	#N/A



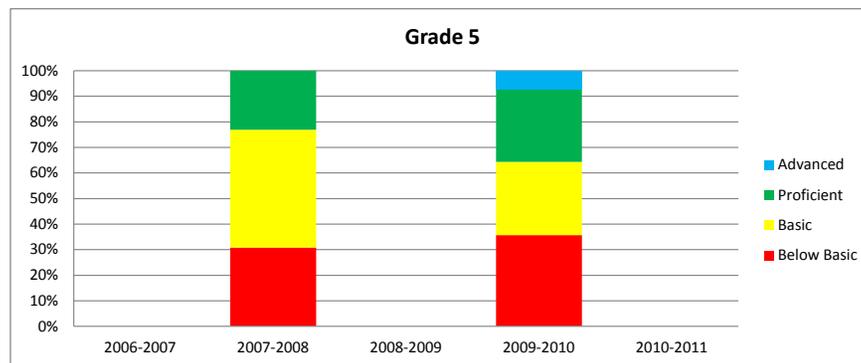
Math Grade 3	2006-2007	2007-2008	2008-2009	2009-2010	2010-2011
Below Basic	9.1	19.2	8.7	21.1	16.7
Basic	18.2	11.5	21.7	5.3	16.7
Proficient	45.5	26.9	34.8	36.8	25
Advanced	27.3	42.3	34.8	36.8	41.7



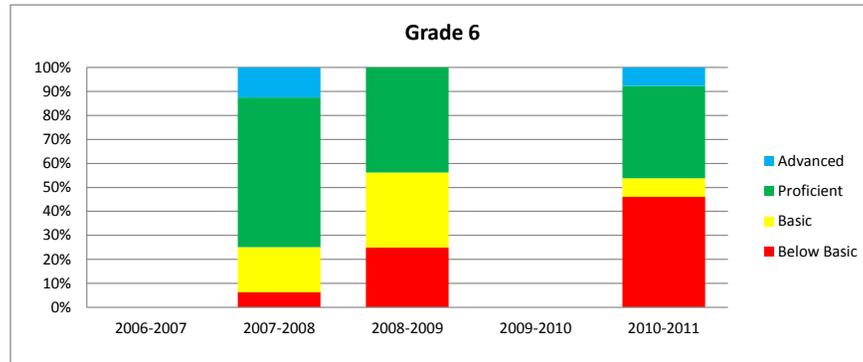
Math Grade 4	2006-2007	2007-2008	2008-2009	2009-2010	2010-2011
Below Basic	*	*	28.6	20	16.7
Basic	*	*	14.3	20	27.8
Proficient	*	*	42.9	46.7	38.9
Advanced	*	*	14.3	13.3	16.7



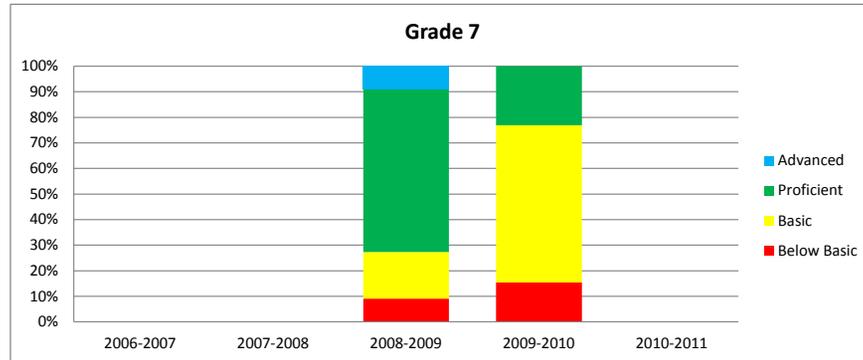
Math Grade 5	2006-2007	2007-2008	2008-2009	2009-2010	2010-2011
Below Basic	*	30.8 *	*	35.7 *	*
Basic	*	46.2 *	*	28.6 *	*
Proficient	*	23.1 *	*	28.6 *	*
Advanced	*	0 *	*	7.1 *	*



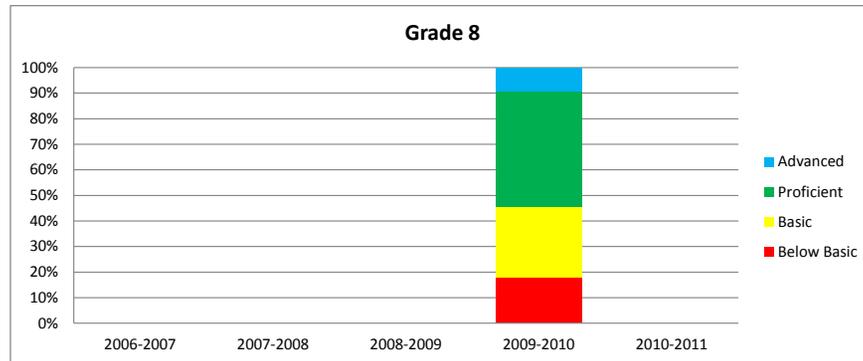
Math Grade 6	2006-2007	2007-2008	2008-2009	2009-2010	2010-2011
Below Basic	*	6.3	25 *		46.2
Basic	*	18.8	31.3 *		7.7
Proficient	*	62.5	43.8 *		38.5
Advanced	*	12.5	0 *		7.7



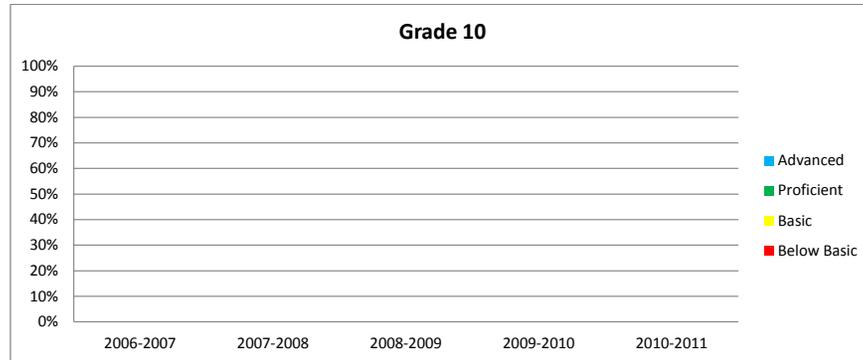
Math Grade 7	2006-2007	2007-2008	2008-2009	2009-2010	2010-2011
Below Basic	*	*	9.1	15.4 *	
Basic	*	*	18.2	61.5 *	
Proficient	*	*	63.6	23.1 *	
Advanced	*	*	9.1	0 *	



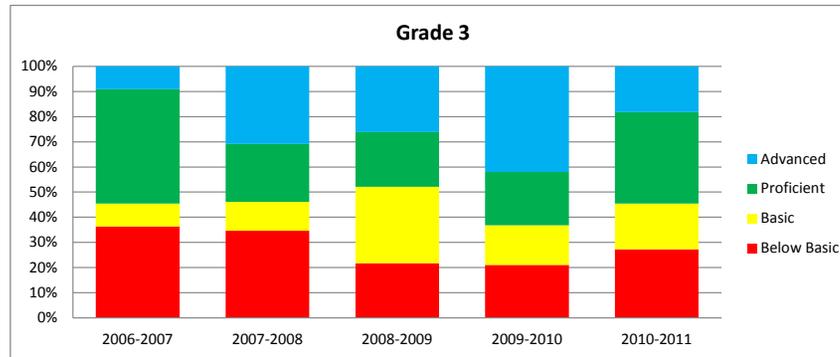
Math Grade 8	2006-2007	2007-2008	2008-2009	2009-2010	2010-2011
Below Basic	*	*	*	18.2 *	
Basic	*	*	*	27.3 *	
Proficient	*	*	*	45.5 *	
Advanced	*	*	*	9.1 *	



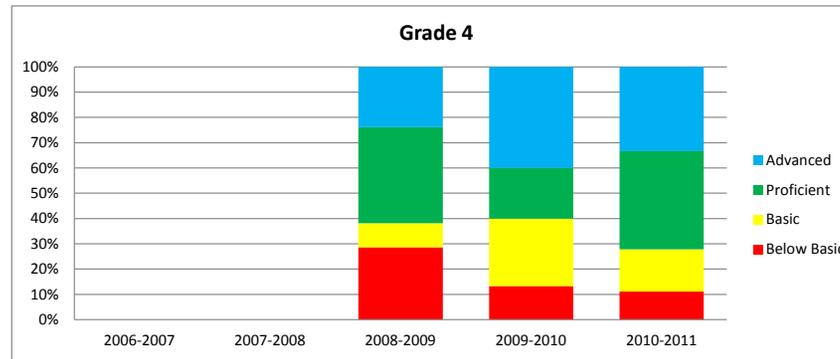
Math Grade 10	2006-2007	2007-2008	2008-2009	2009-2010	2010-2011
Below Basic	#N/A			#N/A	#N/A
Basic	#N/A			#N/A	#N/A
Proficient	#N/A			#N/A	#N/A
Advanced	#N/A			#N/A	#N/A



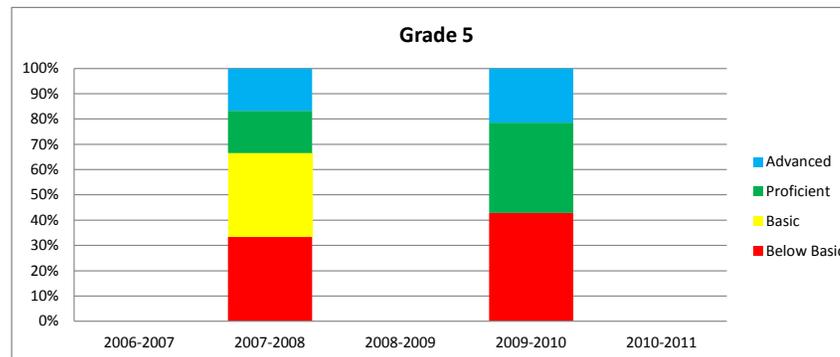
Language Grade 3	2006-2007	2007-2008	2008-2009	2009-2010	2010-2011
Below Basic	36.4	34.6	21.7	21.1	27.3
Basic	9.1	11.5	30.4	15.8	18.2
Proficient	45.5	23.1	21.7	21.1	36.4
Advanced	9.1	30.8	26.1	42.1	18.2



