

Cover Page

Heritage Academy

2011-2012 Idaho Charter School Petition

Name of Proposed Charter School: Heritage Academy, Inc.

School Year Petitioning to Open the Charter School: 2011-2012

School District Affected by Attendance Area: Jerome School District

Facility Location: Jerome, Idaho

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Table of Contents

Tab 1: Mission Statement, Corporate Organization, & Signatures of Proof	5
Vision Statement	5
Mission Statement.....	5
Signatures & Proof of Qualification.....	5
See, Appendix A – Qualified Electors	5
Tab 2: Proposed Operation and Potential Effects of Public Charter School	6
Target Student Population	6
Distinguishing Features	6
Potential Impact on District.....	8
Facilities	8
Administrative Services	12
Potential Civil Liability	14
Insurance	14
Tab 3: Educational Program; Goals, Definitions, Special Education, Plan for Dual Enrollment Participation, & Internet Safety Policy	15
Educational Philosophy & Purpose.....	15
Methods of Instruction.....	20
Educational Goals; Compliance with Idaho Code Ann. §33-1612	22
Definition of “Educated Person”	26
How Learning Best Occurs.....	27
Special Education Services.....	27
Plan for Dual Enrollment Participation.....	29
Services for Individuals with Limited English Proficiency.....	29
Services for Gifted & Talented Students	31
Tab 4: Measuring Educational Standards, Student Progress, Standardized Testing, Accreditation, NLCB Provision Regarding Plan for Improvement.....	32
Measurable Student Educational Standards	32
Measuring Student Progress I.C. 33-5205(3)(b)	33
Student Assessment I.C. 33-5205(3)(c)	33
Method for Providing Standardized Testing I.C. 33-5205(3)(d)	33
Assurance of State Accreditation I.C. 33-5203(3)(e) & IDAPA 08.02.140	34
Provision Regarding Plan for Improvement Under NCLB.....	34
Tab 5: Governance Structure, Parental Involvement, & Audits	35
Governance Structure	35
Parental Involvement	37
Financial and Programmatic Audits.....	39
Tab 6: Charter School Employees.....	40
Employee Qualifications.....	40

Health & Safety Procedures	40
Employee Benefits.....	41
Employee Transfer Rights.....	41
Collective Bargaining Provision	42
Teacher/Administrator Terms & Conditions of Employment	42
Employee Background Checks.....	42
Tab 7: Admission & Disciplinary Procedures.....	43
Projected Enrollment Capacity.....	43
Admission Procedures	43
Public Notification of Enrollment Opportunities.....	44
Enrollment Deadline.....	45
Equitable Selection, Over Enrollment & Waiting Lists	45
Disciplinary Procedures: Suspension, Expulsion, & Re-enrollment.....	47
General Discipline Guidelines for students with disabilities	48
Procedures for Abuse of Alcohol or Controlled Substances.....	49
Charter School Attendance Alternative.....	50
Habitual Truancy, Incurability & Disruptive Students	50
Student Handbook & Accessibility	51
Tab 8: Business Plan, Transportation, & School Lunch Program.....	52
Business Plan	52
Transportation Services Proposal.....	54
School Lunch Program Plan	54
Tab 9: Not Applicable	55
Tab 10: Arrangements, Additional Information Requests, & Plan for Termination	56
Business Arrangements & Partnerships	56
Additional Information Desired by Petitioners	56
Plan for Termination.....	56
Appendix A: Qualified Electors	57
Appendix B: Certificates of Charter School Workshop Attendance	65
Appendix C: Articles of Incorporation & Bylaws	67
Appendix D: Projected Budgets, Cash Flow, and Budget Assumptions	84
Best Case Budget	84
Worst-Case Budget	93
Appendix E: Board Member Resumes	108
Appendix F: Draft Student Handbook	116
Appendix G: Letter from North Side Bus Company, Inc.	136
Appendix H: Idaho Department of Education Sufficiency Review	137
Appendix I: Training/Professional Development Proposal from Renzulli Learning.....	146
Appendix J – Market Analysis	159

Appendix K – Letters of Intent to Lease/Sale	162
Appendix L – Modular Company Quotes	165
Appendix M – Supplemental Facility Information	173
Appendix N – Curriculum Selection	183

Tab 1: Mission Statement, Corporate Organization, & Signatures of Proof

Vision Statement

As a community of children, families, and educators, Heritage Academy believes that each individual has gifts, talents, and strengths. Our commitment to academic excellence will ensure that all students acquire the meta-cognitive skills and knowledge necessary to reach their highest potential and become responsible, respectful, and caring members of society. We will accomplish this by establishing high expectations, integrating enriched learning strategies for all students, and by promoting home, school and community partnership.

Mission Statement

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.

Signatures & Proof of Qualification

See, Appendix A – Qualified Electors

For Articles of Incorporation and corporate Bylaws, please reference Appendix C.

Tab 2: Proposed Operation and Potential Effects of Public Charter School

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. 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 project full enrollment of one class per grade in grades K-4 and one combined class 25 5th and 6th grade. It is our express intent to expand the grade offering at Heritage Academy to grades K-8 in subsequent years as determined by the board of directors. As our 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. The Primary Attendance Area will fall within the Jerome School District boundaries, but will be slightly smaller as defined below:

North Boundary: 900 North Road (Northern Jerome County Boundary)

East Boundary: 500 East Road

South Boundary: Golf Course Rd (700 South) (Southern Jerome County Boundary)

West Boundary: 500 West Road (Western Jerome County Boundary)

Distinguishing Features

A fundamental element of Heritage Academy is personal improvement. We realize that we live in a dynamic society where things are always changing. Heritage Academy’s goal is to seek out the best and incorporate it into our school. Emphasis will be placed on utilizing methods and ideas that are founded in research. The governing board will create a yearly plan that will address the goals and philosophy of the school. This will ensure the school focuses on its primary objectives and that all goals are consistent with the founder’s vision of the school. These goals will be reviewed bi-annually to assess progress and make revisions as necessary. Goals will be measurable and specific to easily identify achievement.

The administration and faculty will model our vision of personal improvement. Each employee will create a Professional Development Plan in which he/she will address interests and goals. These improvement plans will be an important part in evaluating a teacher's effectiveness. Specific expectations will be established to help an employee identify measurable goals, such as meeting Core Knowledge Curriculum goals and state standards. We will also encourage teachers to set personal interest goals based on research, continuing education and school leadership. Any areas for improvement identified by the administrator will also be addressed in this plan. Bi-annual review of these plans will allow for assessment and personal improvement. The goal of these assessments will be to provide teachers and faculty with feedback, encouragement and support.

As modeled at all levels, students will also participate in a Personal Improvement Plan program. With the help of teachers and parents, each student will create a plan and set goals for his/her education. Guidance will be provided to assist them in choosing age-appropriate and measurable goals, however students will be encouraged to be creative and explore personal interests. Specific goals will be set to ensure that all students are learning and meet established state standards. Measurement of some of these goals will be based on mastery of material and acceptable performance on established tests of skill and knowledge, however each student will also create a Total Talent Portfolio that will highlight achievement of goals and success that cannot be measured by tests. This portfolio will focus on achievement of character, leadership, self-confidence, and other important life-skills. It will be an opportunity for a student to showcase what they value individually. Total Talent Portfolios will also be used to form Enrichment Clusters. Portfolios and Improvement Plans will be reviewed twice a year to allow students, parents and teachers to assess progress and identify areas that need more attention. Students will learn to assess their own progress and accept responsibility for their accomplishments.

Parent involvement in a student's education is a high indicator of success. We believe parents are the best resource we have as a school and will expect them to participate in our Personal Improvement Plan program relative to their children's education. Parents are not required to complete this plan as a condition of their child's enrollment, but every effort will be made to encourage parent involvement in the program. At the biannual parent/teacher conference, parents will be asked to model appropriate goal setting and honest self-evaluation. Parents will be asked to complete a Personal Improvement Plan that will be included in the student's portfolio and will be reviewed at each conference. Parent goals should reflect their plans to support their child and be involved in his/her education. They should also identify specific ways the parents will support and be involved in the school community. They may include a commitment to help students be on time, to read with students every day, to volunteer in classrooms, to serve on the Governing Board or Parent Organization, etc.

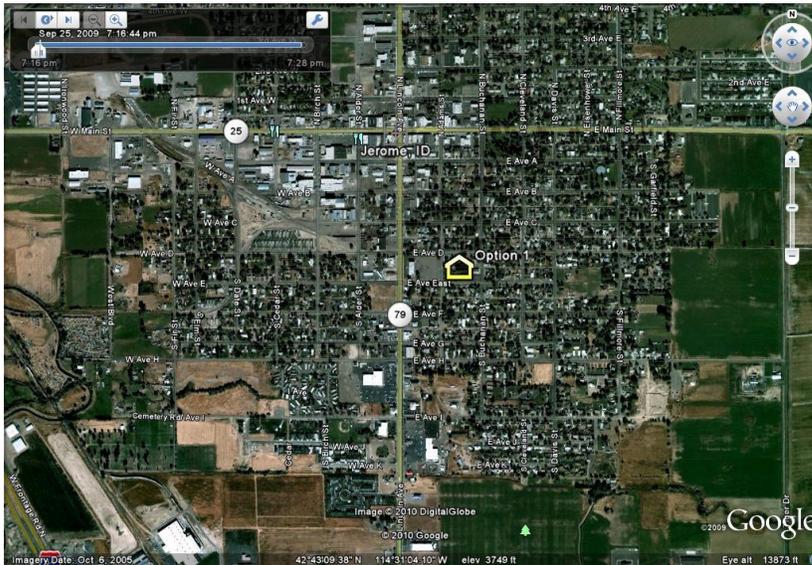
Potential Impact on District

No funding for Heritage Academy will be provided by Jerome School District or any other individual traditional school district funds. Jerome School district has the capacity to acquire additional funding through levies and bonds, regardless of the student population. While Jerome School District will not receive the ADA funding for students enrolled full-time at Heritage Academy, the School District will avoid the direct costs associated with providing educational services to students that choose to attend our school. There is a significant benefit to the School District as current economic trends may make it more difficult to budget for new school facilities and gain local taxpayer support for bonds and levies required for new school buildings. For example, Horizon and Jefferson Elementary schools both utilize portable classroom space because their facilities are too small to accommodate their students. This fact, coupled with the School District's recent failed bond levy, indicates that the addition of a new choice in public education would not only provide choice, but also relieve some of the strain placed on the district's resources. (For more information on the educational climate in our district/county, please see Appendix J – Market Analysis). There is no financial support that would be provided by the traditional School District for students that attend Heritage Academy. Further, as is often the case, Heritage Academy anticipates that many of the students that enroll at the school will come from a home-schooling background; a fact that will lessen the impact of the school on the district.

Facilities

As Heritage Academy founders, we recognize the importance of finding and preparing a school facility to house our program. We also acknowledge the challenges charter schools face when entering this phase of their development. While Heritage Academy, Inc. does not have the financial ability to secure land and finance the construction of a new school facility, we have identified several facility options.

Option 1. Over the past several months, we have worked to identify more



concrete options to locate our facility. During this process, we have worked with several land owners in an effort to specify our needs and reach agreement on terms that would be mutually beneficial. (See Appendix K for supporting documentation/letters of intent). Our first and best option in this regard would be

to enter into a short term land lease with a private school located on Lincoln Ave in the center of Jerome (See Option 1 on Map above). The school's board of directors have met, discussed, and voted to execute a letter of intent to sub-lease a portion of their campus to Heritage for \$1,000/per month for a minimum term of two years. (See Appendix K). As part of the process to assess this location's viability, we have discussed zoning requirements with the city. The location is already zoned Public or Semi-Public, and due to the fact that it is currently being used as a school, it already has a special use permit allowing this use. Another significant benefit is the fact that the vast majority of infrastructure is already in place. This will significantly reduce site prep and modular prep costs. We have contacted a modular classroom supplier to verify our transportation, set up, skirting, block and level, and monthly rental charges to set up our campus. These numbers are reflected in our budget and a supporting letter is attached in Appendix L. Our plan is to lease the eastern portion of the property to locate modular units. Due to city requirements, the fact that this site is already properly zoned, provides us with added convenience when planning our modular campus. In fact, the only city requirement for bringing on modular units will be paying for the permit. (We recognize there will be inspections and other similar costs, but we will not be required to seek specific council approval for our intended use.) The portion of the property we intend to utilize is a large unused parking area, with all curbing, sidewalk, and utilities on site. We recognize and have already considered one drawback to this location: confusion with the private school. However, because Jerome is a small community, we believe a joint effort with the private school, the district, and our founders will ensure that members of the community are informed of the distinction and their option to attend Heritage Academy.

Option 2. Another option is to purchase or lease land and contract with modular classroom supplier at Crossroads Point. We have been in negotiations with owners/investors that would be willing to assist us in the event that a purchase is necessary; however, after our discussions with the owners of Option 1, we are confident that this will not be necessary. In an effort to exhaust other options, we have contacted the developer of Crossroads Point in Jerome, Idaho, and he has expressed a willingness and excitement about the prospect of bringing a choice in public education to this development. Crossroads Point is located near the interchange of US Highway 93 and Interstate 84. This location will provide easy access to the student population that resides within Jerome and surrounding communities. Within this mixed use development, we have identified several potential sites for the school. In an effort to share open space and create a larger feel for the site, we have looked into the possibility of sharing designated park space with the city as well.



Heritage Academy will ensure that its school facility is designed and constructed to be accessible to and usable by individuals with disabilities. We have also contacted several modular classroom suppliers who have expressed their desire to submit proposals for our facility needs. We acknowledge that compliance with ADA guidelines is mandatory for any new (or remodeled) charter school facility, and we will ensure appropriate design decisions for accommodating the needs of disabled individuals as well as meeting all other applicable zoning and building code requirements.

In our community, there are many locations that are unimproved tracts of land at or near the necessary public utilities. Several of which have executed letters of intent to enter negotiations upon approval of our charter. A modular campus is most likely the best option for our first several years. Regardless of the option the board chooses, use of a facility as a public school is a conditional use in most zones. Several board members and founders have extensive experience with the city processes associated with conditional use permits as well as other permitting issues surrounding the development of land. Our budget assumptions reflect our estimates on the cost of erecting a small modular campus. Facility expenses include \$16,632 in estimated delivery costs, \$10,675 in skirting, \$3,150 for installation of handicap accessible ramps and handrails, \$18,515 for block and leveling, \$4,550 for anchors, \$127,127 for leased units beginning in August, and \$50,000 for necessary infrastructure and permitting.

Option 3 In the event we are unable to reach an agreement under options reference listed above or other circumstances preclude Heritage Academy from constructing a modular campus at that location, we have identified a second location to lease approximately 11,000 square feet on a potential classroom space. This location is easily accessible from Highway 93, provides ample parking, and the current owner is willing to make the necessary improvements in the event an acceptable lease term can be reached.



Option 4 For our fourth option, we have identified an alternative location off Lincoln St. at 900 South. This option provides more space and a lower cost per square foot than option 3, but the facilities would require tenant improvements to accommodate our needs. The facility consists of approximately 35,000 square feet, and could easily provide the needed space to operate our program. In our efforts to determine the feasibility of utilizing this space for our program, we have met with the owner's agent on several occasions and discussed the option of occupying only a portion of the building as the school. This would lower the costs associated with leasing the site and allow Heritage Academy to allocate additional monies to retrofitting the facility to meet our needs. This facility is located on a major arterial road running through the middle of Jerome and would provide a excellent access (ingress/egress) for residents in our community.



Administrative Services

Instructional Leader

Heritage Academy recognizes the principal as the key leader responsible for implementing institutional procedures and policies. The principal is accountable to the Board of Directors and is critical in the development of curriculum and educational programs. The success of the school in implementing its charter and creating an atmosphere for standards-based learning is critical to the role of the principal.

Principal's Responsibilities:

1. Establish and maintain a coordinated and challenging curriculum which implements an effective emphasis on technology integration.
2. Supervise administrative subordinates with an effective blend of delegation of authority, measures of accountability, and evaluation of results.
3. Implement effective student disciplinary procedures and oversee judicial hearings and appeals that conform to all relevant laws, policies and procedures.
4. Ensure administrative functions are successfully achieved, effective administrative procedures are developed, policies and school procedures are carried out, and strategic planning is continuous.
5. Interact and intercede for the needs of staff and/or students as needed.
6. Report to the board as required regarding:
 - staff communications
 - meeting coordination
 - parent interactions, and
 - staff information reviews.
7. Attend or conduct meetings of various constituent groups; attend school functions; attend external meetings, conferences, or legal training sessions.
8. Perform other duties as assigned by the Board of Directors.
9. Some duties may be shared/delegated to the Vice-Principal.

Because the principal plays a key role in the successful daily operation and overall performance of the school, Heritage Academy seeks the most qualified individuals for this position. An ideal candidate for the principal position at Heritage Academy would have the following background and education: (i) a graduate degree in educational administration and state certification as a K-12 principal or superintendent; (ii) Preferably a minimum of three years experience as a school administrator; and (iii) a Strong background/understanding of technology and technology instruction a plus. The principal position will be evaluated semi-annually by the Board, based on mutually agreed upon metrics and criteria.

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

organization that offers to contract for services to the school will resign as a Board Member prior to the Governing Board taking action to contract with that organization.

Preparation and Completion of Federal and State Reports

Under the Board's direction, the principal will provide timely completion and submittal of state and federal reports. Reports may be reviewed for approval by the Board before submission.

Head Secretary

The head secretary acts as a front-line information resource to students, faculty and staff, and must provide quality customer service to the public, students, parents and other Heritage Academy staff. The secretary will also work to assist and support the principal and faculty, and performs a variety of office duties requiring some independent judgment in the application of Heritage Academy policies and procedures. The basic requirements for this position will be a high school diploma, a minimum of three years of related experience, proficiency with Microsoft Word and Excel, databases, email and internet, and strong interpersonal and multi-tasking skills.

Potential Civil Liability

The Idaho Public Charter School Commission (the "IPCSC") shall have no liability for the acts, omissions, debts or other obligations of Heritage Academy.

Insurance

Heritage Academy Charter School will procure and maintain a policy of general liability insurance in the amount required by state law and errors and omissions insurance with limits not less than one million dollars. Heritage Academy will have the same role as a traditional public school in matters of civil liability. The appropriate insurance and legal waivers of all district liability and property insurance will be similar to the coverage purchased by the district. Heritage Academy will provide the IPCSC with a list of all other types and amounts of insurance required prior to the opening of the school.

Tab 3: Educational Program; Goals, Definitions, Special Education, Plan for Dual Enrollment Participation, & Internet Safety Policy

Educational Philosophy & Purpose

Heritage Academy is established to provide its students with a safe, challenging and individualized learning environment that will help them achieve their potential and become confident, competent, productive, and responsible young adults who possess the knowledge, skills, attitude, and character necessary to succeed in high school, post-secondary education, and ultimately in employment and community settings.

We believe that all students possess greatness within them, and educational experiences should guide and assist students in discovering the best within themselves. There are as many paths to success as there are individuals. Heritage Academy will provide a safe, challenging and individualized learning environment that will help each student reach his/her potential.

An individual builds confidence when he/she is free to explore and try new things without fear of teasing and/or harsh criticism. New and innovative ideas will only surface when individuals are allowed to try and experiment. In our society we need leaders who have learned the skills necessary to think and solve problems in creative ways. To create this safe environment we will foster a policy of zero tolerance for teasing, taunting, bullying and threats. Parents and students will sign a behavior contract that clearly identifies behavior expectations and consequences. Students, teachers, administrators, and parents will be expected to work together in an environment of mutual respect. As a school we will participate in the nationally recognized Character Counts program, which promotes the development of 6 pillars of character, trustworthiness, respect, responsibility, fairness, caring, and citizenship. This program will help students learn social skills, problem solving, and conflict resolution. By giving students clear behavior expectations and appropriate and effective tools they will learn to treat each other with kindness and respect. They will develop the confidence and skills needed to succeed in life when they are confronted with problems and conflict.

Competence develops when a learning environment is challenging and an individual is given an opportunity to grow and improve. With proper direction and motivation, individuals usually attain the level of greatness that is expected of them. To help each student reach his/her potential, greatness will be expected of

all students. This will be accomplished by utilizing The School-wide Enrichment Model (SEM).

An individual will be productive when given a foundation of knowledge and skills and the freedom to experiment and apply this information to the real world. The Schoolwide Enrichment Model emphasizes the application of knowledge and skills. This application involves participation in Enrichment Clusters (see Methods of Instruction) which produce products or services for the real world. When knowledge and skills are relevant to the student he/she will integrate into his/her life.

An individual who learns to set goals and assess personal accomplishment becomes responsible for his/her own learning and development. Heritage Academy recognizes the importance of providing students with an individualized learning environment, which facilitates personal responsibility by having students learn to set goals and assess progress through a Total Talent Portfolio.

The Schoolwide Enrichment Model, (Renzulli, 2010)

The Schoolwide Enrichment Model (SEM) is a detailed blueprint for total school improvement that allows each school the flexibility to allow each school to develop its own unique programs based on local resources, student demographics, and school dynamics as well as faculty strengths and creativity. Although this research-based model is based on highly successful practices that originated in special programs for the gifted and talented students, its major goal is to promote both challenging and enjoyable high-end learning across a wide range of school types, levels and demographic differences. The idea is to create a repertoire of services that can be integrated in such a way to create "a rising tide lifts all ships" approach. This approach allows schools to develop a collaborative school culture that takes advantage of resources and appropriate decision-making opportunities to create meaningful, high-level and potentially creative opportunities for students to develop their talents. SEM suggests that educators should examine ways to make schools more inviting, friendly, and enjoyable places that encourage the full development of the learner instead of seeing students as a repository for information that will be assessed with the next round of standardized tests. Not only has this model been successful in addressing the problem of students who have been under-challenged but it also provides additional important learning paths for students who find success in more traditional learning environments.

An Overview of the Enrichment Triad Model

The Enrichment Triad Model was designed to encourage creative productivity on the part of young people by exposing them to various topics, areas of interest, and fields of study, and to further train them to *apply* advanced content, process-training skills, and methodology training to self-selected areas of interest.

Accordingly, three types of enrichment are included in the Triad Model (see Fig. 2).

Type I enrichment is designed to expose students to a wide variety of disciplines, topics, occupations, hobbies, persons, places, and events that would not ordinarily be covered in the regular curriculum. In schools - that use this model, an enrichment team consisting of parents, teachers, and students often organizes and plans Type I experiences by contacting speakers, arranging minicourses, demonstrations, or performances, or by ordering and distributing films, slides, videotapes, or other print or non-print media.

Type II enrichment consists of materials and methods designed to promote the development of thinking and feeling processes. Some Type II training is general, and is usually carried out both in classrooms and in enrichment programs. Training activities include the development of: (1) creative thinking and problem solving, critical thinking, and affective processes; (2) a wide variety of specific learning how-to-learn skills; (3) skills in the appropriate use of advanced-level reference materials; and (4) written, oral, and visual communication skills. Other Type II enrichment is specific, as it cannot be planned in advance and usually involves advanced methodological instruction in an interest area selected by the student. For example, students who become interested in botany after a Type I experience might pursue additional training in this area by doing advanced reading in botany; compiling, planning and carrying out plant experiments; and seeking more advanced methods training if they want to go further.

Type III enrichment involves students who become interested in pursuing a self-selected area and are willing to commit the time necessary for advanced content acquisition and process training in which they assume the role of a first-hand inquirer. The goals of Type III enrichment include:

- providing opportunities for applying interests, knowledge, creative ideas and task commitment to a self-selected problem or area of study,
- acquiring advanced level understanding of the knowledge (content) and methodology (process) that are used within particular disciplines, artistic areas of expression and interdisciplinary studies,
- developing authentic products that are primarily directed toward bringing about a desired impact upon a specified audience,
- developing self-directed learning skills in the areas of planning, organization, resource utilization, time management, decision making and self-evaluation,
- developing task commitment, self-confidence, and feelings of creative accomplishment.

The Regular Curriculum

The regular curriculum consists of everything that is a part of the predetermined

goals, schedules, learning outcomes, and delivery systems of the school. The regular curriculum might be traditional, innovative, or in the process of transition, but its predominant feature is that authoritative forces (i.e. policy makers, school councils, textbook adoption committees, state regulators) have determined that the regular curriculum should be the 'centerpiece' of student learning. Application of the SEM influences the regular curriculum in three ways. First, the challenge level of required material is differentiated through processes such as curriculum compacting and textbook content modification procedures. Second, systematic content intensification procedures should be used to replace eliminated content with selected, in-depth learning experiences. Third, types of enrichment recommended in the Enrichment Triad Model (Renzulli, 1977) are integrated selectively into regular curriculum activities. Although our goal in the SEM is to influence rather than replace the regular curriculum, application of certain SEM components and related staff development activities has resulted in substantial changes in both the content and instructional processes of the entire regular curriculum.

The Enrichment Clusters

The enrichment clusters, one component of the Schoolwide Enrichment Model, are non-graded groups of students who share common interests, and who come together during specially designated time blocks during school to work with an adult who shares their interests and who has some degree of advanced knowledge and expertise in the area. The enrichment clusters usually meet for a block of time weekly during a semester. All students complete an interest inventory developed to assess their interests, and an enrichment team of parents and teachers tally all of the major families of interests. Adults from the faculty, staff, parents, and community are recruited to facilitate enrichment clusters based on these interests, such as creative writing, drawing, sculpting, archeology and other areas. Training is provided to the facilitators who agree to offer the clusters, and a brochure is developed and sent to all parents and students that discusses student interests and select choices of enrichment clusters. A title and description that appeared in a brochure of clusters in a school using the SEM follows:

Invention Convention

Are you an inventive thinker? Would you like to be? Brainstorm a problem, try to identify many solutions, and design an invention to solve the problem, as an inventor might give birth to a real invention. Create your invention individually or with a partner under the guidance of Bob Erikson and his students, who work at the Connecticut Science Fair. You may share your final product at the Young Inventors' Fair on March 25th, a statewide daylong celebration of creativity.

Students select their top three choices for the clusters and scheduling is completed to place all children into their first, or in some cases, second choice. Like extracurricular activities and programs such as 4-H and Junior Achievement,

the main rationale for participation in one or more clusters is that *students and teachers want to be there*. All teachers (including music, art, physical education, etc.) are involved in teaching the clusters; and their involvement in any particular cluster is based on the same type of interest assessment that is used for students in selecting clusters of choice.

The model for learning used with enrichment clusters is based on an inductive approach to solving real-world problems through the development of authentic products and services. Unlike traditional, didactic modes of teaching, this approach, known as enrichment learning and teaching (described fully in a later section), uses the Enrichment Triad Model to create a learning situation that involves the use of methodology, develops higher order thinking skills, and authentically applies these skills in creative and productive situations. Enrichment clusters promote cooperativeness within the context of real-world problem solving, and they also provide superlative opportunities for promoting self-concept. "A major assumption underlying the use of enrichment clusters is that *every child is special if we create conditions in which that child can be a specialist within a specialty group*" (Renzulli, 1994, p. 70).

Enrichment clusters are organized around various characteristics of differentiated programming for gifted students on which the Enrichment Triad Model (Renzulli, 1977) was originally based, including the use of major disciplines, interdisciplinary themes, or cross-disciplinary topics (e.g. a theatrical/television production group that includes actors, writers, technical specialists, costume designers). The clusters are modeled after the ways in which knowledge utilization, thinking skills, and interpersonal relations take place in the real world. Thus, all work is directed toward the production of a product or service. No lesson plans or unit plans are created in advance by the cluster facilitator; rather, direction is provided by three key questions addressed in the cluster by the facilitator and the students:

1. What do people with an interest in this area (e.g. film making) do?
2. What knowledge, materials, and other resources do they need to do it in an excellent and authentic way?
3. In what ways can the product or service be used to have an impact on an intended audience?

Enrichment clusters incorporate the use of advanced content, providing students with information about particular fields of knowledge, such as the structure of a field as well as the basic principles and the functional concepts in a field (Ward, 1960). Ward defined functional concepts as the intellectual instruments or tools with which a subject specialist works, such as the vocabulary of a field and the vehicles by which persons within the field communicate with one another. The methodology used within a field is also considered advanced content by Renzulli (1988a), involving the use of knowledge of the structures and tools of fields, as

well as knowledge about the methodology of particular fields. This knowledge about the methodologies of fields exists both for the sake of increased knowledge acquisition, and also for the utility of that know-how as applied to the development of products, even when such products are considered advanced in a relative sense (i.e. age, grade, and background considerations).