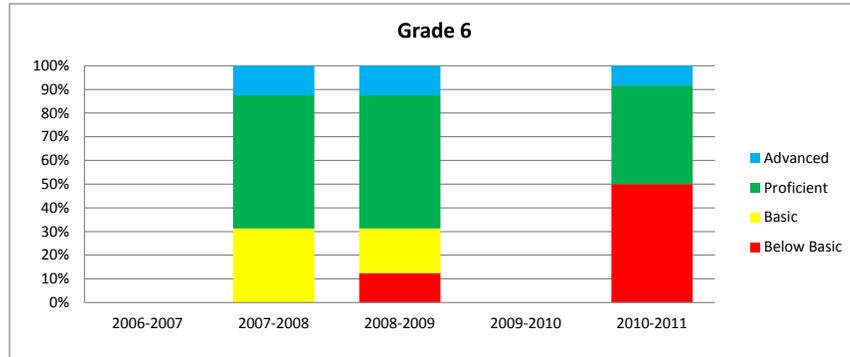
Language Grade 4	2006-2007	2007-2008	2008-2009	2009-2010	2010-2011
Below Basic	*	*	28.6	13.3	11.1
Basic	*	*	9.5	26.7	16.7
Proficient	*	*	38.1	20	38.9
Advanced	*	*	23.8	40	33.3



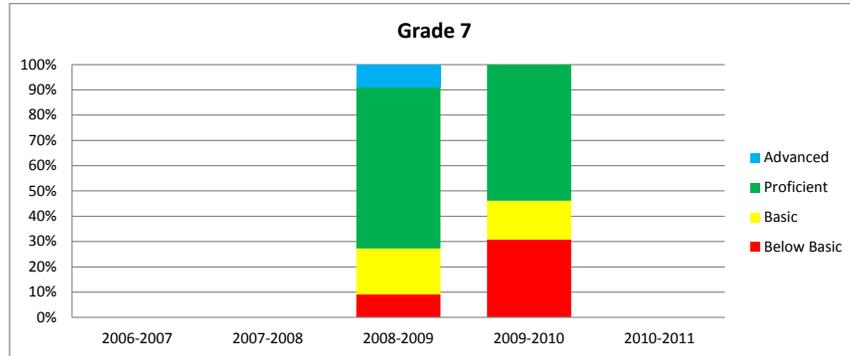
Language Grade 5	2006-2007	2007-2008	2008-2009	2009-2010	2010-2011
Below Basic	*	33.3 *		42.9 *	
Basic	*	33.3 *		0 *	
Proficient	*	16.7 *		35.7 *	
Advanced	*	16.7 *		21.4 *	



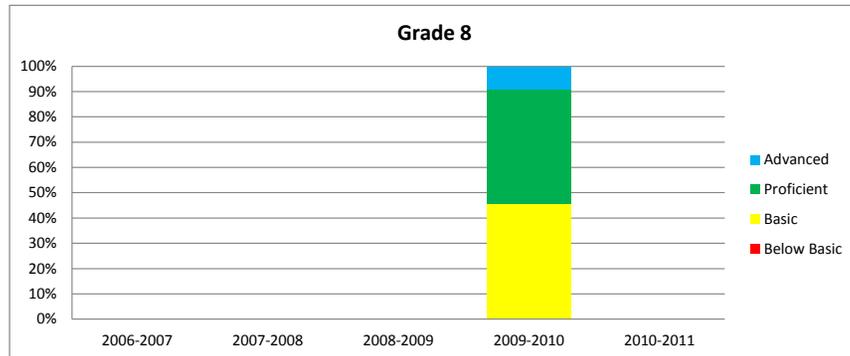
Language Grade 6	2006-2007	2007-2008	2008-2009	2009-2010	2010-2011
Below Basic	*	0	12.5 *		50
Basic	*	31.3	18.8 *		0
Proficient	*	56.3	56.3 *		41.7
Advanced	*	12.5	12.5 *		8.3



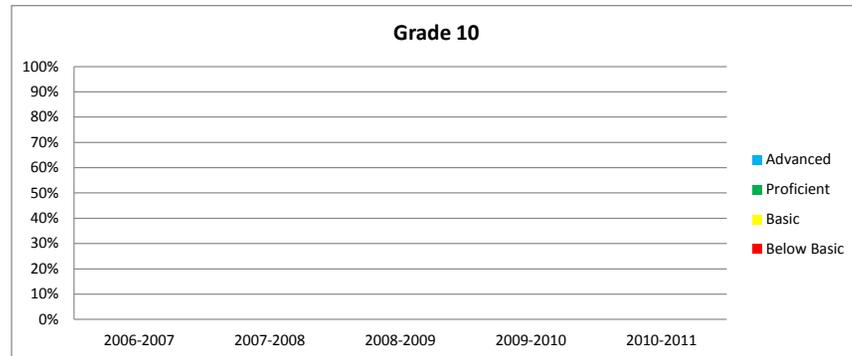
Language Grade 7	2006-2007	2007-2008	2008-2009	2009-2010	2010-2011
Below Basic	*	*	9.1	30.8 *	
Basic	*	*	18.2	15.4 *	
Proficient	*	*	63.6	53.8 *	
Advanced	*	*	9.1	0 *	



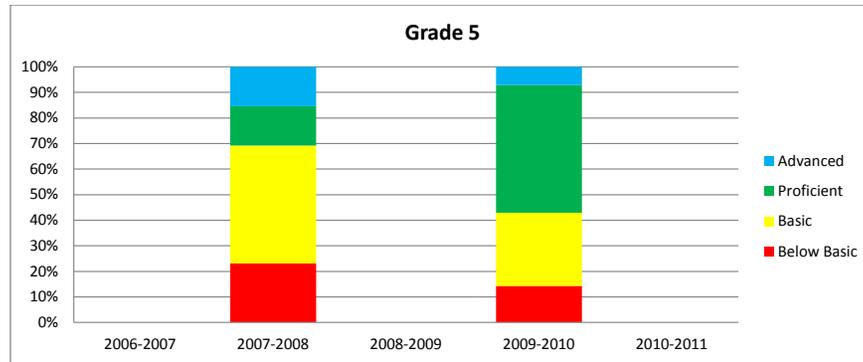
Language Grade 8	2006-2007	2007-2008	2008-2009	2009-2010	2010-2011
Below Basic	*	*	*	0 *	
Basic	*	*	*	45.5 *	
Proficient	*	*	*	45.5 *	
Advanced	*	*	*	9.1 *	



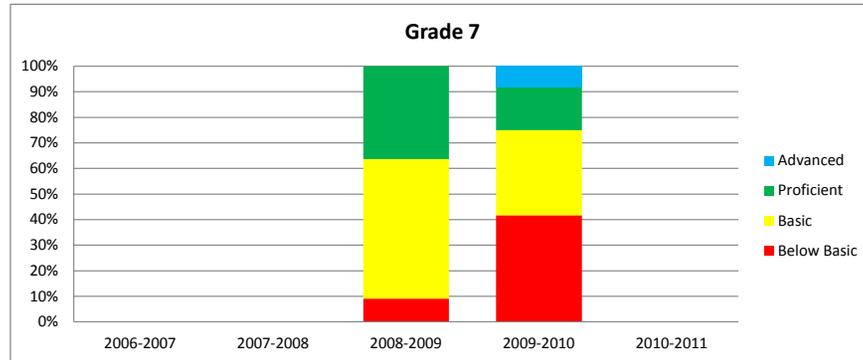
Lang. Grade 10	2006-2007	2007-2008	2008-2009	2009-2010	2010-2011
Below Basic	#N/A			#N/A	#N/A
Basic	#N/A			#N/A	#N/A
Proficient	#N/A			#N/A	#N/A
Advanced	#N/A			#N/A	#N/A



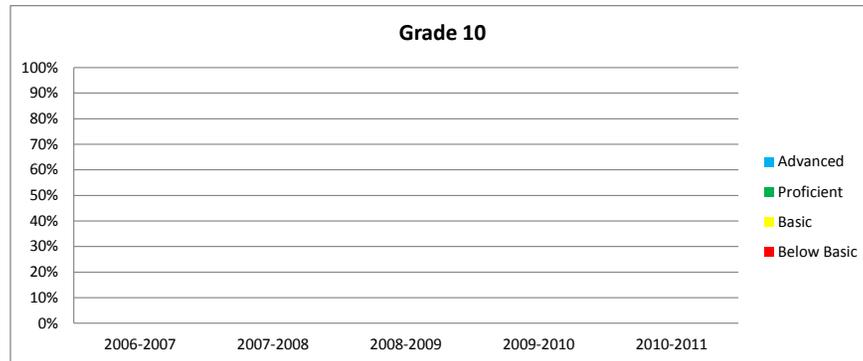
Science Grade 5	2006-2007	2007-2008	2008-2009	2009-2010	2010-2011
Below Basic	*	23.1 *		14.3 *	
Basic	*	46.2 *		28.6 *	
Proficient	*	15.4 *		50 *	
Advanced	*	15.4 *		7.1 *	



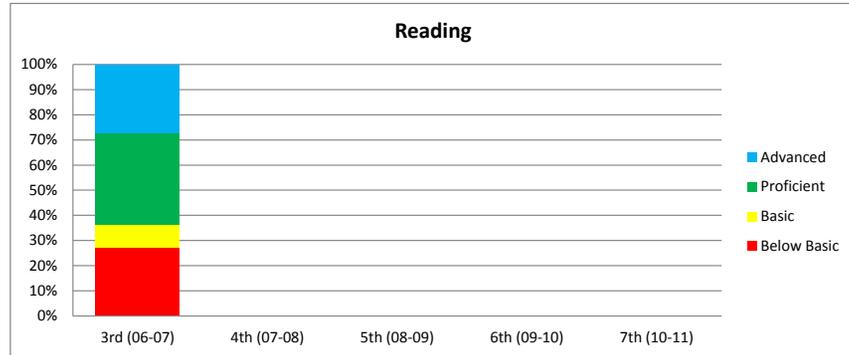
Science Grade 7	2006-2007	2007-2008	2008-2009	2009-2010	2010-2011
Below Basic	*	*	9.1	41.7 *	
Basic	*	*	54.5	33.3 *	
Proficient	*	*	36.4	16.7 *	
Advanced	*	*	0	8.3 *	