The enrichment clusters are not intended to be the total program for talent development in a school, or to replace existing programs for talented youth. Rather, they are one vehicle for stimulating interests and developing talent potentials across the entire school population. They are also vehicles for staff development in that they provide teachers an opportunity to participate in enrichment teaching, and subsequently to analyze and compare this type of teaching with traditional methods of instruction. In this regard the model promotes a spill-over effect by encouraging teachers to become better talent scouts and talent developers, and to apply enrichment techniques to regular classroom situations.

Methods of Instruction

Heritage Academy will use a variety of methods to help our students become confident, competent, productive and responsible citizens. The Schoolwide Enrichment Model (SEM) will assist us in designing a program to help our students reach their potential.

Through his studies of the challenging, creative lessons developed for gifted students, Dr. Renzulli became convinced that this type of learning could benefit all students. Over 20 years of research led to the development of this model to improve instruction for an entire school. SEM applies the “a-rising-tide-lifts-all-ships” theory by integrating high-end learning into the total school program. SEM consists of three interacting dimensions. The first component, The Total Talent Portfolio (TTP) involves systematically gathering information about student’s abilities, interests, and learning styles and then utilizing this information to help students set personal goals and design enrichment activities.

The second component involves Curriculum Modification Techniques. A student’s mastery of specific curriculum is assessed, and when mastery is achieved students are provided with alternate activities such as group or individual projects, peer teaching, or more in-depth study of curriculum material. Curriculum Modification may also include ability grouping, so that students’ learning is based on capability. As students are assessed to determine understanding and ability, teachers will have the information they need to teach more effectively. Students who have not mastered material will also be identified so that their needs can be addressed. Teachers will be able to re-teach the material in a different way, provide extra support or practice, utilize a peer teacher or adult mentor, and/or work with these students more closely. This will help teachers identify and resolve potential problems quickly.

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.

Heritage Academy will provide a solid foundation through adopted curriculum in the core content areas that will be a guide to help each student on a path of personal discovery. This knowledge will be given relevance when it is given practical application in Enrichment. We value the individual. Every student has tremendous potential and talents. Our goal is to help students identify and build on what is already great within them

Educational Goals; Compliance with Idaho Code Ann. §33-1612

Title 33-1612 of the Idaho Code statutorily defines eight “thoroughness standards” used to define and establish the basic assumptions which govern the provision of a uniform public education. Heritage Academy will meet and fulfill each of these standards as follows:

Standard	Goal	Objective
<p>Standard 1: A safe environment conducive to learning is provided.</p>	<p>Maintain a positive and safe teaching and learning climate. Every student has the right to attend a school that encourages positive and productive learning, provides a save and orderly environment, and promotes student respect for themselves and others.</p>	<p>Heritage Academy will:</p> <ol style="list-style-type: none"> 1. Develop guidelines for physical safety. These guidelines will include, but not be limited to, the procedures for fire drills, reporting unsafe equipment, methods for checking students in and out of school, notification of parents’ rights and staff monitoring responsibilities. 2. Provide a facility and adopt policies that meet all required city, state, and federal health accessibility, safety, fire, and building codes for public schools. 3. Establish, publish, and enforce policies that define acceptable and unacceptable behavior, including zero tolerance for weapons, violence, gangs, and use or sale of alcohol and drugs. 4. Create an environment that strongly encourages parents and other adults to visit the school and participate in the school’s activities.

<p>Standard 2: Educators are empowered to maintain classroom discipline.</p>	<p>Create a positive teaching and learning environment with an emphasis on high expectations of behavior and academic performance.</p>	<p>Heritage Academy will:</p> <ol style="list-style-type: none"> 1. Adapt the policies into a student handbook providing a code of conduct including clear expectations and consequences for unacceptable behavior. 2. There will be school wide process for teachers to handle minor and major infractions in the classroom setting. 3. Teach appropriate behaviors and foster responsible decisions-making skills. 4. Establish and maintain consistent rules aligned throughout the school.
<p>Standard 3: The basic values of honesty, self-discipline, unselfishness, respect for authority, and the central importance of work are emphasized.</p>	<p>Offer opportunities for students to develop and express exemplary character traits in concert with the overall educational program.</p>	<p>Heritage Academy will:</p> <ol style="list-style-type: none"> 1. Utilize the general philosophy of the character education program throughout all decisions to instill appropriate values. 2. Emphasize the importance of adults modeling important values at school. 3. Help student build personal bonds and carry out responsibilities to one another and to the faculty and staff. 4. Develop a sense of community and service within the school, and between the school and the larger community. Community service

		<p>instills a sense of individual, social, and civic responsibility and enables the student to use newly found knowledge to solve community problems.</p>
<p>Standard 4: The skills necessary to communicate effectively are taught.</p>	<p>Teach students a range of effective communication skills appropriate for the 21st century.</p>	<p>Heritage Academy will:</p> <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.
<p>Standard 5: A basic curriculum necessary to enable students to enter academic or professional-technical post-secondary educational programs is</p>	<p>Develop an educated citizenry for the 21st century through a proven academic program where all students are offered an advanced curriculum.</p>	<p>Heritage Academy will:</p> <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.

<p>provided.</p>		
<p>Standard 6: The skills necessary for the students to enter the workforce are taught</p>	<p>Provide students with the intellectual foundation and strong moral compass that provide the character traits of leadership, which lead them to becoming productive citizens.</p>	<p>Heritage Academy will:</p> <ol style="list-style-type: none"> 1. Provide a strong foundation in reading, writing, problem solving, math concepts, science, social studies, history and literature. 2. Provide a technology oriented environment, encouraging the use of technology as a toll in the workplace of the 21st century. 3. Enable the students to develop the following intellectual habits important in society: adapting to new situations and responding effectively to new information; solving problems, locating and evaluating information from a variety of sources; making flexible connection among various disciplines of thought; thinking logically and making informed judgments. 4. Enable students to develop the following personal habits important in society; accepting responsibility for personal decisions and actions; honesty, courage, and integrity, a healthy lifestyle; empathy, courtesy, and respect for differences among people; self-confidence; concentration and perseverance; responsible time management; assuming a fair share of the work load; and working cooperatively with others to reach group consensus.
<p>Standard 7: The students are introduced to current technology.</p>	<p>Provide students with a technology environment using tools such as computers, scientific equipment, and networks linked to local and nationwide</p>	<p>Heritage Academy will:</p> <ol style="list-style-type: none"> 1. Use technology as a tool in an integrated educational program rather than as a primary instructional delivery system. 2. In 4th grade and above, all

	resources.	<p>students leaving Heritage Academy will be proficient in using both a word processing and a spreadsheet program after two years of continuous enrollment at the school.</p> <p>3. Use computers as tools for such activities as accessing research information, authoring, computation, record keeping, data storage, and communication.</p>
<p>Standard 8: The importance of students acquiring the skills to enable them to be responsible citizens of their homes, schools, and communities is emphasized.</p>	<p>Provide students with the skills and the intellectual foundation to become responsible citizens in our society.</p>	<p>Heritage Academy will:</p> <ol style="list-style-type: none"> 1. Enable students to develop the following personal habits important in society; accepting responsibility for personal decisions and actions; honesty, courage, and integrity, a healthy lifestyle; empathy, courtesy, and respect for differences among people; self-confidence; concentration and perseverance; responsible time management; assuming a fair share of the work load; and working cooperatively with others to reach group consensus. 2. Enable students to understand and apply concepts and principles embedded in each of the social science: history, geography, political science and economics.

Definition of “Educated Person”

An “educated person” in the 21st century demonstrates the ability to recognize his or her strengths, while continuously learning and applying new information to a variety of situations. An educated person is someone who is able to think critically, one who is excited about learning, can solve problems, looks forward to challenges and has fully developed his or her interests. An “educated person” looks forward to engaging in academic and career opportunities and has developed self-discipline and self-reliance. The Founding Board of Heritage Academy believes that an educated person has developed personal strengths, character traits and a strong foundation in each content area that enables him or

her to participate in academic, career, social and civic responsibilities and make ongoing positive contributions to his or her family and community.

How Learning Best Occurs

Students at Heritage Academy are valued. Each student has unique talents and abilities and learns in different ways. We are educating the future of our society and not simply trying to have students test for competency. Traditional educational practices no longer provide students with all the necessary skills to compete in today's workplace. Students must apply new strategies for solving problems using appropriate tools for learning, collaborating, and communicating. The following chart shows characteristics representing traditional approaches to learning and corresponding strategies that will be supportive of innovative teaching methods at Heritage Academy.

We believe an individual learns best when they are able to build confidence by being free to explore and try new things without fear of teasing and/or harsh criticism. New and innovative ideas will only surface when individuals are allowed to try and experiment. In our society we need leaders who have learned the skills necessary to think and solve problems in creative ways. To create this learning environment we will foster a policy of zero tolerance for teasing, taunting, bullying and threats. Parents and students will sign a behavior contract that clearly identifies behavior expectations and consequences. Students, teachers, administrators, and parents will be expected to work together in an environment of mutual respect. As a school we will participate in the nationally recognized Character Counts program, which promotes the development of 6 pillars of character, trustworthiness, respect, responsibility, fairness, caring, and citizenship. This program will help students learn social skills, problem solving, and conflict resolution. By giving students clear behavior expectations and appropriate and effective tools they will learn to treat each other with kindness and respect. They will develop the confidence and skills needed to succeed in life when they are confronted with problems and conflict.

Special Education Services

Heritage Academy will utilize the Idaho Special Education Manual as now adopted or as amended in the future as a guideline for its special education program and will comply with the requirements of the Individuals with Disabilities Education Act (IDEA), Section 504 of the Rehabilitation Act and all federal regulations dealing with these areas. The Primer on Special Education in Charter Schools, reprinted in October 2007 will be a valuable resource to the administration and faculty. The Idaho Special Education Manual will be used to plan and implement the special education program at Heritage Academy. The Heritage Academy administrator in conjunction with the Special Education

teacher will be the Section 504 Compliance Officer. Heritage Academy will follow the procedures and requirements outlined below:

- *Nondiscriminatory enrollment procedures.* Heritage Academy will not deny enrollment to a student with a disability solely because of that student's need for special education or related aids and services. Students with disabilities have the opportunity to meet the minimum eligibility criterion for enrollment described in this Charter petition, consistent with the mission of Heritage Academy and civil rights requirements.
- *Child Find activities and evaluations.* Heritage Academy will conduct Child Find activities and evaluations as described in the IDEA Manual. Child Find activities will be limited to the students enrolled in Heritage Academy.
- *Meet LRE requirements.* Heritage Academy will provide special education and related services to eligible Heritage Academy students in the Least Restrictive Environment as identified by each student's IEP. Heritage Academy's IEP team, inclusive of the parent, will be responsible for identifying and providing the LRE as outlined in the IEP.
- *Protect student and parent rights.* Heritage Academy will be responsible to protect student and parent rights as described in the Idaho Special Education Manual and in associated state and federal laws and regulations.

A student referral process will be in place and understood by parents and faculty. Evaluation and services will be as follows:

- Heritage Academy will form a multidisciplinary team to consider a student's eligibility for special education. If a team determines the need for an evaluation by other personnel, such as a school psychologist, speech therapist, or occupational therapist, not currently employed by the school, such evaluations will be contracted with a private provider. All evaluation and eligibility requirements will be followed and parents will be notified of their due process rights.
- Disciplinary problems by special education students will be assessed by the multidisciplinary team. Teachers and administrators will follow the Idaho Special Education Manual (as currently defined in Chapter 12 of the Special Education Manual) to address these issues.
- The delivery of instruction for students with disabilities, and the monitoring of that delivery of instruction will be provided by personnel who meet highly qualified criteria along with requirements of IDEA. Instructional

services will follow the Individual Education Plan (IEP) and will be provided in the least restrictive environment as defined by each student's IEP. A paraprofessional, under the direct supervision of highly qualified special teacher, may be used to support instruction as allowed by IDEA. The special education teacher will consult with the general education staff to utilize effective classroom interventions, adaptations, and modifications. The special education teacher is responsible for writing the IEP, with the IEP team, and monitoring IEP goals.

- Heritage Academy will contract with a private provider for the provision of related services. Direct speech, language, or OT services may be provided by a paraprofessional under the direct supervision of a licensed therapist. In the event that the IEP team determines that the student's academic needs cannot be met on site, Heritage Academy will provide services in the least restrictive environment complying with PL 94-142.

In compliance with the Americans with Disabilities Act (ADA), Heritage Academy ensures that its facility and program, when viewed in its entirety, is readily accessible to and usable by individuals with disabilities. Heritage Academy ensures that its facilities will meet the standards specified in Title II of the ADA and Section 504 of the Rehabilitation Act.

Heritage Academy will transport any special education student enrolled at the school who may, because of the nature of their disabilities, be entitled to specialized transportation as a related service.

Heritage Academy will notify the Idaho State Charter School Commission in the event that a formal complaint or due process hearing request is filed by or on behalf of a Heritage Academy student. Appropriate Heritage Academy personnel will participate in the resolution of any formal complaint or request for a due process hearing.

Plan for Dual Enrollment Participation

Students enrolled in Heritage Academy shall be allowed to participate in dual enrollment with traditional public schools as required by Idaho Code § 33-203. Dual enrollment options will be subject to district procedures as allowed in Idaho Code 33-203 (1).

Services for Individuals with Limited English Proficiency

Heritage Academy recognizes the diversity within the Jerome community and within the Magic Valley. The founders and governing board of Heritage Academy seeks to mirror that diversity within the charter school community by advertising enrollment opportunities in a variety of locations, formats and in English, Spanish

and other languages. The Heritage Academy will develop a robust program of instruction for English Language Learners. The school will focus on providing a culture and climate that values students from different backgrounds and that provides students and their parents with opportunities to engage in the school community.

Heritage Academy will apply the federal definition of Limited English Proficient (LEP) as defined in Title III and IX of the ESEA. Students who are eligible for the LEP program will participate in the LEP program according to state and federal guidelines. State and federally mandated testing of LEP students will be administered. The *Guidance for Evaluating Limited English Proficient (LEP) Students to Establish Special Education Eligibility*, provided by the Idaho Department of Education, will be used for identifying Special Education LEP students.

Heritage Academy will follow the Idaho LEP Program guide and administer the Idaho English Language Assessment (IELA) for student placement as well as monitor student growth. The following guidelines will be used for the Home Language Survey in order to identify Primary Home Language Other Than English (PHLOTE) students.