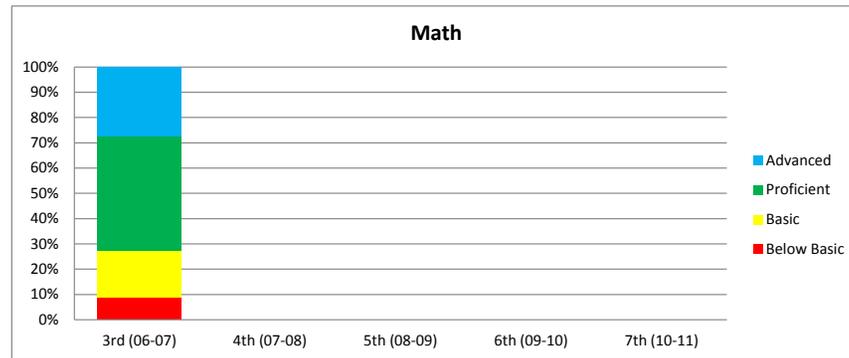
Science Grade 10	2006-2007	2007-2008	2008-2009	2009-2010	2010-2011
Below Basic	#N/A	#N/A		#N/A	#N/A
Basic	#N/A	#N/A		#N/A	#N/A
Proficient	#N/A	#N/A		#N/A	#N/A
Advanced	#N/A	#N/A		#N/A	#N/A



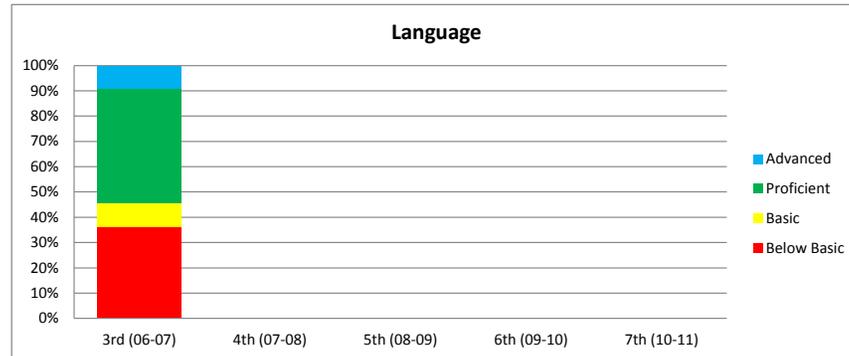
Class of 2015	3rd (06-07)	4th (07-08)	5th (08-09)	6th (09-10)	7th (10-11)
Below Basic	27.3 *	*	*	*	*
Basic	9.1 *	*	*	*	*
Proficient	36.4 *	*	*	*	*
Advanced	27.3 *	*	*	*	*



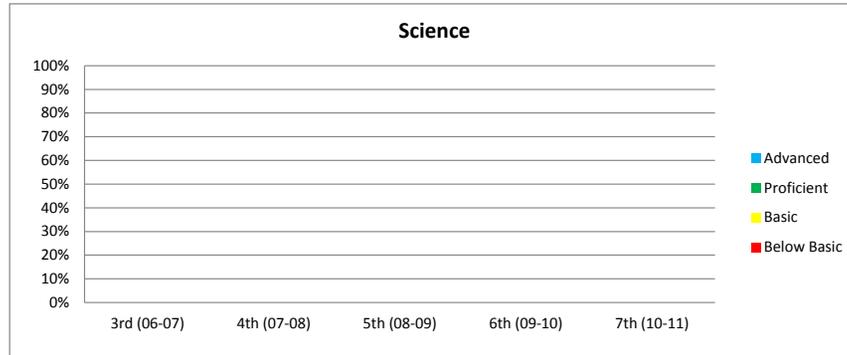
Class of 2015	3rd (06-07)	4th (07-08)	5th (08-09)	6th (09-10)	7th (10-11)
Below Basic	9.1 *	*	*	*	*
Basic	18.2 *	*	*	*	*
Proficient	45.5 *	*	*	*	*
Advanced	27.3 *	*	*	*	*



Class of 2015	3rd (06-07)	4th (07-08)	5th (08-09)	6th (09-10)	7th (10-11)
Below Basic	36.4 *	*	*	*	*
Basic	9.1 *	*	*	*	*
Proficient	45.5 *	*	*	*	*
Advanced	9.1 *	*	*	*	*



Class of 2015	3rd (06-07)	4th (07-08)	5th (08-09)	6th (09-10)	7th (10-11)
Below Basic	#N/A	#N/A	*	#N/A	*
Basic	#N/A	#N/A	*	#N/A	*
Proficient	#N/A	#N/A	*	#N/A	*
Advanced	#N/A	#N/A	*	#N/A	*



DaVinci Charter School AND SUBMISSION DATE OF COMPLETED TEMPLATE	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) This column for state use only.	Difference Between State and School's Projected
REVENUE							
Salary Apportionment	\$ 349,206.00	\$349,779.00	\$349,206.00	100.16%			
Benefit Apportionment	\$ 62,997.00		\$62,997.00	0.00%			
Entitlement	\$157,008.00		\$157,008.00	0.00%	Entitlement was based on 128		
State Transportation	\$ 19,479.00		\$19,479.00	0.00%			
Lottery	\$ 8,000.00	\$ 6,169.00	\$8,000.00	77.11%			
Other State Funds (Specify)	\$ 4,400.00		\$4,400.00	0.00%	Remidiation and LEP		
Special Ed - Regular	\$ 29,562.00	\$ (242.00)	\$29,562.00	-0.82%			
Special Ed - ARRA				#DIV/0!			
Title I	\$ 36,000.00	\$ -	\$36,000.00	0.00%			
Federal Title I Funds : ARRA	\$38,051.00			0.00%			
Medicaid Reimbursement	\$ 31,000.00	\$ 2,217.36	\$31,000.00	7.15%			
Title IIA	\$ 5,000.00	\$ (183.00)	\$5,000.00	-3.66%			
Local Revenue (Specify)	\$ 98,950.05	\$ 7,983.50	\$98,950.05	8.07%	Carry over, Special Programs Fee		
Federal Startup Grant				#DIV/0!			
Other Grants (Specify)				#DIV/0!			
Fundraising	\$ 13,500.00	\$ 479.74	\$13,500.00	3.55%			
Interest Earned	\$ 1,000.00	\$ 138.37	\$1,000.00	13.84%			
Other (Specify)	\$ 20,500.00	\$ (3,287.05)	\$20,500.00	-16.03%	Federal Lunch Program		
Other (Specify)	\$ 21,200.00	\$ (1,668.57)	\$21,200.00	-7.87%	Ed Jobs		
TOTAL REVENUE	\$895,853.05	\$361,386.35	\$857,802.05	40.34%			\$0.00
EXPENDITURES							
100 Salaries							
Teachers	\$ 210,269.28	\$ 18,147.42	\$210,269.28	8.63%			
Special Education	\$ 22,000.00	\$ 2,365.83	\$22,000.00	10.75%			
Instructional Aides	\$ 34,173.00	\$ 3,852.49	\$34,173.00	11.27%			
Classified/Office	\$ 70,264.20	\$ 5,005.24	\$70,264.20	7.12%			
Administration	\$ 78,150.00	\$ 6,512.50	\$78,150.00	8.33%			
Maintenance				#DIV/0!			
Other (Specify)				#DIV/0!			
Other (Specify)				#DIV/0!			
Total Salaries	\$414,856.48	\$35,883.48	\$414,856.48	8.65%			
200 Employee Benefits							
PERSI/FICA/Benefits	\$ 157,884.57	\$ 12,533.56	\$157,884.57	7.94%			
Other (Specify)				#DIV/0!			
Total Benefits	\$157,884.57	\$12,533.56	\$157,884.57	7.94%			
300 Purchased Services							
Management Services	\$ 2,500.00	\$ 21.00	\$2,500.00	0.84%			
Staff Dev/Title IIA	\$ 2,500.00	\$ 426.40	\$2,500.00	17.06%			
Legal Pub/Advertising	\$ 2,000.00	\$ 112.94	\$2,000.00	5.65%			
Legal Services	\$ 2,500.00	\$ 59.35	\$2,500.00	2.37%			
Special Education	\$ 32,000.00	\$ 1,885.00	\$32,000.00	5.89%			
Liability & Property Ins	\$ 6,000.00	\$ -	\$6,000.00	0.00%	Building and Workman Comp		
Substitute Teachers	\$ 3,600.00	\$ 201.50	\$3,600.00	5.60%			
Board Expenses				#DIV/0!			
Computer Services	\$ 8,500.00	\$ -	\$8,500.00	0.00%			
Transportation	\$ 41,000.00	\$ 4,229.96	\$41,000.00	10.32%			
Travel	\$ 1,600.00	\$ 746.40	\$1,600.00	46.65%			
Other (Specify)	\$ 48,558.00	\$ 11,015.69	\$48,558.00	22.69%	LEP Services, SPECIAL PROGRAM PURCHASED SERVICES,Audit Fees,BANK SERVICE CHARGES,SERVICE CONTRACT(S),PURCHASED SERVICES - FOOD SERVICE,TITLE IA - PURCHASED SERVICES, TITLE IA - PARENT INVOLVEMENT, Custodial Services, Medicaid		
Other (Specify)				#DIV/0!			
Total Services	\$150,758.00	\$18,698.24	\$150,758.00	12.40%			\$0.00