Home Language Survey (HLS)

- Registration cards will include the question: What is the primary language spoken in the home?
- If a response is any language other than English, a survey will go home to the parents.
- If the district has Native American students enrolled, the survey will include the following questions: Is the student's language influenced by the Tribal language through a parent, grandparent, relative or guardian? Does the student have at least one grandparent that is part of a federally recognized tribe?
- If the survey comes back indicating that a student maybe Limited English Proficient (LEP), the student will be tested with an English language proficiency test within 30 days of registration or within 2 weeks of entry into the school (if during the year.)
- If the student tests less than proficient on the English language proficiency test, then a letter will go home to the parents indicating that their child was identified as needing specific English language services. The parent will be given the opportunity to waive the services, if desired.
- If the parent does not waive the Limited English Proficiency (LEP) services for their child, then the student will be placed in a program of "high quality language instruction, based on scientifically based research" (Section 3115 (c) (1)), as determined by Heritage Academy.

- Those children placed in a program will be counted for state and Federal funding.
- Once a student tests proficient on the English language proficiency test, they will be exited from the LEP program and monitored for 2 years. Students on monitoring status will be coded LEP on the ISAT and still counted for state and Federal funding purposes.
- Those students whose parents waive the services may not be considered as “LEP” for state and Federal funding purposes and ISAT coding. However, they are still English language learners and must still be served according to their needs, according to the Office of Civil Rights.

Services for Gifted & Talented Students

Heritage Academy will provide instruction and training for children between the ages of five (5) years and eighteen (18) years who are gifted/talented as defined by the State Board of Education. Heritage Academy will adhere to and utilize guidance from the Idaho Department of Education to determine eligibility criteria and to assist the school’s staff in developing a variety of flexible approaches for instruction and training that are aligned to the SEM. These may include administrative accommodations, curriculum modifications and special programs" (Idaho Code 33-2003).

Heritage Academy’s SEM will be an excellent avenue for providing an educational program that will support the needs of gifted and talented students. Heritage Academy will utilize eligibility criteria developed by the Idaho Department of Education as stipulated in Idaho Code 33-2003. Heritage Academy will also utilize the services of the Center on Disabilities and Human Development (CDHD) to ensure that gifted and talented students at the school are properly identified and provided with appropriate instruction. Gifted and Talented Transportation will be provided as needed and required.

At Heritage Academy, our goal is to meet every child at the most appropriate level where growth will take place. Gifted and Talented, LEP, Title I and Section 504 students have special needs, and they will be provided educational experiences that will strive to meet those needs in the regular classroom as well as in special classes, seminars or workshops. Heritage Academy will encourage areas beyond the scope of the regular curriculum to be explored by all children with special needs. The curriculum we have chosen lends itself well to both extensions and remediation. In addition, possibilities to meet the needs of all children may include but are not limited to the following activities: leveling for reading and math, competitions, curriculum acceleration, special topic classes, independent study, interest-based workshops, tutoring and pullout classes.

Tab 4: Measuring Educational Standards, Student Progress, Standardized Testing, Accreditation, NLCB Provision Regarding Plan for Improvement

Measurable Student Educational Standards

Student achievement will be demonstrated in measurable terms to parents, students and the community at large. Heritage Academy will actively participate in state requirements for student achievement, accountability, and accreditation. Our plan includes orderly reports of progress toward our goals as well as continued financial viability. The following details Heritage Academy's Measurable Student Standards plan:

At the beginning of each year, math and reading assessments will be administered to establish a baseline on each student. Curriculum based assessments will be given weekly throughout the year. Baseline data (e.g., test scores, grades, attendance, and behavioral records) will be collected the first year and progress will be monitored school wide on a yearly basis. All assessments will be used to improve instruction and develop appropriate curriculum adjustments including extensions and interventions. Heritage Academy's expectations are that students' rates of achievement and attendance accelerate beyond the levels they were attaining before attending Heritage Academy and meet and/or exceed ISAT proficiency levels as defined by the State.

Student performance will be assessed using a variety of assessments including state –required assessment, curriculum-based assessments, rubrics developed for determination of student progress in technology, behavior/attendance based on teacher evaluation, and self-monitoring of student progress. Below are School Effectiveness Goals for Heritage Academy. Measurement criteria are listed for each goal.

Measuring Student Progress I.C. 33-5205(3)(b)

The goal we will constantly strive for and expect at Heritage Academy is that 100% of our students will exceed the minimum proficiency requirements on all state-mandated testing and other testing that may be instituted or required in the future. However, understanding that the rate at which students may arrive at this point varies, Heritage Academy will expect that within three years of students being consecutively enrolled at the school:

- 80% of 2nd, and 3rd graders will be at “Benchmark” or a combination of “Benchmark” and “Strategic” on the Idaho Reading Indicator (IRI).
- 80% of 3rd, 4th and 6th graders will achieve “Proficient” and/or “Advanced” in each area, as applicable, on the Idaho Standards Achievement Test. Students who do not score proficient or advanced will have an individual remediation plan in place.

Student Assessment I.C. 33-5205(3)(c)

The method by which student progress in meeting the above identified student educational standards is to be measured consist of the Idaho Reading Indicator (IRI), Idaho Standards Achievement Test (ISAT), the Idaho Alternative Assessment (IAA) if applicable, and the National Assessment of Educational Progress (NEAP), if selected. Student assessment data will be reported annually to the Idaho Public Charter School Commission.

Method for Providing Standardized Testing I.C. 33-5205(3)(d)

Heritage Academy students participate in the state assessment system required of all Idaho public school students as defined by the Idaho Board of Education.

Student assessment evaluation, reported annually to the Heritage Academy Board of Trustees, will consist of:

1. Student baseline developed during the first year using testing results;
2. A comparison of annual results with baseline scores to assess progress;
3. Grade-level and school composite scores;
4. A graph of annual results showing year-to-year change;
5. A graph of school scores relative to state and national averages; and
6. Sub-analysis of a variety of variables to identify areas for improvement.

Monitoring progress of our students and evaluating innovations in education procedures are important parts of our curriculum development process.

Assurance of State Accreditation I.C. 33-5203(3)(e) & IDAPA 08.02.140

Heritage Academy will obtain accreditation through the Northwest Association of Accredited Schools (NAAS). Throughout the implementation of the school plan, we will utilize the Self-Assessment Idaho School Accreditation Quality Indicators as a guide. The Self-Assessment consists of six standards:

1. Vision, Mission, and Policies
2. Highly Qualified Personnel
3. Educational Program
4. Learning Environment
5. Continuous School Improvement
6. Student Achievement

Provision Regarding Plan for Improvement Under NCLB

Heritage Academy is a school in which student success is our top priority. If it were determined, based on student performance, that the school was in need of improvement as outlined in the No Child Left Behind Act, the Administrator and the Governing Board develop a comprehensive plan for improving performance. We would examine the current processes and develop a detailed performance improvement plan to address each process deemed important to achieve increased student success. Heritage Academy charter school will comply with all federal and state requirements regarding student achievement and school improvement.

Tab 5: Governance Structure, Parental Involvement, & Audits

Governance Structure

Heritage Academy is a non-profit corporation organized in accordance with *Idaho Code* § 30-3-1 *et seq.* and is governed by a board of directors (the “Board of Directors” or “Board”). The Board consists of three (3) to seven (7) voting members comprised of parent(s) or legal guardian(s) of enrolled students and other individuals who desire to serve on the Board.

Heritage Academy’s Board of Directors shall be responsible for ensuring that the school is in compliance with all applicable federal and state education standards, all applicable federal and state laws, rules, regulations and policies, as well as the terms and conditions of the charter. Heritage Academy acknowledges and understands that upon approval of the petition and charter contract, the Board of Directors will be public agents required by the IPCSC to control operations of the charter school.

Members of the Board of Directors will be elected by the Board of Directors at the Annual Meeting of the directors then in office. The existing directors shall notify the community and stakeholders of any available seats on the board, screen candidates, and then nominate potential directors to the Board for election.

Heritage Academy; Board of Directors

In general, the Board of Directors manages the property, affairs, and business of Heritage Academy. As such the Board is responsible for ensuring Heritage Academy is adequately staffed, and that such staff provides sufficient oversight over Heritage Academy’s operational and educational activities. The Board exercises all of the powers of the school, whether derived from law or its Articles of Incorporation. The Board’s specific duties and responsibilities include the following:

- To establish and promote Heritage Academy’s mission statement and educational philosophy and set and enforce policies to ensure the school operates in a manner consistent with the same, as well as the school’s charter, and all applicable laws;
- To prepare, or cause to be prepared, and approve an annual budget. In fulfilling this responsibility, the Board must ensure the school operates within the approved budget and strategically manage its resources to ensure the short and long term financial success and strength of the school;

- To enforce, at the Board's sole discretion and judgment, all contract issues or other legal rights pertaining to the school and protect the legal interests of the school, and manage the school's liabilities with sound and reasonable business judgment;
- To approve and establish a school calendar, including any changes made during the school year;
- To maintain, or cause to be maintained, any records or documents required by law or provided for by its charter. Additionally, the Board shall be ultimately responsible for the timely filing of all reports required pursuant to local, state, and federal regulations;
- To negotiate and approve any contracts for the lease or purchase of the school's facilities, including any changes or renewals of the facility lease/purchase agreements, and to establish any policies for facility use;
- To convene one regular monthly meeting, or as often as is reasonably necessary, subject to *Idaho Code*. §§23-67-2340 through 2347, and provide an opportunity for public input. Additionally, the Board may convene work sessions as it deems appropriate; and
- To approve or disapprove all hiring and termination recommendations, and approve all staff employment contracts.

Additionally, the Board performs such other duties as are appropriate and necessary to the safe and effective operation of the school, and which promote the school's commitment to educational excellence. The Board also acknowledges and agrees to adhere to Idaho Open Meetings Law. This requires proper notice and posting of regular and special board meetings, work sessions, and other less formal meetings wherein a quorum is present and school business is being discussed.

[Board of Directors & Principal; Relationship](#)

As noted above, the Board of Directors' role is to manage the property, affairs, and business of Heritage Academy. The principal is accountable to the Board of Directors and is responsible for and empowered to oversee the day-to-day operations of the school. The principal's responsibilities include, but are not limited to, the following:

1. Establish and maintain the curriculum and technology integration;
2. Supervise administrative subordinates;
3. To serve as the District/Board liaison;

4. Implement effective student disciplinary procedures and ensure their application is in compliance with relevant laws, policies and procedures.
5. Ensure administrative functions are successfully achieved, effective administrative procedures are developed, policies and school procedures are carried out, and strategic planning is continuous.
6. Interact and intercede for the needs of staff and/or students as needed;
7. Assist the Board in carrying out its duties to keep accurate records, documents, file reports, etc.
8. Report to the Board as required regarding:
 - staff communications
 - meeting coordination
 - parent interactions, and
 - staff information reviews.
9. Attend or conduct meetings of various constituent groups; attend school functions; attend external meetings, conferences, or legal training sessions.
10. Perform other duties as assigned by the Board of Directors.

(Some duties may be shared/delegated to a Vice-Principal)

Heritage Academy Committees & Ancillary Support Personnel

The Board may, from time to time, by resolution, designate such committees of its members as it may deem appropriate in carrying out its duties, responsibilities, functions and powers. The membership of each committee will include at least one (1) Board member. Ancillary support personnel, such as clerical and custodial, will be hired by the Board and supervised by the principal.

Parental Involvement

Enrollment at Heritage Academy will provide unique and meaningful opportunities for parental involvement by actively encouraging parent participation in Heritage Academy's Parent Organization, involvement in school management and volunteer work.

Heritage Academy encourages all of our parents to be highly involved in their child(ren)'s education and in the Heritage Community. Heritage Academy understands that parent involvement may look different for each family and values all efforts parents make to support their child's education. Some examples of parent involvement may include:

- Asking your child what he/she learned in school each day
- Reviewing your child's homework with him/her
- Reading with your child
- Attending quarterly conferences
- Communicating with your child's teacher by phone, email or in person

- Volunteering at the school
- Helping the school with activities

Heritage Academy Parent Organization

Parents/Guardians of Heritage Academy students become members of the Heritage Academy Parent Organization. Every member of the Heritage Academy Parent Organization will:

- Elect a formal Parent Organization executive committee, electing a President, Vice-President, Secretary and Treasurer. The Parent Organization may consist of parents, grandparents, and/or legal guardians.
- Potentially serve on a board appointed task force or committee to investigate and research specific items related to school policy, procedure, programs, and curriculum.
- Executive members of the Parent Organization will be encouraged to attend the governing board meetings.
- Volunteer time to the school.
- Organize volunteer opportunities and potentially produce a monthly newsletter.
- Organize fundraising opportunities.
- Background checks, where applicable, will be performed on volunteers working with students.

Involvement in School Management

Perhaps the most substantive way for parents to be involved in the operation and actual management of school is through service on Heritage Academy's Board of Directors or school Committee. The Board of Directors is charged with managing the property, affairs, and overall operation of the school. In addition, the Board of Directors establishes and enforces school policy to ensure the school operates in a manner consistent with Heritage Academy's mission, its charter, and all applicable laws. Membership on school committees provides another opportunity for parents to have meaningful influence on the operation of the school.

Volunteer Time

Heritage Academy will rely on parents and their willingness to volunteer their time to assist with the daily operation of the school as well as after school programs. Parent volunteerism is strictly optional, but it is encouraged for the benefit of the students. Heritage Academy suggests that parents donate a minimum of thirty five hours of volunteer time per year. The school will regularly distribute volunteer information to parents that will allow them to sign up for service in areas of expertise or interest. This will allow parents to provide the most meaningful service, and simultaneously provide the school with the ability to coordinate

parent service with school needs. Additionally, the school will advertise specific assistance in its newsletter and website when needed.

Heritage Academy will also appoint a committee member to schedule and coordinate volunteer services for parents who wish to donate their time to the school. This individual will be charged with maintaining parent volunteer information and notifying parents of opportunities at the school. Examples of parent volunteer opportunities include but are not limited to:

- | | |
|----------------------------------|----------------------------|
| Recess assistance | Playground monitoring |
| School tours | Computer lab assistant |
| Computer support | Field trips |
| At-home repair of student wear | Fundraising |
| Daily cleanup | Traffic/Parking assistance |
| Classroom aid/support | Building maintenance |
| At-home work for teachers | Set construction & design |
| Baking dishes for special events | Library assistance |
| Assembly Support | Parent Organization |

The foregoing list is non-exhaustive and may change from time to time on an “as-needed” basis.