February 9, 2012

CURRENT FISCAL YEAR BUDGET COMPARISON

Facilities				#DIV/0!		
Building Lease				#DIV/0!		
Land Lease	\$100,000.00			1.89%		
Modular Lease	\$ 100,000.00	\$ 6,870.39	\$100,000.00	6.87%		
Utilities, Phones, Lndscp	\$ 20,000.00	\$ 420.27	\$20,000.00	1.01%		
Site Preparation				#DIV/0!		
Other (Specify)				#DIV/0!		
Other (Specify)				#DIV/0!		
Total Facilities	\$220,000.00	\$7,290.66	\$120,000.00	3.31%		\$0.00
400 Supplies and Maintenance						
Textbooks	\$ 500.00	\$ -	\$500.00	0.00%		
School Supplies	\$ 9,000.00	\$ 1,274.77	\$9,000.00	14.16%		
Power School				#DIV/0!		
Custodial Supplies	\$ 2,000.00	\$ 217.58	\$2,000.00	10.88%		
Other (Specify)				#DIV/0!		
Other (Specify)				#DIV/0!		
Total Supplies	\$11,500.00	\$1,492.35	\$11,500.00	12.98%		\$0.00
500 Capital Objects						
Furniture				#DIV/0!		
Technical AV Equipment				#DIV/0!		
Other (Specify)	\$ 2,000.00	\$ -	\$2,000.00	0.00%	ELEMENTRAY TECHNOLOGY	
Other (Specify)				#DIV/0!		
Other (Specify)				#DIV/0!		
Other (Specify)				#DIV/0!		
Total Capital Objects	\$2,000.00	\$0.00	\$2,000.00	0.00%		\$0.00
Debt Service						
Specify				#DIV/0!		
Specify				#DIV/0!		
Specify				#DIV/0!		
Total Debt Service	\$0.00	\$0.00	\$0.00	#DIV/0!		\$0.00
Grant Purchases						
Specify				#DIV/0!		
Specify				#DIV/0!		
Specify				#DIV/0!		
Specify				#DIV/0!		
Specify				#DIV/0!		
Total Grant Purchases	\$0.00	\$0.00	\$0.00	#DIV/0!		\$0.00
Reserve Fund				#DIV/0!		
Building Fund				#DIV/0!		
Total Expenses	\$956,999.05	\$75,898.29	\$856,999.05	7.93%		
Carryover from Previous FY	\$25,821.00	\$0.00	\$25,821.00	0.00%		\$0.00
Reserve/(Deficit)	(\$35,325.00)	\$285,488.06	\$26,624.00	-808.18%		

February 9, 2012

UPCOMING FISCAL YEAR BUDGET COMPARISON

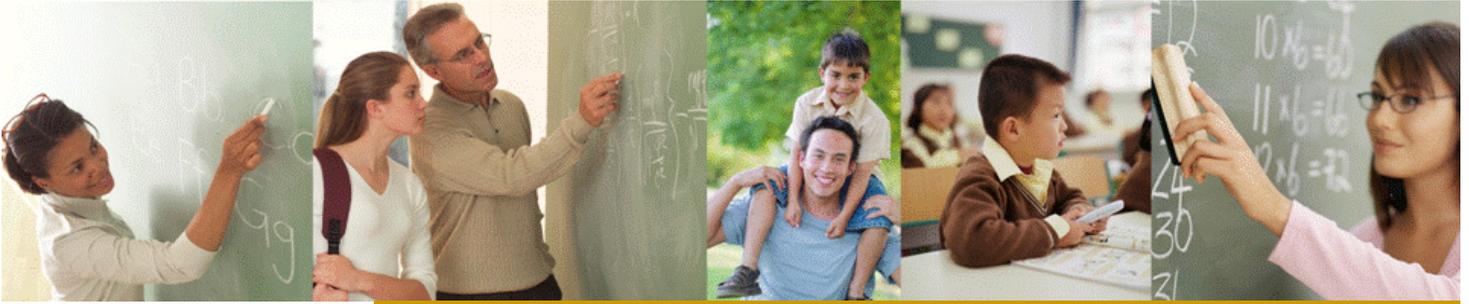
ENTER SDAVinci Charter School AND SUBMISSION DATE OF COMPLETED TEMPLATE	Proposed Budget	Notes	Difference from "Current Fiscal Year"
REVENUE			
Local Revenue	\$ 92,200.00		(\$6,750.05) reflects projected from "current FY"
State Revenue			
Entitlement	\$550,794.00	Projected on 160 students.	\$550,794.00 reflects State actual from "current FY"
Wages			
Administration			
Teachers	\$ 349,206.00	This figure includes all money coming from the state for wages	
Classified			reflects all salaries compared to State actual \$349,205.00 from "current FY"
Medicaid			(\$31,000.00) reflects projected from "current FY"
Benefit	\$ 62,997.00		\$38,051.00 reflects State actual from "current FY"
Transportation	\$ 38,051.00		\$38,051.00
Federal Revenue			
Title I	\$ 36,000.00		\$36,000.00 reflects State actual from "current FY"
Special Ed	\$ 29,562.00		#DIV/0! reflects State actual from "current FY"
Title II	\$ 5,000.00		\$5,000.04 reflects State actual from "current FY"
Startup Grant			#DIV/0! reflects State actual from "current FY"
Other Sources (Specify)	\$ 15,000.00	Lunch Program	
Other Sources (Specify)	\$ 8,000.00	Lottery	
Other Sources (Specify)	\$ 4,400.00	LEP & Remediation	
Total Revenue before holdback	\$1,191,210.00		#DIV/0!
PROPOSED HOLDBACK			
		Holdbacks should be estimated at a minimum of 5% - 5.5% for FY 2011.	
Teacher Salaries			
Classified Salaries			
Admin Salaries			
Benefits			
Entitlement			
Transportation			
Total Holdback	\$0.00		\$0.00 there were no holdbacks last year
Total Revenue after holdback	\$1,191,210.00		\$1,191,209.60 reflects State actual from "current FY"
EXPENDITURES			
100 Salaries			
Teachers	\$ 210,269.28		0.00 reflects projected from "current FY"
Admin	\$ 78,150.00		0.00 reflects projected from "current FY"
Classified	\$ 104,437.20		34,173.00 reflects projected from "current FY"
Special education	\$ 35,000.00		
Other (Specify)			
Other (Specify)			
Total Salaries	\$427,856.48		34,173.00
200 Benefits			
Benefit Dollars	\$ 157,884.57	All of our benefits, including taxes	
PERSI/Payroll taxes			
Other (Specify)			
Total Benefits	\$157,884.57		\$0.00 reflects projected from "current FY"
300 Purchased Services			
Transportation	\$ 41,000.00		\$0.00 reflects projected from "current FY"
Special Education	\$ 32,000.00		\$0.00 reflects projected from "current FY"
Proctor costs			
Legal	\$ 2,500.00		\$0.00 reflects projected from "current FY"
Insurance	\$ 6,000.00		\$0.00 reflects projected from "current FY"
Copier Lease			\$0.00
Printer Lease			\$0.00
Facility Lease	\$100,000.00		\$100,000.00 reflects projected from "current FY"
Utilities	\$ 20,000.00		\$0.00 reflects projected from "current FY"
Professional Development	\$8,835.00		\$6,335.00 reflects projected from "current FY"
Technology	\$8,500.00		\$0.00 reflects projected from "current FY"

February 9, 2012

UPCOMING FISCAL YEAR BUDGET COMPARISON

Management Services	\$ 11,000.00	SPECIAL PROGRAM PURCHASED SERVICES , Bank Charges, Service contracts, unexpected fee that don't have an area set up yet, BUSINESS OPER. MEALS ME	\$8,500.00	reflects projected from "current FY"
Legal Publications/Advertising	\$ 2,000.00		\$0.00	reflects projected from "current FY"
Substitute Teachers	\$ 3,600.00		(\$7,200.00)	reflects projected from "current FY"
Board Expenses	\$ 6,200.00	Audits	\$6,200.00	reflects projected from "current FY"
Other (Specify)				
Other (Specify)				
Total Purchased Services	\$241,635.00		\$113,835.00	
Supplies & Materials				
Teacher/Classroom	\$ 2,100.00		(\$6,900.00)	reflects projected from "current FY"
Office	\$ 1,500.00		\$1,500.00	Not in 2010 budget.
Janitorial	\$ 2,000.00		\$0.00	reflects projected from "current FY"
Textbooks	\$ 1,250.00		\$750.00	reflects projected from "current FY"
Other (Specify)				
Other (Specify)				
Total Supplies & Materials	\$6,850.00		(\$4,650.00)	
Grant Expenditures				
Specify				
Specify				
Specify				
Total Grant Expenditures	\$0.00			
Capital Outlay			\$0.00	
Total Capital Outlay	\$2,000.00		\$0.00	
Debt Retirement			\$0.00	
Total Debt Retirement	\$0.00		\$0.00	
Insurance & Judgements			\$0.00	
Total Insurance & Judgements	\$0.00		\$0.00	
Transfers			\$0.00	
Total Transfers	\$0.00		\$0.00	
Contingency Reserve	\$342,359.95			
Building Fund	\$0.00			
Total Expenditures	\$1,178,586.00		\$143,358.00	
Carryover from Previous FY	\$26,624.00	Reflects projected reserve/(deficit) from "current year" worksheet		
Reserve/(Deficit)	\$39,248.00			

February 9, 2012



EDUCATIONAL EFFECTIVENESS SURVEY™

Parent Edition V2.1

IBC - Garden City Community School

3/9/2011

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The Center for Educational Effectiveness



The Center for Educational Effectiveness

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Better Data. Better Decisions. Better Schools.

Introduction and Structure

While there is no single solution for all schools, research on effective schools identified common characteristics of high performing schools. The Office of the Superintendent of Public Instruction for the state of Washington, at the direction of Dr. Mary Alice Heuschel, Deputy Superintendent, along with teams from all nine Educational Service Districts in Washington, conducted a year-long meta-analysis of 20 years of effective school research to identify the characteristics of high performing schools. Successful schools who are engaged in improvement activities focus on these characteristics to create and improve the system(s) that drive the outcomes. This work was refined and published as the Nine Characteristics of High Performing Schools (Shannon and Bylsma, 2002).

Research Framework

The Center for Educational Effectiveness brought this research basis together with leading research on effective organizations, organizational trust, culturally responsive teaching, and attributes of effective instructional practice to create a formative and diagnostic tool designed to stimulate conversations within your school and district. This tool is the Educational Effectiveness Survey™ (EES), parent edition.

Structure of the EES Report

In order to simplify the material contained in this report, details on the research basis, the validity and reliability statistics, and other supportive material can be found in your EES-Users Guide (included in the binder with every report). If you cannot find this document, please notify CEE at info@effectiveness.org and we will email you a copy immediately.

CEE's primary concern is that this report be useful and informative in stimulating conversation. If you require any additional assistance in using your report, please contact us at info@effectiveness.org.



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Characteristics of High Performing Schools

While most schools focus on the **outcomes** they are reaching for, truly successful schools focus on organizational effectiveness and the programs and systems that drive and sustain improvement in the outcomes. The Educational Effectiveness Survey (EES), was developed to assist schools in continuous, sustainable improvement by helping schools understand their strengths and challenges in the areas known to impact the effectiveness of a school.

While there is no single solution for all schools, research on effective schools has identified 7 - 10 common characteristics of high performing schools (Marzano, 2003). Successful schools and schools engaged in improvement focus on these characteristics to create and improve the system(s) that drive the outcomes

Educational Effectiveness Survey™ Research Views									
Educational Effectiveness Survey (EES): Attributes	Clear and Shared Focus	High Standards and Expectations	Effective Leadership	High Levels of Collaboration and Communication	High Levels of Family and Community Involvement	Supportive Learning Environment	Frequent Monitoring of Teaching and Learning	Focused Professional Development	High Quality Curriculum, Instruction, and Assessment
Nine Characteristics of High Performing Schools (Shannon & Bylsma-WA OSPI)	P	P	P	P	P	P	P	P	P
Characteristics of Improving Districts (Shannon & Bylsma-WA OSPI)	I	I	I	I	I	I	I	I	I
Ten Qualities of Effective School Design (L. Darling-Hammond)	√	√	√	I	√	√	I	√	I
School Turnarounds (Center on Innovation & Improvement)	√	√	√	√	√	I	√	√	√
What Works in Schools (Marzano-ASCD)	√	I	√	√	√	√	√	√	√
Beat The Odds (Morrison Institute for Public Policy)	√	I	√	I	I	I	I	I	I
Turning Around Low Performing Schools (U.S. Dept. of Education)	√	√	√	√	√	√	√	√	√
P: Primary Research Definition					I: Implied				

Characteristic Definitions

To help schools identify and leverage these drivers and focus on what makes a school successful, the EES quantifies these characteristics. This results report contains a summary of the information your parent community provided on the EES survey form.

- **Clear & Shared Mission/Vision:** Everybody knows where they are going and why. The vision is shared, everybody is involved and all understand their roles in achieving the vision. The vision is developed from common beliefs and values, creating a consistent focus.
- **High Standards and Expectations:** Teachers and staff believe all students can learn and that they can teach all students. There is a recognition of barriers for some students to overcome, but the barriers are not insurmountable. Students become engaged in an ambitious and rigorous course of study.
- **Effective School Leadership:** Effective leadership is required to implement change processes within the school. This leadership takes many forms. Principals often play this role, but so do teachers and other staff, including those in the district office. Effective leaders advocate, nurture, and sustain a school culture and instructional program conducive to student learning and staff professional growth.
- **High Levels of Collaboration and Communication:** There is constant collaboration and communication between and among teachers of all grades. Everybody is involved and connected, including parents and members of the community, to solve problems and create solutions.
- **High Levels of Parent and Community Involvement:** There is a sense that all educational stakeholders have a responsibility to educate students, not just the teachers and staff in schools. Parents, as well as businesses, social service agencies, and community colleges/universities all play a vital role in this effort. It is essential that parents be informed and involved in decision-making to support their student's educational experience.
- **Supportive Learning Environment:** The school has a safe, civil, healthy and intellectually stimulating learning environment. Staff feel supported, respected and valued and students feel respected and connected with the staff, and are engaged in learning. Instruction is personalized and small learning environments increase student contact with teachers.
- **Monitoring of Teaching and Learning:** Teaching and learning are continually adjusted based on frequent monitoring of student progress and needs. A variety of assessment procedures are used. The results of the assessment are used to improve student performances and also improve the instructional program.
- **Curriculum, Instruction and Assessment Aligned with Standards:** Curriculum is aligned with the state standards for learning. Research-based materials and teaching and learning strategies are implemented. There is a clear understanding of the assessment system, what is measured in various assessments and how it is measured.

Using Your EES- A Quick Start Guide

The school improvement planning and transformation process is supported and driven by both quantitative and qualitative data. Data should be used to inform decisions, set goals, create school improvement plans and measure progress toward stated goals.

We are accustomed to looking at the outcomes-- particularly the outcomes that are published in the local newspapers (e.g. "high-stakes" test scores). Truly effective schools realize that these outcomes are influenced and driven by the Mission/Vision, Leadership, and Processes/Programs/Culture in place in their buildings and districts.

If you are just starting with your EES data, the following roadmap is recommended:

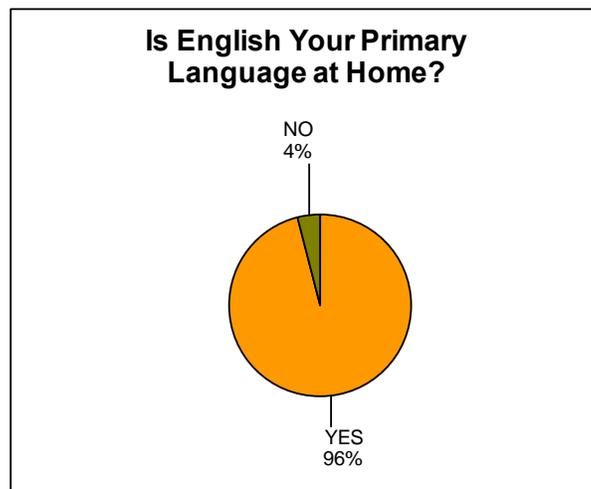
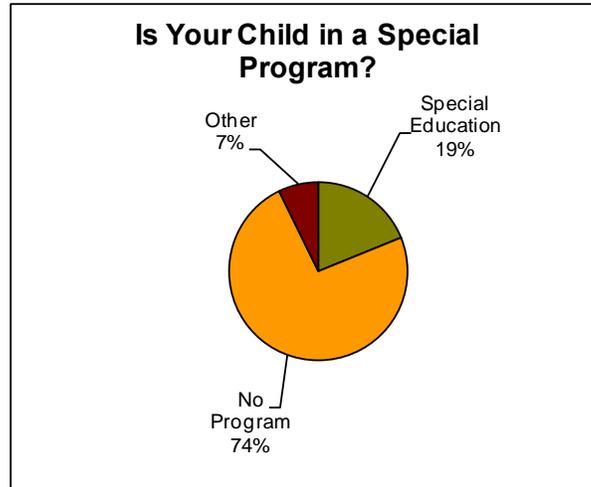
Who took the survey? Familiarize yourself with the demographics. Did you get a good sample of Parents? These charts set the stage by explaining who took the survey and their characteristics or contexts. *See page 7.*

Summary View: As a next step - spend a few moments looking at the overall view of each characteristic. Are there dramatic differences in positive and negative responses? *See page 8.*

Summary Comparison View: As a next step - spend a few moments looking at the radar graph which compares your school to the highest improving schools at your level. This enables you to have additional context in interpreting your results. *See page 9.*

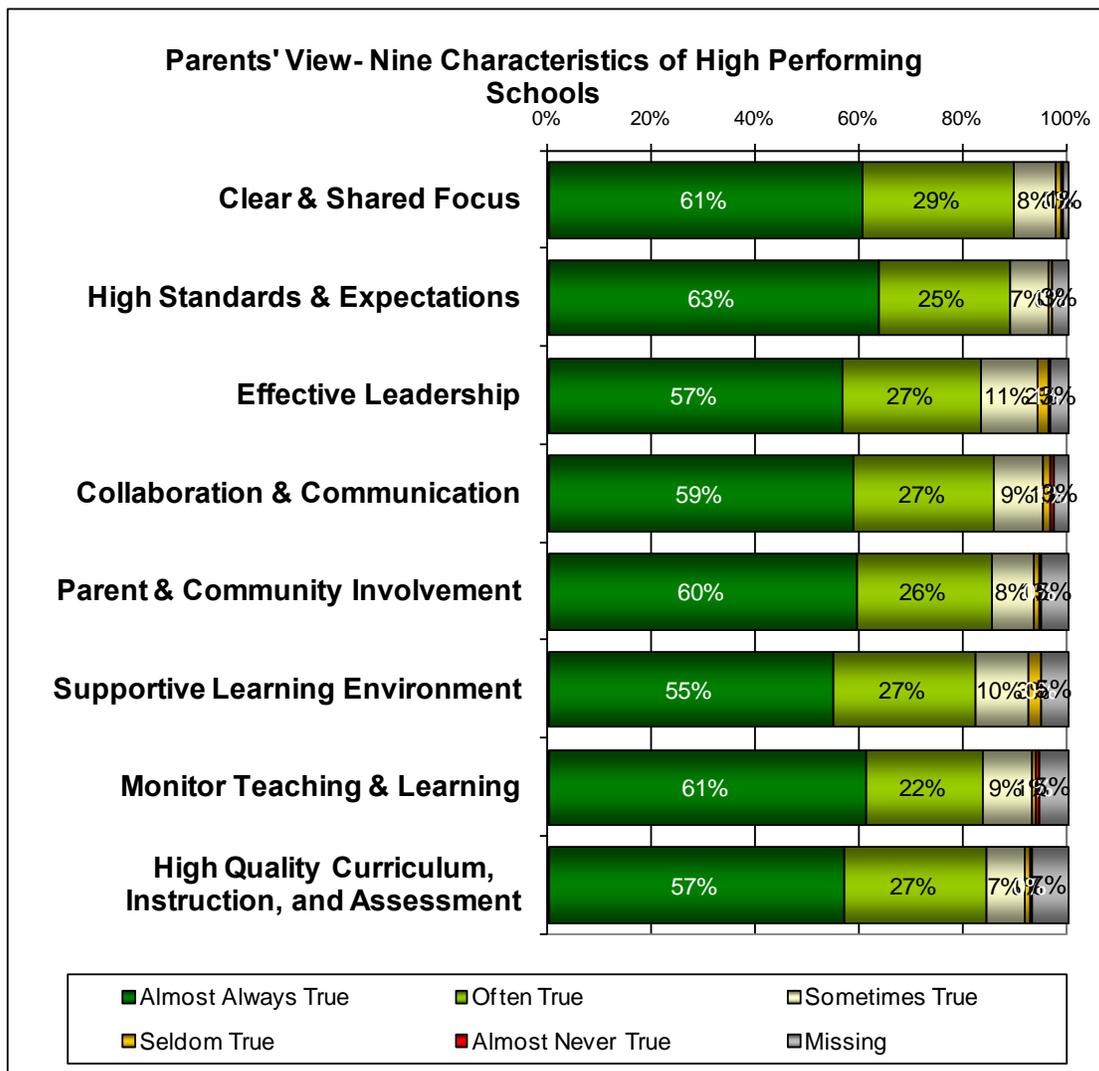
Characteristics of High Performing Schools: Characteristics which are consistently present in high performing schools. *See pages 10-17.*