Financial and Programmatic Audits

During each year of operation, Heritage Academy will conduct: (i) an annual programmatic operations audit; and (ii) an annual financial audit. The results of the annual financial audit will be submitted to the Idaho Department of Education to comply with Idaho Code 33-701(6) (as required by Idaho Code 33-5210(3)).

Heritage Academy will comply with IPCSC policy and conduct a programmatic operations audit which will be submitted to the IPCSC each year.

Accreditation-related visits and/or reports will be completed in a timely manner and copies will be submitted to Heritage Academy’s authorizing entity if and when applicable.

The annual financial audit will be conducted by an independent auditing firm and copies of the audit will be sent annually to the chartering entity. In addition, the IPCSC may choose to conduct an audit of Heritage Academy at the commission’s expense. An independent audit may be performed as specified above (i.e. annually) or at such time as revocation of the charter may be initiated.

Tab 6: Charter School Employees

Employee Qualifications

The Heritage Academy Board of Directors believes that the staff members at the school are critical to student success and as a result, Heritage Academy will seek to hire the most qualified and experienced staff members available. Heritage Academy's instructional staff will meet or exceed certification, licensure and/or training qualifications required by state law. The Heritage Academy Board of Directors will hire teachers who meet specific state and federal guidelines and are considered Highly Qualified. In addition, when applicable, Heritage Academy staff members will hold the appropriate state licensure or certification to provide services to students at the school. All Heritage Academy employees will follow the applicable professional code of ethics for their respective positions. The principal will make hiring recommendations to the Board of Directors for approval of instructional staff. Heritage Academy reserves the right to seek waivers or limited certification options as provided by rule of the Idaho State Board of Education when deemed in the best interests of the educational program. Additionally, Heritage Academy reserves the right to hire any person for temporary assistance under the direct supervision of certified staff members. These provisions are intended to allow various community experts and other specialized persons who may not hold certification to contribute to the school according to their talents, experience, creativity, or expertise on a short-term or seminar basis. New employees will undergo background checks and finger printing.

Health & Safety Procedures

To ensure the health and safety of Heritage Academy students and staff, the school will comply with the following health and safety procedures:

1. Conduct criminal history checks for all employees in compliance with Idaho Code § 33-130. This requirement is a condition of employment.
2. Require that all students show proofs of immunization or parent waiver before being enrolled at the school.
3. Require that all visitors sign in at the office and receive and wear a visitor's pass when visiting the school building.
4. Provide for inspection of the facility in compliance with § 39-4130 of the Idaho Code.
5. Adopt policies to meet all required city, state, and federal health, accessibility, safety, fire, and building codes for public schools. Fire

and safety officials using the same guidelines for all public schools will inspect the facility.

6. Develop an emergency operations / crisis response plan and provide annual training to staff members.
7. Adopt and implement a comprehensive set of health, safety and risk management policies. These policies will be developed in consultation with Heritage Academy's insurance carriers and at a minimum address the above and the following items:
 - a. Policies and procedures for response to natural disasters and emergencies, including fires and bomb threats.
 - b. Policies relating to preventing contact with blood-borne pathogens.
 - c. A policy requiring that all staff receives training in emergency response, including appropriate "first responder" training.
 - d. Policies relating to the administration of prescription drugs and other medicine.
 - e. A policy that the school will be housed in a facility that has received fire marshal approval and has been evaluated by a qualified structural engineer who has determined the facilities present no substantial safety hazard.
 - f. Policies establishing that the school functions as a gun-free, drug, alcohol and tobacco free workplace.

In an effort to promote a safe learning environment and respect for the personal, civil, and property rights of all members of the school community, behavior or actions including but not limited to those identified in board policy and in the student handbook may provide grounds for suspension or expulsion in accordance with Heritage Academy's disciplinary policies.

Employee Benefits

All Heritage Academy employees will participate in the following programs and receive the following benefits: group health insurance, sick leave benefits, Public Employee Retirement System participation, Federal Social Security, Unemployment Insurance, and Worker's Compensation insurance to the extent allowed and required by law.

Employee Transfer Rights

Employees of Heritage Academy are not employees of the Jerome School District; however, they may apply to teach in any school district. Further, teachers at Heritage Academy will not be eligible for an in-district transfer to another school within the Jerome School District.

Collective Bargaining Provision

Heritage Academy's staff and employees will be a separate unit for purposes of collective bargaining.

Teacher/Administrator Terms & Conditions of Employment

All teachers and administrators at Heritage Academy will be employed pursuant to the terms of a written contract approved by the State Superintendent and shall possess the personal characteristics, knowledge, and experience consistent with the philosophy, mission, and expectations of Heritage Academy as outlined in this petition.

Employee Background Checks

Heritage Academy ensures that all Heritage Academy employees will submit to a State of Idaho criminal history check as established in § 33-130, *Idaho Code*, and FBI fingerprinting check. Heritage Academy will submit one criminal history check finger print card to the Office of Certification at the State Department of Education (the "SDE") and one will be maintained in the employee's personnel file.

Tab 7: Admission & Disciplinary Procedures

Projected Enrollment Capacity

Based on the capacity of its facility and program, Heritage Academy is petitioning for an enrollment capacity of 150 students in grades K-6 in its first year of operation. Each grade level will serve one class of 25 students.

Admission Procedures

In accordance with *Idaho Code* § 33-5205(3)(i), Heritage Academy has adopted the following admission procedures to ensure a fair and equitable selection process for admission to Heritage Academy and enrollment at Heritage Academy in subsequent school years.

Requests for Admission

A parent, guardian, or other person with legal authority to make decisions regarding school attendance on behalf of a student, may make a request for such child to attend Heritage Academy. In the case of a family with more than one child seeking to attend Heritage Academy, a single written request for admission must be submitted on behalf of all siblings. Requests may be made either electronically via the school's website, or in writing to the school. The request for admission must be submitted to, and received by, the school's designated office on or before the enrollment deadline established each year. The request for admission shall contain the name, grade level, address, and telephone number of each prospective student in a family. Only those requests for admission submitted on behalf of prospective students that are received prior to the enrollment deadline established by the Heritage Academy shall be permitted in the admissions process. Only requests that contain all required information for admission shall be considered by the School. Requests for admission received after the established enrollment deadline will be added to the bottom of the waiting list for the appropriate grade. If there is an opening in one grade, a sibling, if any, from a late submitted application must go to the bottom of the sibling list.

Admission Preferences

Heritage Academy has established an admission preference for students residing in the attendance area of the public charter school, as required by Section 33-5206, *Idaho Code*. For the purposes of this petition, the "attendance area" shall refer to the Primary Attendance Area referenced in Tab 2 *Target Student Population*. In addition, the school has established admission preferences, as authorized by Section 33-5205, *Idaho Code*, for students returning to the public charter school, for children of founders and full time employees, and for siblings of students already enrolled in the school.

Priority of Preferences (Initial Year)

The selection hierarchy with respect to admission preferences for over-enrollment shall be as follows:

First, to children of founders and full time employees of Heritage Academy, provided that this admission preference shall be limited to not more than ten percent (10%) of the capacity of Heritage Academy.

Second, to siblings of pupils already enrolled in Heritage Academy.

Third, to prospective students residing in the Primary Attendance Area of Heritage Academy.

Fourth, to prospective students residing outside of the Heritage Academy Primary Attendance Area.

Priority of Preferences (Subsequent Years)

The selection hierarchy with respect to admission preferences for over-enrollment shall be as follows:

First, to pupils returning to Heritage Academy in the second or any subsequent year of operation. Returning students are automatically enrolled in the appropriate grade and do not need to be selected by a random selection method.

Second, to children of founders and full time employees of Heritage Academy, provided that this admission preference shall be limited to not more than ten percent (10%) of the capacity of Heritage Academy.

Third, to siblings of pupils already enrolled in Heritage Academy.

Fourth, to prospective students residing in the Primary Attendance Area of Heritage Academy.

Fifth, to prospective students residing outside of the Heritage Academy Primary Attendance Area.

Equitable Selection Process & Over Enrollment

If the number of requests for admission to Heritage Academy exceeds its capacity in its initial year or in any subsequent school years, the school shall select students by lottery through using the process described herein to ensure a fair and equitable selection process.

Public Notification of Enrollment Opportunities

In accordance with *Idaho Code* § 33-5205(3)(s), Heritage Academy has adopted the following process by which citizens of the area of attendance will be made aware of enrollment opportunities at the school:

Heritage Academy will disseminate enrollment information, taking into consideration the language demographics of the attendance area, at least three months in advance of the enrollment deadline established by Heritage Academy each year. Such information will be posted in highly visible and prominent locations within the area of attendance. The notice process will also include dissemination of enrollment opportunity information through press releases or public service announcements through media outlets that broadcast or disseminate printed publications within the area of attendance. These announcements will be broadcast or published by these media outlets on at least three occasions, beginning not later than 14 days prior to the enrollment deadline each year. The enrollment information will advise that all prospective students will be given the opportunity to enroll in Heritage Academy regardless of race, color, national or ethnic origin, religion, gender, social or economic status, or special needs.

Enrollment Deadline

Each year, Heritage Academy will establish an enrollment admissions deadline, which shall be the date by which all requests for admission to attend the school for the next year must be received. The enrollment deadline will not be changed once the enrollment information is disseminated as required by state law.

Equitable Selection, Over Enrollment & Waiting Lists

If the initial capacity of a the school is insufficient to enroll all prospective students, or if capacity is insufficient to enroll all prospective students in subsequent school years, then the board of directors shall determine which students will be offered admission to the school by conducting a fair and equitable selection process. The selection procedure shall be conducted as follows:

1. The name of each prospective student on the proposed attendance list shall be individually affixed to or written on a three by five inch index card. The index cards shall be separated by grade. The selection procedure shall be conducted one grade level at a time, with the order for each grade level selected randomly. The index cards containing the names of the prospective students for the grade level being selected shall be placed into a single container.
2. A neutral, third party will draw the grade level to be completed first and then draw each index card from the container for that grade level, and this person will write the selection number on each index card as drawn, beginning with the numeral "1" and continuing in sequence thereafter. In addition, after selecting each index card, the name of the person selected will be compared to the proposed attendance list to determine whether any preferences are applicable.

3. If the name of the person selected is a returning student (for enrollment in subsequent years), then the letter "A" will be written on the index card. If the name of the person selected is the child of a founder or full time employee, the letter "B" will be written on such index card. If the name of the person selected is the sibling of another student that has already been selected for admission to the public charter school, then the letter "C" will be written on the index card. If the name of the person selected resides in the attendance area of the public charter school, then the letter "D" will be written on the index card. (Note: in the school's first year of operation, only letters "B" through "E" will be used.)
4. With regard to the sibling preference, if the name of the person selected has a sibling in another grade who has already been selected, but the person previously selected did not have the letter "C" written on his or her index card (because a sibling had not been selected for admission prior to the selection of the index card of that person), the letter "C" will be written on that person's index card at this time.
5. With regard to the preference provided to children of founders and full time employees, a running tally shall be kept during the course of the selection procedure of the number of index cards, in the aggregate, that have been marked with the letter "B." When the number of index cards marked with the letter "B" equals ten percent of the proposed capacity of the public charter school for the school year at issue, then no additional index cards shall be marked with the letter "B," even if such person selected would otherwise be eligible for the founder/full time employee preference.
6. After all index cards have been selected for each grade, then the index cards will be sorted for each grade level in accordance with the following procedure. All index cards with the letter "A" shall be sorted first, based on the chronological order of the selection number written on each index card; followed by all index cards with the letter "B," based on the chronological order of the selection number written on each index card; this process shall continue through to the letter "E," which will be followed by all index cards containing no letters, based on the chronological order of the selection number written on each index card.
7. After the index cards have been drawn and sorted for all grade levels, the names will be transferred by grade level, and in such order as preferences apply, to the final selection list.
8. The names of the persons in highest order on the final selection list shall have the highest priority for admission to the public charter school in that

grade, and shall be offered admission to the public charter school in such grade until all seats for that grade are filled.

9. Once on a waiting list, students will remain eligible for placement within the school throughout the entire school year for which they applied. There shall be no carryover from year to year of the waiting list maintained to fill vacancies at the school. A new lottery shall be conducted each year to fill vacancies which become available. Students wishing to be removed from the waiting list must make their request in writing to the school.
10. Once the enrollment period is complete and waiting lists have been established through lottery as described above, subsequent applications will be added to the waiting lists on a first come-first served basis.

Disciplinary Procedures: Suspension, Expulsion, & Re-enrollment

Heritage Academy recognizes that effective instruction requires an orderly environment focused on learning and that schools have an important role to fill in supporting parent efforts to teach basic values to their children. The school will establish a code of conduct and other rules clearly defining expectations, as well as appropriate and inappropriate behaviors. The Board will create a student handbook that includes the code of conduct and identifies student behavior expectations. The handbook will include official notification of disciplinary rules. Students will be expected to read the handbook and agree to the code of conduct at the beginning of each school year (A draft Student Handbook is attached in Appendix F.)

Suspensions and expulsions will comply with Section 33-512, *Idaho Code*. The Administrator or his/her designee may suspend a student for violation of school policy. The Administrator or any staff member may recommend a student for disciplinary action. Suspension or Expulsion will be considered only as the final option in a series of efforts to avoid such measures including but not limited to the following steps:

Step 1: Parent/ Guardian incident notification procedure (written and/or verbal)

Step 2: Principal intervention.

Step 3: Suspension with parental notification – 3 days. Re-admission will be allowed after a conference with student, parents/guardian, and principal.

Step 4: Suspension with parental notification 5 days. Re-admission will be allowed after a hearing within (5) school days with the Board of Directors.

Step 5: Expulsion until the next calendar break/semester or for the rest of the year. A hearing will be set within five (5) school days with the Board of

Directors. The Board of Directors shall have the right to permanently expel students for disciplinary or attendance reasons.

Heritage Academy's Board of Directors must approve any expulsion. The Board shall establish disciplinary procedures and may add or amend any disciplinary procedure consistent with Idaho Law. Students, parents or staff members may appeal the decision of the Administrator to the Board. For students wanting to reenroll, the parent or legal guardian may reapply and enter the lottery process again only if the student was not expelled for violation of the code of conduct or other serious disciplinary problems. All other students wanting to reenroll are free to do so by reapplying through the lottery.