Demographic Charts



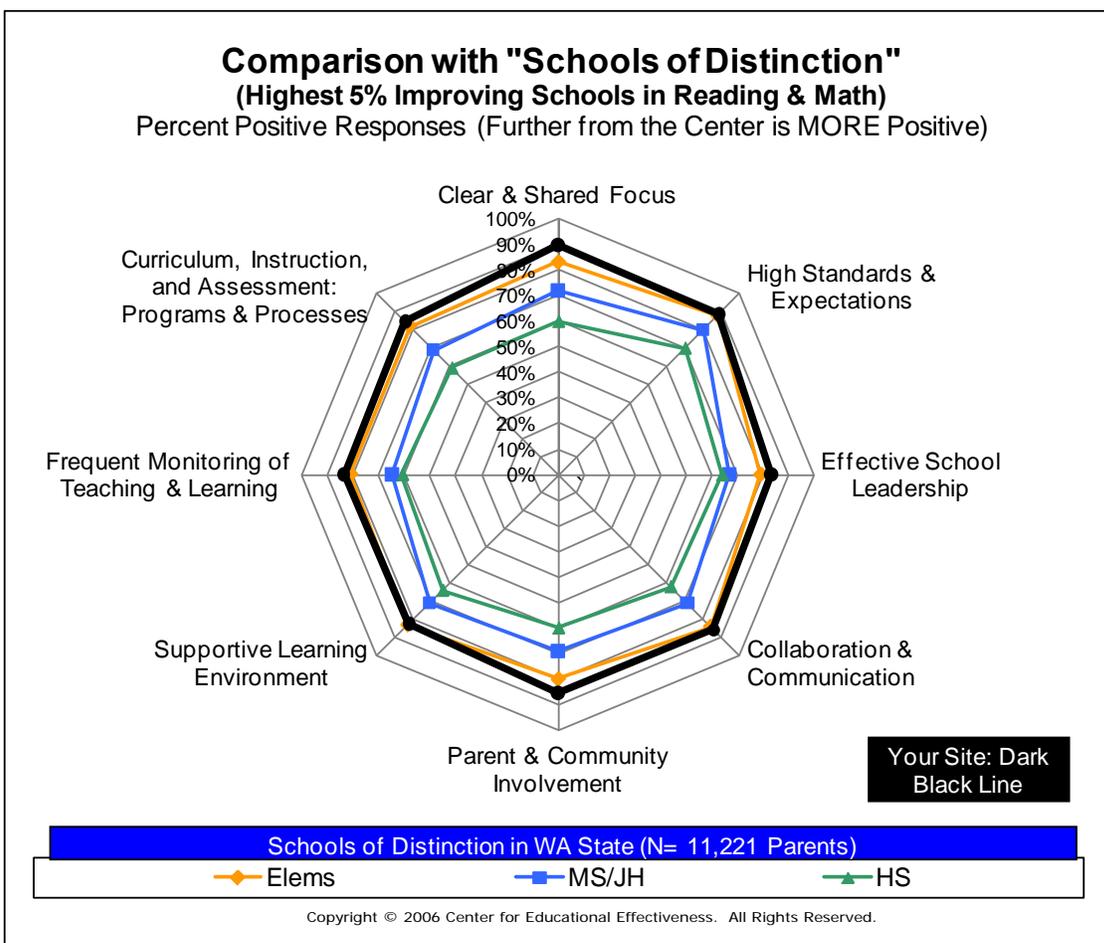
Summary Chart: Overall

This page summarizes your results on the Nine Characteristics of High-Performing Schools. As you look at these categories do you see one or two that indicate real strength as represented in significant green? Do you see one or two that lean more toward the negative values of orange and red? To further understand the meaning of this data you will need to review the breakdown of the individual items which comprise each of these categories. Those pages follow.



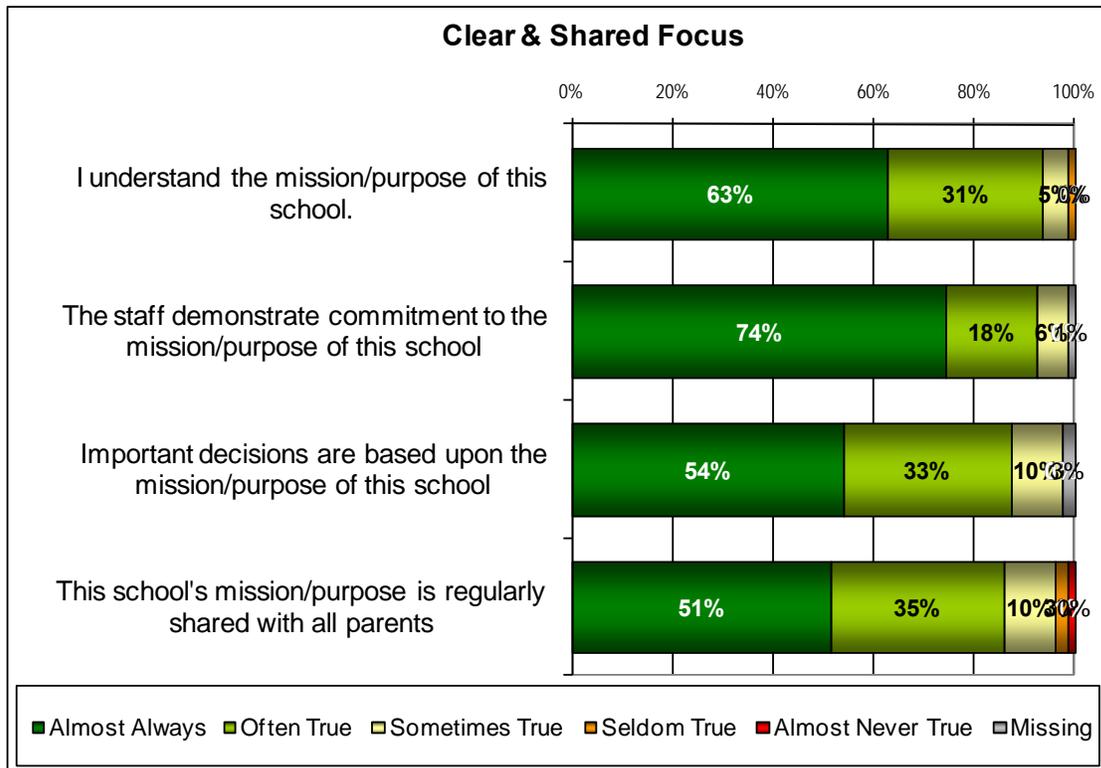
Summary- Comparison View

This chart compares the "characteristic summary" value (combined positives) for your school (shown in a solid black line) to the Schools of Distinction – elementary, middle and high school levels (shown in gold, blue, green). The Schools of Distinction are the 5% highest improving schools in the state of WA for 2010 as measured by the state Reading and Mathematics assessments over a 5-year period of time. For more information on the Schools of Distinction and the methodology used to identify those schools, see www.effectiveness.org.



Clear and Shared Focus

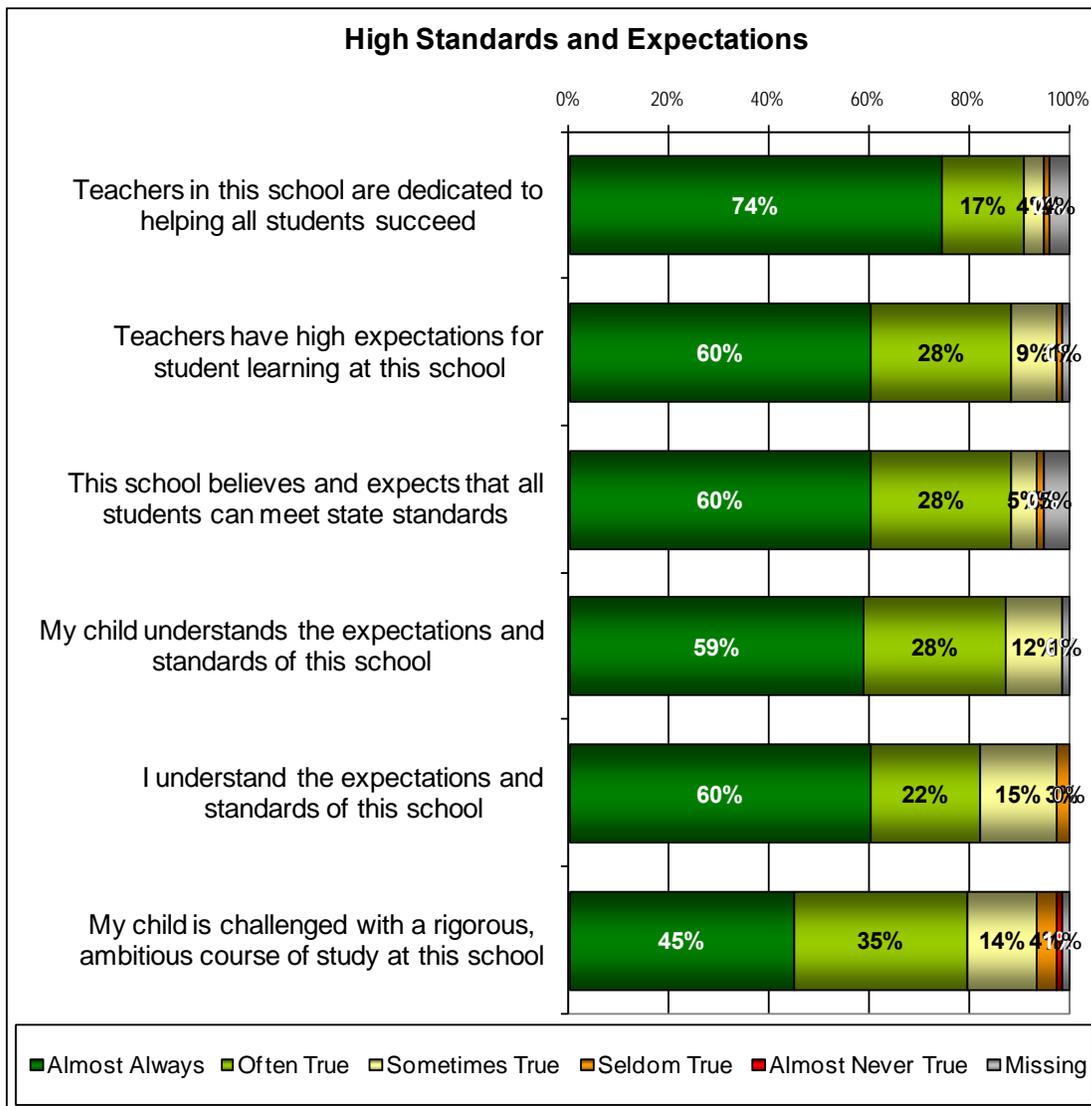
Effective schools are comprised of committed people (adults and students) who passionately embrace the vision and mission of education. They have a commitment to making a difference in the lives of their students and the communities from which they come. These schools are staffed with people whose purpose for working is for those they serve.



High Standards and Expectations

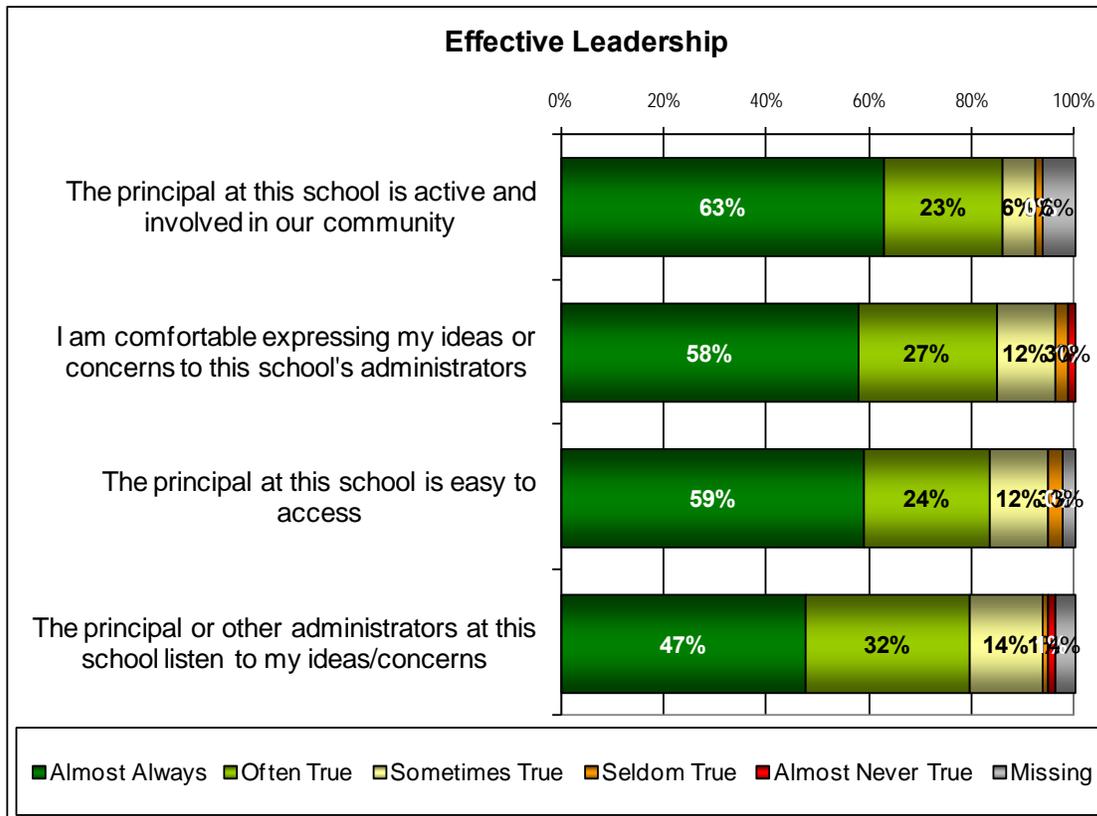
“Excellence” is a reflection of the personal discipline that staff members bring to their work. Schools that place a high emphasis on performance development and have a clear understanding of the distinction between experience and expertise are more likely to experience a commitment from staff to achieving performance excellence.

Teachers and staff believe all students can learn and that they have the skills and systems in place to teach all students. They hold one another accountable for student learning.



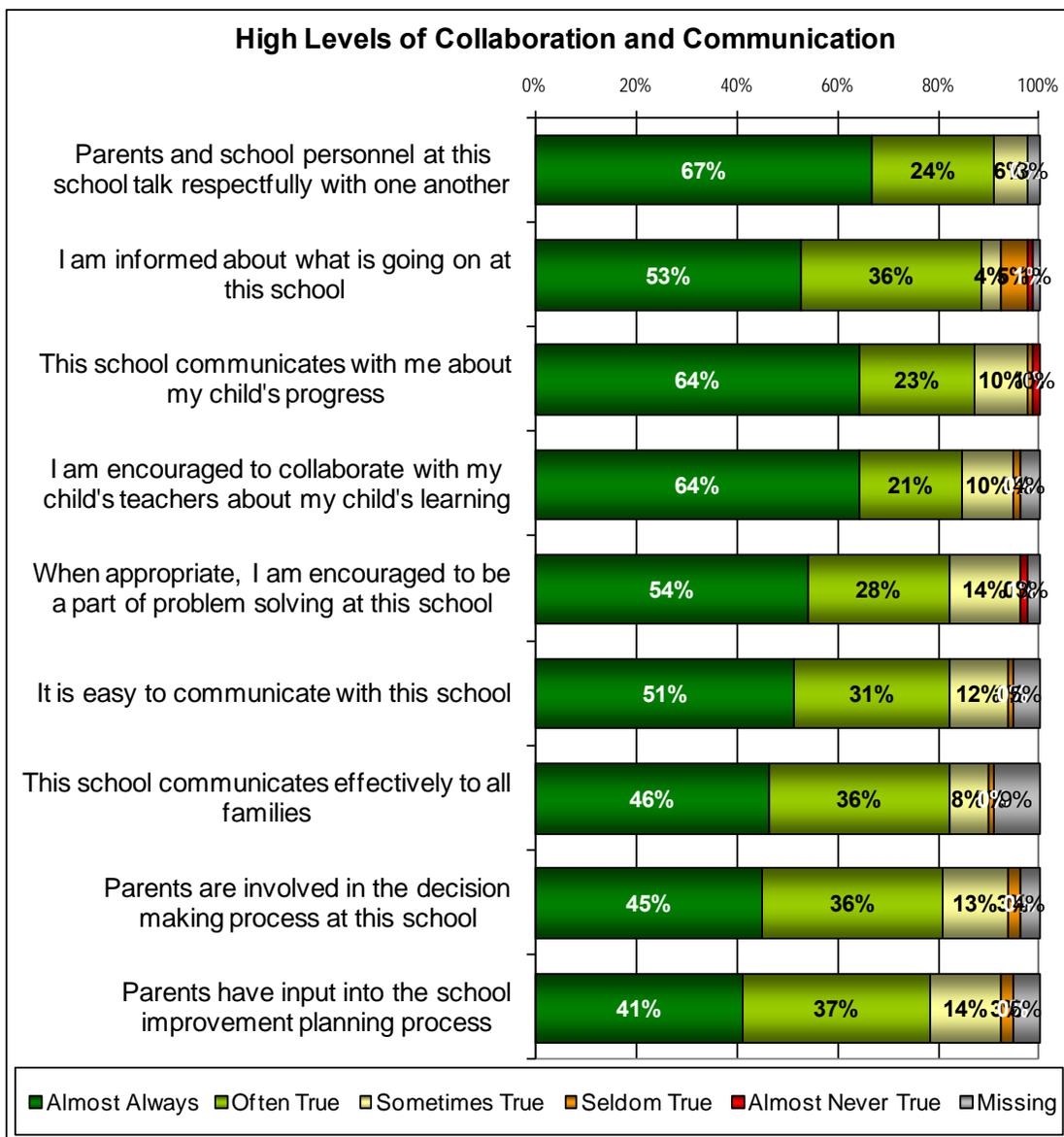
Effective Leadership

Effective leaders are committed to the core values of the school and district, and provide feedback and encouragement to achieve performance excellence. Effective leaders bring maturity, good judgment, strategic and critical thinking to the process of creating within the organization they lead, the increased capacity for success.



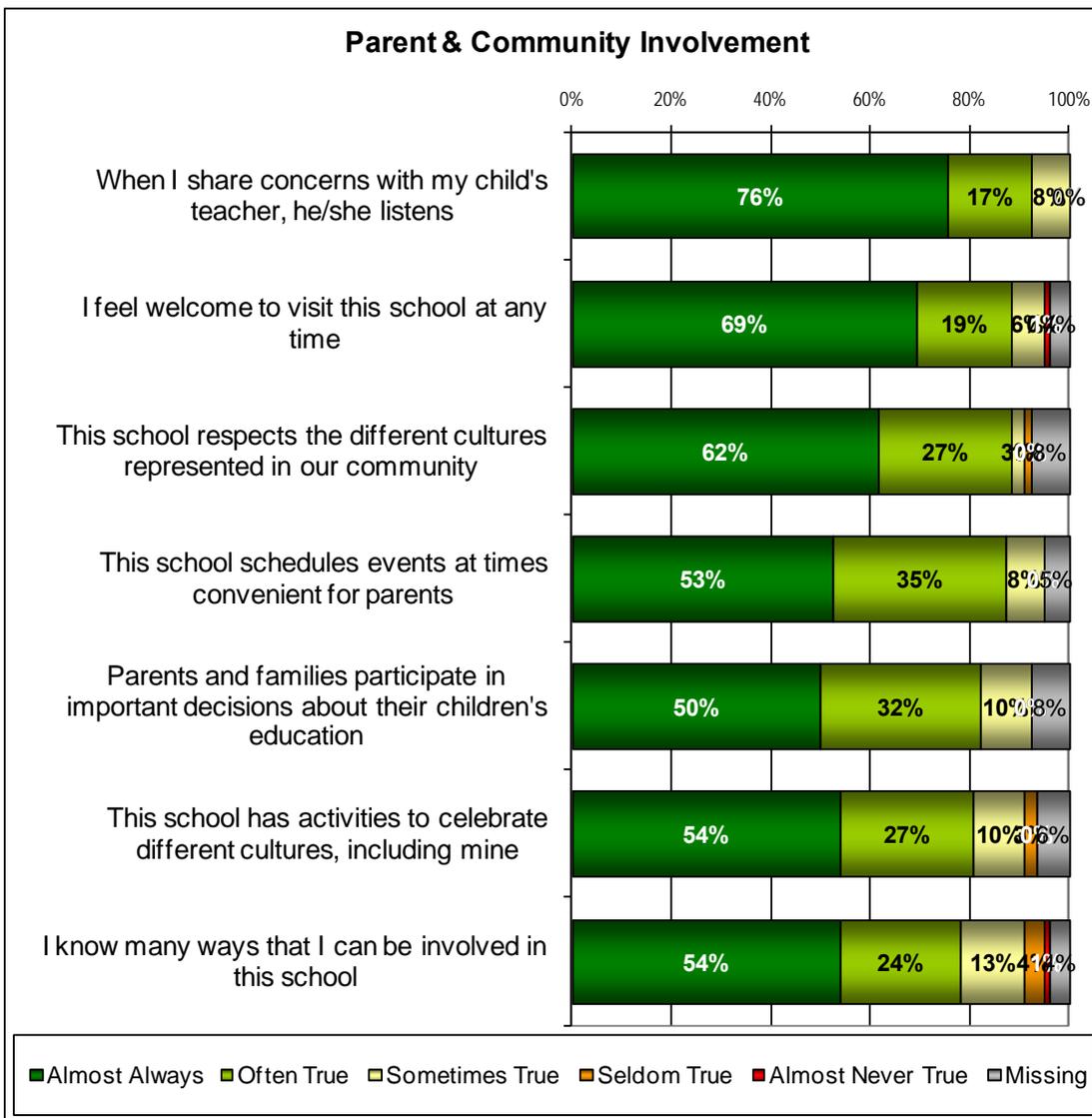
High Levels of Collaboration and Communication