Discipline for students with disabilities shall comply with Idaho Code 33-205 and IDEA. The *Idaho Special Education Manual* encourages schools to address student misconduct through appropriate school wide discipline policies, instructional services, and/or related services. Therefore, if a student has behavior problems that interfere with his or her learning or the learning of others, an individualized education program (IEP) team shall consider the use of strategies, including positive behavioral supports and interventions, to address the behavior. If the IEP team determines that such services are needed, they be included in the IEP and be implemented. Students with disabilities who are subject to disciplinary actions by a district are entitled to all of the due process rights afforded students without disabilities under Idaho Code 33-205.

In addition to these rights, the Individuals with Disabilities Education Improvement Act of 2004 (IDEA 2004) provides special education rights and additional discipline procedures to a student with a disability whom the Academy is removing from his or her current educational placement. These procedures come into play when Heritage is unable to work out an appropriate placement for the student. Further, these procedures do not prevent the Administrator from maintaining a safe environment conducive to learning that is critical for all students. Even though Idaho Code allows the Administrator to "temporarily suspend" students for up to 20 school days, all students with disabilities who have been suspended or expelled for more than 10 cumulative academy days in an academy year retain the right to a free appropriate public education. (FAPE).

General Discipline Guidelines for students with disabilities

The general requirements pertaining to the discipline procedures of special education students are as follows:

1. The Administrator may remove a student from his or her current placement to an appropriate interim alternative education setting (IAES) or another setting for not more than 10 consecutive days to the extent those alternatives are applied to students without disabilities.
2. The Administrator may suspend any student, including a special education student, for up to 10 cumulative school days in a school year if he or she

- violates the code of student conduct, and services may cease during this period. In accordance with Idaho Code:
- a. The Administrator has the authority to order a disciplinary suspension for up to 5 school days.
 - b. The BOD can extend the disciplinary suspension for up to 5 additional school days.
3. A series of suspensions exceeding 10 days in a school year shall not constitute a pattern of removals resulting in a change of placement, without following the procedures discussed in the most current *Idaho Special Education Manual*.
 4. Students who have not been determined eligible for special education may be entitled to an evaluation and other IDEA rights—including the right to FAPE during periods of disciplinary suspension that extend beyond 10 cumulative school days in a school year if:
 - a. Heritage Academy had knowledge that the student met the IDEA eligibility prior to the behavior that precipitated the disciplinary suspension; and
 - b. The parent and/or adult student asserts the right to FAPE.

Procedures for Abuse of Alcohol or Controlled Substances

Pursuant to federal regulations set forth by the Drug Free Workplace Act of 1988, Heritage Academy is committed to the concept of having a drug free student environment. It is our intent that programs and activities be planned and carried out by the professional staff that will enable the school to achieve this goal.

The primary focus of our program will be educational in nature with instruction geared to discourage student experimentation with any illegal controlled substances or mood altering substances. A companion focus of this program shall be aimed to assist students who have made unacceptable choices regarding any controlled substance; a necessary part of this focus is an attitude among teachers and other staff members that one of our responsibilities is to assist those students who need help in overcoming their potentially addictive behaviors. We believe that it is possible to have a drug free environment in a school setting. If a student cannot, or will not, commit to responsible behavior to help achieve this goal, several sanctions may be imposed as a disciplinary measure. These include, but are not limited to, the following:

1. Parent/guardian notification
2. Referral to support, such as counselors and/or health professionals
3. Referral to an outside agency for chemical dependency assessment and/or treatment
4. Suspension or Expulsion

Referral Policy. When there is reasonable cause to believe a student illegally uses, sells, distributes, or possesses drug paraphernalia, drugs, alcohol, or other mood-altering substances in school, on or adjacent to school property, or at school functions, the student will be subject to discipline pursuant to this policy.

Charter School Attendance Alternative

Because Heritage Academy is a new charter school and not a conversion of an existing school, the attendance alternative would be the same as for those presently residing within the Area of Attendance as defined in Tab 2 *Target Student Population* above. Students located within the attendance area of the Charter School would have the option to enroll in existing public schools presently serving the area. No student will be required to attend Heritage Academy.

Habitual Truancy, Incurability & Disruptive Students

Students of Heritage Academy may be denied attendance for any of the following reasons:

- If the student is an habitual truant, defined by Idaho Code 33-206 as any public school pupil who, in the judgment of the board of trustees, repeatedly has violated the attendance regulations established by the board; or any child whose parents or guardians, or any of them, have failed or refused to cause such child to be instructed as provided in section Idaho Code.
- If the student is incorrigible,
- If the student is deemed by the board of trustees to be disruptive of school discipline or instruction effectiveness, or
- If the student is detrimental to the health and safety of the other students

In addition, students attempting to enroll in Heritage Academy after being expelled from another district may be denied enrollment. Students who are expelled from Heritage Academy or denied enrollment will be denied enrollment for not less than one calendar year. Heritage Academy will comply with Idaho Code 33-205 which states that “No pupil shall be expelled nor denied enrollment without the board of trustees having first given written notice to the parent or guardian of the pupil, which notice shall state the grounds for the proposed expulsion or denial of enrollment and the time and place where such parent or guardian may appear to contest the action of the board to deny school attendance, and which notice shall also state the rights of the pupil to be represented by counsel, to produce witnesses and submit evidence on his own behalf, and to cross-examine any adult witnesses who may appear against him. Within a reasonable period of time following such notification, the board of

trustees shall grant the pupil and his parents or guardian a full and fair hearing on the proposed expulsion or denial of enrollment. However, the board shall allow a reasonable period of time between such notification and the holding of such hearing to allow the pupil and his parents or guardian to prepare their response to the charge. Any pupil who is within the age of compulsory attendance, who is expelled or denied enrollment as herein provided, shall come under the purview of the juvenile corrections act, and an authorized representative of the board shall, within five (5) days, give written notice of the pupil's expulsion to the prosecuting attorney of the county of the pupil's residence.

Discipline for students with disabilities, including expulsion and denial of attendance will comply with the requirements of the Individuals with Disabilities Education Act and the Idaho Special Education Manual as adopted by the Heritage Academy Board of Directors and described in the Heritage Academy charter petition.

Student Handbook & Accessibility

Heritage Academy will assemble a student handbook pursuant to state law which outlines a Code of Conduct including expectations and consequences for unacceptable behavior (suspension/expulsion). To ensure parents/guardians have access to the Student Handbook and Code of Conduct, it will be included as part of each students registration packet. (A draft Student Handbook is attached in Appendix F.)_Before any registration packed will be deemed "complete," parents/guardians will be asked to thoroughly review all school policies, contents, and permissions and then sign an acknowledgement form asserting that they have read and understand the policies and procedures governing conduct at Heritage Academy.

Tab 8: Business Plan, Transportation, & School Lunch Program

Business Plan

Business Description

Heritage Academy, Inc. was incorporated in August of 2009 and organized exclusively for educational purposes within the meaning of Internal Revenue Code § 501(c)(3). Notwithstanding any other provision of its articles of incorporation, Heritage Academy will not carry on any other activities not permitted to be carried on: (i) by a corporation exempt from Federal Income Tax under § 501(c)(3) (or corresponding provision of any future U.S. Internal Revenue Law), or (ii) by a corporation, contributions to which are deductible under Internal Revenue Code § 170(c)(2).

Marketing Plan

Heritage Academy will actively recruit students for enrollment using, but not limited to, the following methods:

- School website (to be constructed subsequent to approval) that will introduce the school's mission, vision, philosophy, method of instruction, and other information about the school.
- Brochures promoting the curriculum and methods used at Heritage Academy.
- Public informational meetings about Heritage Academy will be held in accordance with Idaho Statute §67-23.
- Enrollment information will be printed in English and additional languages as necessary to reflect the demographics of the area, at least three months ahead of enrollment deadline.
- Enrollment information will be posted in highly visible and prominent locations in English and Spanish within the attendance area of Heritage Academy.
- Heritage Academy will ensure press releases are in English and Spanish and will be disseminated to media outlets and/or printed publications serving the attendance area. These announcements will start at least 14 days before the enrollment deadline each year and will run on at least three occasions.

Instructional Arrangements

Heritage Academy plans to open in August of 2011 with a grade organization consisting of a traditional K-6 grade school. Heritage Academy's Board and its principal will determine the school calendar, schedule, and hours of operation.

Within that general format, the principal, in consultation with the Board, will establish the school year calendar in compliance with the requirement of providing 900 hours of instruction.

Administrative services will be provided by the principal and supplemented by other contracted services as needed. Annual programmatic and financial reports will be presented to the Board. The principal will also serve as the liaison between the board, and parents unless otherwise directed by the board. Financial operations will be contracted out to licensed and bonded entities. Funding sources will include state allocation per pupil, federal start-up grants, private grants, business partnerships, and donations.

Day-to-Day Operations

The principal will determine the day-to-day operations of the school. The Board of Directors will have oversight authority.

Budget

Heritage Academy's budget: 1) will be prepared in compliance with section 33-801, Idaho Statutes and policy of the State Board of Education, 2) will be presented at a public hearing in June of the year the school will open, and 3) will be delivered to the SDE as required on or before July 15 prior to the start of the school year. The budget will be prepared, approved and filed using the form prescribed by the state superintendent of public instruction.

Expenditures

Expenditures will be handled as described in the following sections.

Purchasing Process: Until alternative arraignments are made, the principal will determine procedures for procuring goods and services, with approval of the Board.

Please Note: the following documents are included in the appendices as follows:

Appendix D: Projected Budgets, Cash Flow, & Budget Assumptions

Appendix E: Board Member Resumes

Transportation Services Proposal

In accordance with Idaho Code Section 33-1501 and 33-1006, where practicable the school will provide transportation to students that reside more than 1 ½ miles from the school and within the Primary Area of Attendance. Heritage Academy will ensure its transportation policy complies with Idaho Code 33-402(g), 33-1510, 33-1006, 33-1501 through 1514, 33-5208, and 67-2806 inasmuch as they are applicable to Academy. Inasmuch as the process for advertising, receiving proposals, and selecting a student transportation provider is time consuming and involves various timelines and procedures, Heritage Academy has already contacted North Side Bus Co. to inform them of our intent to operate a new charter school. In the process of advertising, we will solicit proposals from all busing contractors listed on the SDE's contractor list. Attached as Appendix G is a copy of the letter we received from North Side Bus Co.

School Lunch Program Plan

At Heritage Academy, we will strive to provide our students with healthy meals. However, we do not plan to offer a lunch program in our first year of operation, and we are currently exploring different lunch options and we realize that facility limitations and/or equipment constraints may preclude us from providing a "hot" lunch program. Nonetheless, we anticipate that we will contract for our food services at a future date when it is determined by the board that the facility is sufficient and it is financially reasonable to do so. While the contractor has not been identified at this point, we will begin this process as soon as possible after approval. Information regarding eligibility for free and reduced lunch will be collected as part of the initial registration packet and will be stored separately from the students' cumulative files.

Tab 9: Not Applicable

Tab 10: Arrangements, Additional Information Requests, & Plan for Termination

Business Arrangements & Partnerships

Heritage Academy has not entered into any formal business arrangements, partnerships, or lease agreements at this time. However, Heritage Academy will provide complete documentation for the lease or purchase of its facilities prior to the opening of the school.

Additional Information Desired by Petitioners

Not applicable.

Plan for Termination

In the event of revocation, or termination of Heritage Academy's charter, the President of the Board of Directors is responsible for the dissolution of the business and affairs of the school. Heritage Academy will fully cooperate with the IPCSC-through the dissolution process. All records of students will be immediately transferred to the receiving district and a notice will be sent to all parents describing how to request records from Heritage Academy. Personnel records will be maintained by the board secretary and all employees will receive a notice describing where records will be maintained and describing the length of time personnel records will be held. All assets of Heritage Academy remaining after full satisfaction of all debts will be returned to the authorized charting entity for distribution in accordance with state law as required by Section 33-5206(8), *Idaho Code*.

Appendix A: Qualified Electors

STATE OF IDAHO)
) ss.
County of Jerome)

I, Michelle Emerson, Clerk of the District Court of the Fifth Judicial District of the State of Idaho in and for the County of Jerome, do hereby attest that I have examined sheets 5 of the petition attached hereto, with the signatures of said electors as they appear upon the registration oaths, books and records of my office. From such information as I have been able to obtain, I believe that the following signatures are genuine:

Sheet 1: 7 People are registered
Sheet 2: 6 People are registered
Sheet 3: 4 People are registered
Sheet 4: 5 People registered
Sheet 5: 8 People are registered

As to the remainder of the signatures thereon, I believe they are not genuine, except that the following names"

Sheet 1: 3 People are NOT registered
Sheet 2: 4 People are NOT registered
Sheet 3: 1 Person NOT registered
Sheet 4: 1 Person wrong address
Sheet 5: 2 NOT registered 1 Person wrong address

Do not appear on the registration oaths, books and records in my office.

Michelle Emerson

CLERK OF THE DISTRICT COURT

By: [Signature]
Deputy

Petition to Support the approval of Heritage Academy
A new public charter school

Petition Summary & Background	This petition is to support the opening of a new K-8 public charter school in Jerome, Idaho.
Petition Action	We, the undersigned, are interested citizens who support the introduction of a new public charter school in Jerome, Idaho, and we urge our leaders to approve Heritage Academy's charter school petition.

Print Name	Signature	Address	Date	
Kelly Bangert	<i>[Signature]</i>	908 1/2 Ave. F Jerome.	9/29/08	OK
Mary Lou Bangert	<i>[Signature]</i>	908 E Ave. F Jerome	9/29/08	OK
Collin Sharp	<i>[Signature]</i>	163 Homestead Loop Jerome	9/30/08	OK
Martin Eldred	<i>[Signature]</i>	1409 Summer St. Jerome	9/30/08	NR
PATTY WARD	<i>[Signature]</i>	1324 North Fillmore	10-1-08	NR
Cheryl Lamm	<i>[Signature]</i>	1031 South Cedar	10-01-08	NR
Dean Larsen	<i>[Signature]</i>	409 East Ave. F Jerome, Id.	10-1-08	OK
Dan Hall	<i>[Signature]</i>	230 Mountain View Rd E, Jerome, Id	10-1-08	OK
DANIEL KENNEDY	<i>[Signature]</i>	350 E 2005, Jerome, Id	10-1-08	OK
DUANE RUBINK	<i>[Signature]</i>	833 E AVENUE JEROME ID	10/01/08	OK

2

Petition to Support the approval of Heritage Academy
A new public charter school

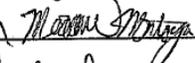
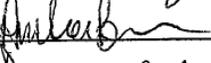
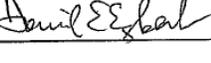
Petition Summary & Background	This petition is to support the opening of a new K-8 public charter school in Jerome, Idaho.
Petition Action	We, the undersigned, are interested citizens who support the introduction of a new public charter school in Jerome, Idaho, and we urge our leaders to approve Heritage Academy's charter school petition.