Effective schools intentionally foster teamwork to create an environment that celebrates individual differences and contributions to organizational outcomes. Effective organizations and teams are a reflection of equal participation, substantive conversations, clear expectations, accountability, and continual feedback. There is constant collaboration and communication between and among teachers of all grades, students, and parents, families, or guardians. Everybody is involved and connected, including students, parents and members of the community, to solve problems and create solutions.



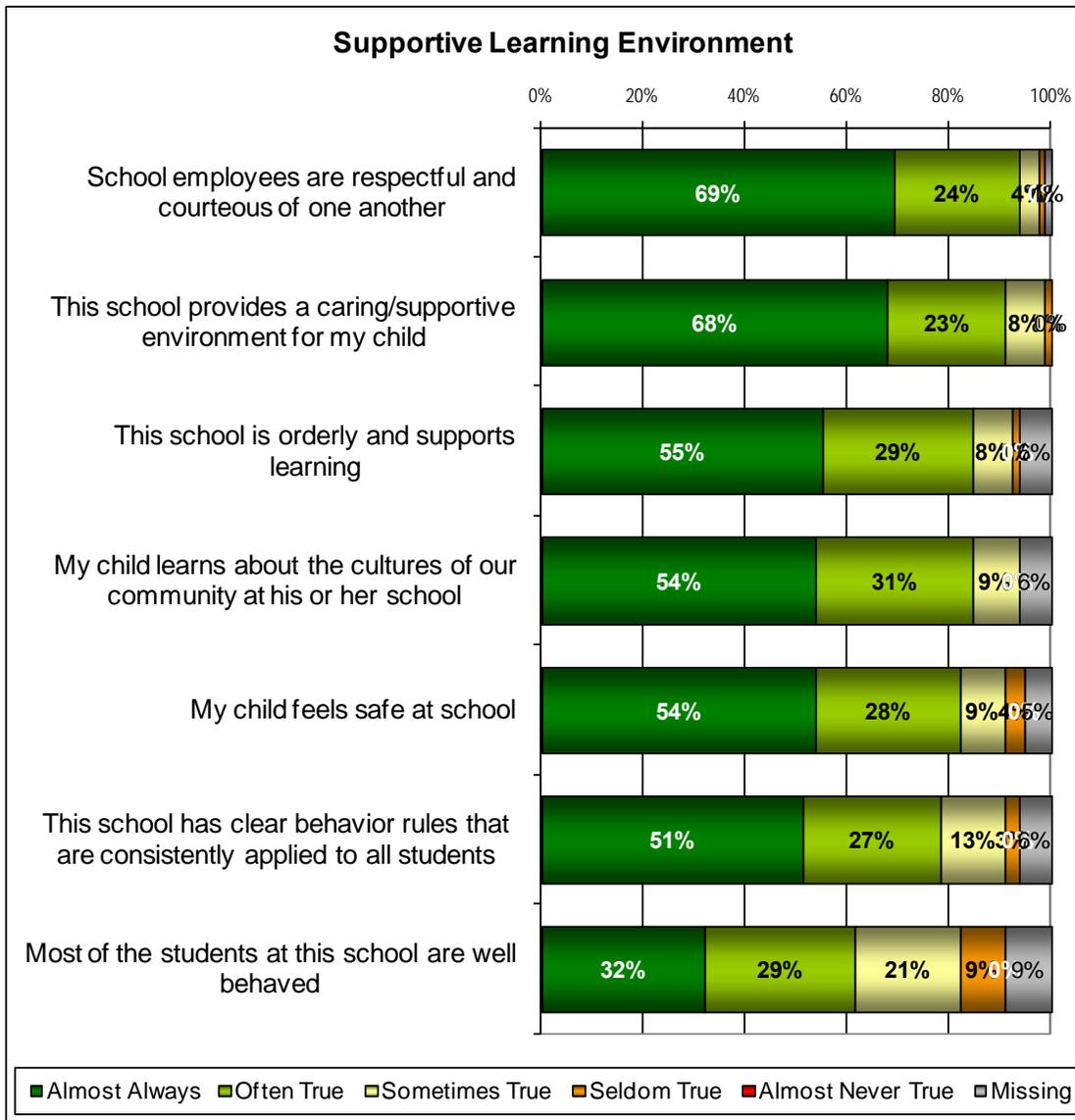
Parent and Community Involvement

Effective schools create and sustain high levels of parent and community involvement. There is a sense that all educational stakeholders have a responsibility to educate students, not just the teachers and staff in schools. Parents, as well as businesses, social service agencies, and community colleges/universities all play a vital role in this effort. It is essential that parents be informed and involved in decision-making to support their student's educational experience.



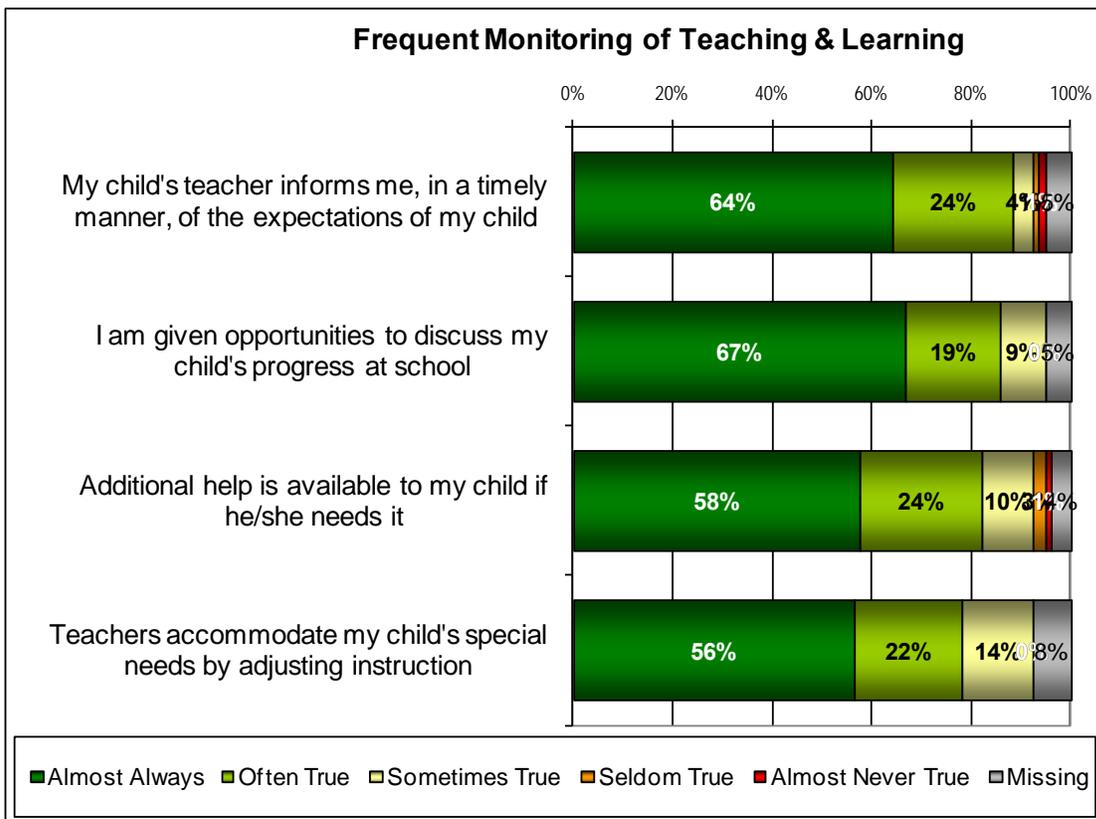
Supportive Learning Environment

The environment in which a staff works and students learn has a significant impact on the quality of educational work. Equality, safety, and a sense of fairness go a long way toward encouraging staff members to strive for excellence. A sense of community as distinct from being a team is another avenue to achieving organizational success, the pride and support of all staff members.



Frequent Monitoring of Teaching and Learning

Effective schools engage in constant, thorough, and rigorous monitoring of teaching and learning. Teaching and learning are continually adjusted based on frequent monitoring of student progress and needs. A variety of assessment procedures are used— both for monitoring adult work and student work. The results of the assessments are used to improve student performances and also improve the instructional program.



High Quality Curriculum, Instruction, and Assessment

Effective schools implement, with fidelity and rigor, high quality curriculum, instruction and assessment. Curriculum is aligned with the state standards for learning. Research-based materials and teaching and learning strategies are implemented. There is a clear understanding of the assessment system, what is measured in various assessments and how it is measured.