Print Name	Signature	Address	Date	
RAY RONQUILLO		83338 309 TETON DR. JEROME, ID.	9/30/08	NR
Mike Reynolds		121 E. 50 N. Jerome ID	9/30/08	NR
Michael Bingham		111 E. 50 N. Jerome, ID	9/30/08	OK
CLARK WYATT		2053 Rivercrest Dr. Apt. #204 Twin Falls, ID	9/30/08	NR
Jennifer Stoker		328 W 100 N. Jerome, ID	9/30/08	OK
Ginger Johnston		1516 N Elm Jerome, ID	9/30/08	NR
Amy Couch		1410 N. Date St. Jerome, ID	9/30/08	OK
Lucinda Higley		750 16 th Ave E Jerome ID	9/30/08	OK
Alayna Bleazard		809 18 Ave E Jerome ID	9/30/08	OK
Kevin Bleazard		809 18 Ave E Jerome ID	9/30/08	OK

3

Petition to Support the approval of Heritage Academy
A new public charter school

Petition Summary & Background	This petition is to support the opening of a new K-8 public charter school in Jerome, Idaho.
Petition Action	We, the undersigned, are interested citizens who support the introduction of a new public charter school in Jerome, Idaho, and we urge our leaders to approve Heritage Academy's charter school petition.

Print Name	Signature	Address	Date
Tegan Sheffield		1580 N Cedar St Jerome	Oct 1 2008 OK
Jen Willes		1520 N Elm Jerome	Oct 1, 2008 OK
Miriam Berumen		4505 N Gate St Jerome	10/1/08 NR
Amber Bench		204 E Ave D Jerome	10-1-08 OK
David Egbert		923 4th Ave DE Jerome	10-2-08 OK

4

Petition to Support the approval of Heritage Academy
A new public charter school

Petition Summary & Background	This petition is to support the opening of a new K-8 public charter school in Jerome, Idaho.
Petition Action	We, the undersigned, are interested citizens who support the introduction of a new public charter school in Jerome, Idaho, and we urge our leaders to approve Heritage Academy's charter school petition.

Print Name	Signature	Address	Date
Dawn Soto	<i>Dawn Soto</i>	1353 Autumn Way	9/8-0791
Martin Soto	<i>Martin Soto</i>	1353 Autumn Way	9/8-0791
Scarrow Don Sr.	<i>Don Scarrow</i>	331 North Road	539-1331
Andra Clegg	<i>Andra Clegg</i>	380 East 500 North	324-4505
A. Blair Crouch	<i>A. Blair Crouch</i>	362 East 500 No. JEROME	10/1/08

OK
OK
OK
WRONG ADDRESS
OK

5

Petition to Support the approval of Heritage Academy
A new public charter school

Petition Summary & Background	This petition is to support the opening of a new K-8 public charter school in Jerome, Idaho.
Petition Action	We, the undersigned, are interested citizens who support the introduction of a new public charter school in Jerome, Idaho, and we urge our leaders to approve Heritage Academy's charter school petition.

Print Name	Signature	Address	Date	
Ann Egbert	<i>Ann Egbert</i>	923-4 th Ave. Dr.	9-25-08	OK
Jeanette Watson	<i>Jeanette Watson</i>	301 4 th Ave East	9/25/08	OK
Stephante Allred	<i>Stephante Allred</i>	879 1 st Ave EAST	9/25/08	OK
Shelley R Nash	<i>Shelley R Nash</i>	831 1st Ave E	9/25/08	WRONG ADDRESS
Marilyn Hart	<i>Marilyn Hart</i>	905 1st Ave. E. Jerome	9/25/08	NR
Terri Mortenson	<i>Terri Mortenson</i>	1450 Olympia	9/25/08	NR
Jessica Burk	<i>Jessica Burk</i>	321 Glacier Dr.	9/25/08	OK
Nichole Licano	<i>Nichole Licano</i>	110 N. 800 E. Jerome	9-30-08	OK
Linda Marie	<i>Linda Marie</i>	719 E. 2 nd # A - Jerome	9/30/08	OK
Anneli Crouch	<i>Anneli Crouch</i>	362 E. 500 N. - Jerome	10/1/08	OK

STATE OF IDAHO)
) ss.
County of Jerome)

I, Michelle Emerson, Clerk of the District Court of the Fifth Judicial District of the State of Idaho in and for the County of Jerome, do hereby attest that I have examined sheets 1 of the petition attached hereto, with the signatures of said electors as they appear upon the registration oaths, books and records of my office. From such information as I have been able to obtain, I believe that the following signatures are genuine:

Sheet 1: 4 are REGISTERED
Sheet 2: _____
Sheet 3: _____
Sheet 4: _____
Sheet 5: _____

As to the remainder of the signatures thereon, I believe they are not genuine, except that the following names"

Sheet 1: 3 ARE NOT REGISTERED
Sheet 2: _____
Sheet 3: _____
Sheet 4: _____
Sheet 5: _____

Do not appear on the registration oaths, books and records in my office.

Michelle Emerson

CLERK OF THE DISTRICT COURT

By: *[Signature]*
Deputy

Petition to Support the approval of Heritage Academy
A new public charter school

Petition Summary & Background	This petition is to support the opening of a new K-8 public charter school in Jerome, Idaho.
Petition Action	We, the undersigned, are interested citizens who support the introduction of a new public charter school in Jerome, Idaho, and we urge our leaders to approve Heritage Academy's charter school petition.

Print Name	Signature	Address	Date
Kelly Averbeck	<i>Kelly Averbeck</i>	133 North Road Jerome, ID	9/15/09
William M. Lloyd	<i>William M. Lloyd</i>	216 105 East Main St. Jerome ID	9/16/09
April Jarvis	<i>April Jarvis</i>	736 18 th Ave E Jerome ID	9/16/09
Ryan Jarvis	<i>Ryan Jarvis</i>	736 18 th Ave E, Jerome, ID	9/16/09
Jennifer Yost	<i>Jennifer Yost</i>	671 North Rd. Jerome ID	9/16/09
LINDSEY McWIGGAN	<i>Lindsay McWiggan</i>	838 1st Ave E. Jerome	9/16/09
ANGI FARNSWORTH	<i>Angi Farnsworth</i>	164 W. 300 S. Jerome	9/16/09

Appendix B: Certificates of Charter School Workshop Attendance





Appendix C: Articles of Incorporation & Bylaws

Aug 21 09 03:12p Blair Crouch

208-324-6633

p.14

FILED EFFECTIVE

09 AUG 21 PM 4: 10

SECRETARY OF STATE
STATE OF IDAHO

**ARTICLES OF INCORPORATION
OF
HERITAGE ACADEMY, INC.**

We, the undersigned natural persons all being of the age of eighteen years or more, acting as incorporators under the provisions of Title 30, Chapter 3, Idaho Code, adopt the following Articles of Incorporation for Heritage Academy, Inc.

**Article I
NAME**

The name of the corporation is Heritage Academy, Inc.

**Article II
DURATION**

The period of duration of the corporation is perpetual.

**Article III
PURPOSE**

(a) The corporation is created to act and operate exclusively as a nonprofit corporation pursuant to the Idaho Nonprofit Corporation Act as amended and supplemented. The purpose for which the corporation is created is to establish and operate a school for grades K through 8 and educational activities related thereto.

(b) The general purpose for which the corporation is formed is to operate exclusively for such educational purposes and any and all other lawful purposes, activities and pursuits which are substantially similar to and reasonably related to the foregoing as will qualify it as an exempt organization under Section 501(c)(3) of the Internal Revenue Code.

(c) The corporation may solicit and receive contributions, purchase, own and sell real and personal property, make contracts, invest corporate funds, spend corporate funds for corporate purposes, and engage in any other activity in furtherance of, incidental to, or connected with any of the foregoing purposes.

**Article IV
MEMBERS/STOCK**

The corporation shall not have any class of members or stock.

**Article V
BY-LAWS**

IDAHO SECRETARY OF STATE
08/21/2009 05:00
CK: 388451 CT: 172899 SH: 1163993
1 @ 30.00 = 30.00 INC NONP # 2
1 @ 28.00 = 28.00 NON EXPED # 3

C184222

Provisions for the regulation of the internal affairs of the corporation shall be set forth in the By-Laws of the corporation.

**Article VI
DIRECTORS**

The number of directors of the Corporation shall be no less than three (3) and no more than seven (7), as fixed from time to time in accordance with the Bylaws of the Corporation. The number of directors constituting the initial Board of Directors of the Corporation is five (5), and the names and addresses of the persons who are to serve as directors until their successors are elected and shall qualify are:

Blair Crouch
362 East 500 North
Jerome, Idaho 83338

Scott Bybee
5651 US Highway 93
Jerome, Idaho 83338

Anneli Crouch
362 East 500 North
Jerome, Idaho 83338

Amanda Bingham
111 East 50 North
Jerome, Idaho 83338

Kelly Bangerter
908 East Avenue F
Jerome, Idaho 83338

**Article VII
INCORPORATORS**

The names and addresses of the incorporators are:

Blair Crouch
362 East 500 North
Jerome, Idaho 83338

Scott Bybee
5651 US Highway 93
Jerome, Idaho 83338

Anneli Crouch
362 East 500 North
Jerome, Idaho 83338

Amanda Bingham
111 East 50 North
Jerome, Idaho 83338

Kelly Bangerter
908 East Avenue F
Jerome, Idaho 83338

**Article VIII
REGISTERED OFFICE AND AGENT**

The address of the corporation's initial registered office shall be: 112 South Lincoln Ste 5 Jerome, Idaho 83338, and the corporation's initial registered agent at such address

shall be: **Blair Crouch**. Such office may be changed at any time by the Board of Directors without amendment of these Articles of Incorporation.

The mailing address of the corporation shall be: P.O. Box 378; Jerome, Idaho 83338

**Article IX
PRINCIPAL PLACE OF BUSINESS**

The principal place of business of this Corporation shall be Jerome County, Idaho. The business of this Corporation may be conducted in all counties of the State of Idaho and in all states of the United States, and in all territories thereof, and in all foreign countries as the Board of Directors shall determine.

**Article X
DISTRIBUTIONS**

The property of the corporation is irrevocably dedicated to educational purposes, and no part of the net earnings of the corporation shall inure to the benefit of, or be distributable to its directors, trustees, officers, or other private persons, except that the corporation shall be authorized and empowered to pay reasonable compensation for services rendered and to make payments and distributions in furtherance of the purposes set forth in Article III hereof.

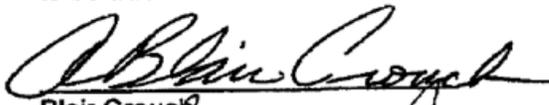
**Article XI
LIMITATIONS**

No substantial part of the activities of the corporation shall be the carrying on of propoganda, or otherwise attempting to influence legislation, and the corporation shall not participate in, or intervene in (including the publishing or distribution of statements) any political campaign on behalf of or in opposition to any candidate for public office. Notwithstanding any other provision of these Articles of Incorporation, the corporation shall not carry on any other activities not permitted to be carried on (a) by a corporation exempt from federal income tax under Section 501(c)(3) of the Internal Revenue Code, as amended or supplemented, or (b) by a corporation, contributions to which are deductible under Section 170(c)(2) of the Internal Revenue Code, as amended or supplemented.

**Article XI
DISSOLUTION**

Upon the dissolution and winding up of the corporation, all assets after payment, or provision for payment, of all debts and liabilities of the corporation shall be distributed to a nonprofit fund, foundation, or corporation that is organized and operated exclusively for educational purposes and which has established its tax exempt status under Section 501(c)(3) of the Internal Revenue Code of 1986, or corresponding provisions of any

subsequent federal tax laws Any such assets not so disposed of shall be disposed of by the District Court of the county in which the principal office of the corporation is then located, exclusively for such purposes or to such organization or organizations, as said Court shall determine, which are organized and operated exclusively for such purposes. In Witness Whereof, we, Blair Crouch, Scott Bybee, Anneli Crouch, Kelly Bangerter, and Amanda Bingham have executed these Articles of Incorporation in duplicate this 21 day of August, 2009, and say: That they are all incorporators herein; that they have read the above and foregoing Articles of Incorporation; know the contents thereof and that the same is true to the best of their knowledge and belief, excepting as to matters herein alleged upon information and belief and as to those matters they believe to be true.



Blair Crouch



Anneli Crouch



Amanda Bingham



Scott Bybee



Kelly Bangerter

AMENDED AND RESTATED
ARTICLES OF INCORPORATION
OF
HERITAGE ACADEMY CHARTER SCHOOL, INC.

Pursuant to the provisions of Section 30-3-90 and 94 of the Idaho Nonprofit Corporation Act, the undersigned adopts the following Amended and Restate Articles of Incorporation:

Article I
NAME

The name of the corporation is Heritage Academy, Inc.

Article II
DURATION

The period of duration of the corporation is perpetual.

Article III
PURPOSE

(a) The corporation is created to act and operate exclusively as a nonprofit corporation pursuant to the Idaho Nonprofit Corporation Act as amended and supplemented. The purpose for which the corporation is created is to establish and operate a public charter school and educational activities related thereto.

(b) The general purpose for which the corporation is formed is to operate exclusively for such educational purposes and any and all other lawful purposes, activities and pursuits which are substantially similar to and reasonably related to the foregoing as will qualify it as an exempt organization under Section 501(c)(3) of the Internal Revenue Code.

(c) The corporation may solicit and receive contributions, purchase, own and sell real and personal property, make contracts, invest corporate funds, spend corporate funds for corporate purposes, and engage in any other activity in furtherance of, incidental to, or connected with any of the foregoing purposes.

Article IV
MEMBERS/STOCK

The corporation shall not have any class of members or stock.

**Article V
BY-LAWS**

Provisions for the regulation of the internal affairs of the corporation shall be set forth in the Bylaws of the corporation.

**Article VI
DIRECTORS**

In order for the Corporation to conduct business, a quorum, as set forth and defined in the Bylaws, must be present. The number of directors of the Corporation shall be no less than three (3) and no more than seven (7), as fixed from time to time in accordance with the Bylaws of the Corporation. The number of directors constituting the initial Board of Directors of the Corporation is five (5), and the names and addresses of the persons who are to serve as directors until their successors are elected and shall qualify are:

Blair Crouch
362 East 500 North
Jerome, Idaho 83338

Scott Bybee
5651 US Highway 93
Jerome, Idaho 83338

Anneli Crouch
362 East 500 North
Jerome, Idaho 83338

Amanda Bingham
111 East 50 North
Jerome, Idaho 83338

Kelly Bangerter
908 East Avenue F
Jerome, Idaho 83338

**Article VII
INCORPORATORS**

The names and addresses of the incorporators are:

Blair Crouch
362 East 500 North
Jerome, Idaho 83338

Scott Bybee
5651 US Highway 93
Jerome, Idaho 83338

Anneli Crouch
362 East 500 North
Jerome, Idaho 83338

Amanda Bingham
111 East 50 North
Jerome, Idaho 83338

Kelly Bangerter
908 East Avenue F
Jerome, Idaho 83338

**Article VIII
REGISTERED OFFICE AND AGENT**

The address of the corporation's initial registered office shall be: **362 East 500 North Jerome, Idaho 83338**, and the corporation's initial registered agent at such address shall be: **Blair Crouch**. Such office may be changed at any time by the Board of Directors without amendment of these Articles of Incorporation.

The mailing address of the corporation shall be: P.O. Box 378; Jerome, Idaho 83338

**Article IX
PRINCIPAL PLACE OF BUSINESS**

The principal place of business of this Corporation shall be Jerome County, Idaho. The business of this Corporation may be conducted in all counties of the State of Idaho and in all states of the United States, and in all territories thereof, and in all foreign countries as the Board of Directors shall determine.

**Article X
DISTRIBUTIONS**

The property of the corporation is irrevocably dedicated to educational purposes, and no part of the net earnings of the corporation shall inure to the benefit of, or be distributable to its directors, trustees, officers, or other private persons, except that the corporation shall be authorized and empowered to pay reasonable compensation for services rendered and to make payments and distributions in furtherance of the purposes set forth in Article III hereof.

**Article XI
LIMITATIONS**

No substantial part of the activities of the corporation shall be the carrying on of propaganda, or otherwise attempting to influence legislation, and the corporation shall not participate in, or intervene in (including the publishing or distribution of statements) any political campaign on behalf of or in opposition to any candidate for public office. Notwithstanding any other provision of these Amended and Restated Articles of Incorporation, the corporation shall not carry on any other activities not permitted to be carried on (a) by a corporation exempt from federal income tax under Section 501(c)(3) of the Internal Revenue Code, as amended or supplemented, or (b) by a corporation, contributions to which are deductible under Section 170(c)(2) of the Internal Revenue Code, as amended or supplemented.

**ARTICLE XII
AMENDMENT OF ARTICLES OF INCORPORATION**

The Corporation reserves the right to amend or repeal any provisions contained in these Articles of Incorporation or any amendment to them, and all rights and privileges conferred upon the members, directors, and officers are subject to this reservation. The Articles of Incorporation may be amended in accordance with the provisions of the laws of the State of Idaho, as amended from time to time, unless more specific provisions for amendments are adopted by the Corporation pursuant to Idaho law.

Amendments to these Articles of Incorporation shall require the assent of two-thirds (2/3) of the Directors.

**ARTICLE XIII
INDEMNIFICATION**

The Corporation shall indemnify each Officer and Director, including former Officers and Directors, to the full extent permitted by the laws of the State of Idaho.

**Article XIV
DISSOLUTION**

Upon the dissolution and winding up of the corporation, all assets after payment, or provision for payment, of all debts and liabilities of the corporation shall be distributed to the Corporation's authorizing entity. Any such assets not so disposed of shall be disposed of by the District Court of the county in which the principal office of the corporation is then located, exclusively for such purposes or to such organization or organizations, as said Court shall determine, which are organized and operated exclusively for such purposes.

[Remainder of page intentionally left blank]

APPENDIX C

IN WITNESS WHEREOF, we, Blair Crouch, Scott Bybee, Anneli Crouch, Kelly Bangerter, and Amanda Bingham have executed these Amended and Restated Articles of Incorporation in duplicate this 8th day of June, 2010, and say: That they are all incorporators herein; that they have read the above and foregoing Amended and Restated Articles of Incorporation; know the contents thereof and that the same is true to the best of their knowledge and belief, excepting as to matters herein alleged upon information and belief and as to those matters they believe to be true.

/Blair Crouch/
Blair Crouch

/Scott Bybee/
Scott Bybee

/Anneli Crouch/
Anneli Crouch

/Kelly Bangerter/
Kelly Bangerter

/Amanda Bingham/
Amanda Bingham

**BYLAWS
OF
HERITAGE ACADEMY, INC.
An Idaho Nonprofit Corporation**

ARTICLE 1: OFFICES

The corporation's principal office shall be fixed and located at such place within the boundaries of the County of Jerome , State of Idaho, as the Board of Directors ("Board") shall determine. The Board is granted full power and authority to change the principal office from one location to another.

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.

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 and Term of Directors

- a. The authorized number of Directors shall be no less than three (3) and no greater than seven (7) until changed by amendment of these Bylaws.
- b. Those Directors who are to be elected by the Board of Directors shall be so elected at the annual meeting of the Board of Directors then in the office. The existing Directors of the corporation shall nominate each Director. The duration of the term of each Director 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 before such time, to take office when the resignation becomes effective. A Director may be removed without cause by majority of the Directors then in office.

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 Directors 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 law shall be posted. The public, any board member or officer of the corporation shall place any desired item on the agenda of any board meeting by notifying in writing, no later than 5 business days prior to the scheduled board meeting, a description shall be delivered to the then acting secretary of the corporation.

Section 4.7 Annual Meetings

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

Section 4.8 Quarterly Meetings

Quarterly meetings of the Board shall be held 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, if there is such an officer, the President, 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 for the Board to act on behalf of the corporation, 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. A meeting at which a quorum is initially present may continue to transact business notwithstanding the withdrawal of Directors, if any action taken is approved by at least a majority of the required quorum for such meeting.~~

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.

Section 4.15 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 on the Charter on the conduct of the corporation's business.

Section 4.16 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 interest 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 President, Secretary, and Treasurer. The corporation may also have, at the discretion of the Board, one or more Vice Presidents, 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 chosen 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.

Section 5.3 Subordinate Officers

The Board may elect, and may empower the President 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, except for an officer chosen by the Board, 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 under any contract of employment.

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 President

Subject to such powers, the President 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 President shall preside at all meetings of the Board. The President has the general management powers and duties usually vested in the office of the President 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 Presidents

In the absence or disability of the President, the Vice President(s), if any are appointed shall, in order of their ranks as fixed by the Board or, if not ranked, the Vice President designated by the Board, perform all duties of the President and, when so acting, shall have all the powers of, and subject to all the restrictions upon, the President. The Vice President(s) 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 those 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 President 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 depositaries 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 two (2) members 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 the President or any Vice President and the Secretary or Treasurer of the corporation, unless the other person has actual knowledge that the signing officers has no authority to execute the same. Any such instruments may also be signed by the Board or a designated member of 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 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.

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.

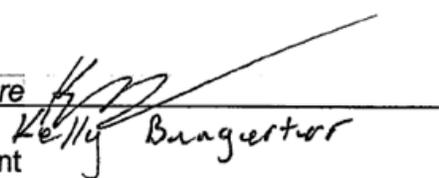
CERTIFICATE OF ADOPTION OF BYLAWS

I certify that I am the elected and acting President of Heritage Academy, Inc., an Idaho nonprofit corporation, and that the foregoing Bylaws constitute the Bylaws of such corporation as adopted by the Board of Directors.

Signature

NAME

President


Kelly Bragerton

Appendix D: Projected Budgets, Cash Flow, and Budget Assumptions

Best Case Budget

Heritage Academy Annual Budget Template Best Case									
	Year 1			Year 2			Year 3		
	Number	Rate	Amount	Number	Rate	Amount	Number	Rate	Amount
Number of Students	150			165			175		
Revenues:									
State Apportionment		\$ 4,107	\$616,122		\$3,897	\$643,017		\$3,674	\$643,017
State Transportation		75%	42,743		75%	47,648		75%	50,550
Nutrition Program	\$ -		0	\$ -		0	\$ -		0
Federal Grants			0			0			0
Albertsons Grant			60,000			40,000			0
Fundraising			500			750			750
Insert Revenue Lines Here									
Total Revenues			\$719,365			\$731,415			\$694,317
Holdbacks:									
Unknown state holdback		5%	\$32,943		5%	\$34,533		5%	\$34,678
* Holdback only applicable to state funds*									
Total Holdbacks			\$32,943			\$34,533			\$34,678
Expenses:									
Salaries:					0.0%			0.0%	
Teachers	\$32,500	5.5	\$178,750	\$ 32,500	6.5	\$211,250	\$ 32,500	6.5	\$211,250
Special Ed	\$33,000	1	33,000	\$ 33,000	1	33,000	\$ 33,000	1	33,000
Instructional Aids	\$ 6,840	2	13,680	\$ 6,840	2	13,681	\$ 6,840	2	13,678
Classified/Office Staff	\$16,720	0.5	8,360	\$ 16,720	0.5	8,360	\$ 16,720	0.5	8,360
Administration	\$65,000	1	65,000	\$ 65,000	1	65,000	\$ 65,001	1	65,001
Nutritional Program	\$30,000	0	0	\$ 30,000	0	\$0	\$ 30,000	0	0
Librarian	\$30,000	0	0	\$ 30,000	0	\$0	\$ 30,000	0	0
Maintenance/Other	\$30,000	0	0	\$ 30,000	0	\$0	\$ 30,000	0	0
Insert Salaries Lines Here						\$0			
Total Salaries			\$298,790			\$331,291			\$331,289
Benefits:									
Retirement/PERSI	10.4%		\$30,925	10.4%		\$34,289	10.4%		\$34,288
Health/Life Insurance	200		16,500	200		19,200	200		20,400
Payroll Taxes	7.7%		22,978	7.7%		25,476	7.7%		25,477
Workers Compensation	1.1%		3,290	1.1%		3,640	1.1%		3,640
Insert Benefits Lines Here									
Total Benefits			\$73,693			\$82,605			\$83,805
Operating Expenses:									
Textbooks	\$ 80		\$12,000	\$ 50		\$8,250	\$ 50		\$8,750
Supplies			\$7,500			\$7,500			\$7,500
Equipment/ Furniture			\$11,000			\$5,000			\$500
Technology			\$15,000			\$7,500			\$500
Contract Services			\$9,000			\$10,000			\$10,000
Legal			\$2,500			\$2,625			\$2,750
Accounting			\$1,500			\$7,500			\$7,500
Advertising/Marketing			\$2,500			\$2,625			\$2,750
Utilities			\$12,000			\$12,000			\$12,000
Liability & Property Insurance			\$8,500			\$8,750			\$8,750
Testing & Assessment			\$2,500			\$2,500			\$2,750
Staff Development			\$11,855			\$11,450			\$5,000
Rents and Leases			\$130,676			\$102,060			\$90,065
Permits and fees			\$1,000			\$1,000			\$1,000
Custodial supplies			\$6,500			\$7,000			\$7,500
Grounds & Maintenance			\$6,000			\$6,000			\$6,000
Substitutes			\$3,000			\$3,000			\$3,000
Insert OE Lines Here			0						
Total Operating Expenses			\$243,031			\$204,760			\$176,315

APPENDIX D

Program Expenses:							
Transportation	\$ 380	\$56,990	\$ 385	\$63,530	\$ 385	\$67,400	
Nutrition Program	\$ -	0	\$ -	0	\$ -	0	
<i>Insert Program Expenses Lines Here</i>							
Total Benefits		\$56,990		\$63,530		\$67,400	
Total Expenses & anticipated holdbacks		\$705,447		\$716,719		\$693,487	
Net Operating Income/(Loss)		\$13,918		\$14,696		\$830	
Beginning Fund Balance		0		13,918		28,614	
Ending Fund Balance (assuming 5% HB)		13,918		28,614		29,444	
Ending Fund Balance (assuming No HB)		46,861		110,008		174,130	

Federal Dollars NOT included above, but broken out by categories below on preliminary expected expenditures.

Federal Start up Grant	Year 1	Year 2	Year 3
Textbooks	20,000	15,000	15,000
Supplies	6,500	5,000	5,000
Equipment/ Furniture	7,500	7,500	5,500
Technology	10,000	8,000	7,500
Advertising/Marketing	1,000	1,500	1,500
Staff Development	30,000	13,000	15,500
Total Applicable expenditures	75,000	50,000	50,000
Federal Start up Grant Revenue	75,000	50,000	50,000
Fed Grant carryover	-	-	-

Albertsons Grant

** Albertsons Grant funds are to be used for any operational need of the charter school**

Charter Schools Only

Input Estimated Information	Estimated Fall Enrollment	Estimated ADA First Period	Estimated ADA Best 28 Weeks
<u>Kindergarten Administrative</u>	25	22.50	22.50
<u>Elementary Administrative</u>			
Grades 1-3	75	67.50	67.50
Grades 4-6	50	45.00	45.00
<u>Secondary Administrative</u>	0	0.00	0.00
Optional programs you may or may not have			
ALTERNATIVE HIGH SCHOOL			
Summer Alternative High School			
EXCEPTIONAL CHILD			
Number of Pre-school Students			
Hours and minutes of service per student per week			
Exceptional students eligible for tuition equivalency allowance			
Elementary			
Secondary			

Assumptions – Best case budget

Revenue

- Estimated 150 students grades K-6 (Year 1), using the support unit calculation sheets available on the state department of education’s website generating 8, 8.3 and 8.3 support units in the three years assuming 90% attendance in the calculations. With student enrollment progression as noted below.

<u>Year 1</u>							
<u>Grade</u>	<u>k</u>	<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>	<u>5</u>	<u>6</u>
<u>Class 1 size</u>	<u>25</u>	<u>25</u>	<u>25</u>	<u>25</u>	<u>25</u>	<u>15</u>	<u>10</u>
-							
<u>Year 2</u>							
<u>Grade</u>	<u>k</u>	<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>	<u>5</u>	<u>6</u>
<u>Class 1 size</u>	<u>25</u>	<u>25</u>	<u>25</u>	<u>25</u>	<u>25</u>	<u>25</u>	<u>15</u>
-							
<u>Year 3</u>							
<u>Grade</u>	<u>k</u>	<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>	<u>5</u>	<u>6</u>
<u>Class 1 size</u>	<u>25</u>						

- State Transportation reimbursement at 75% for the first year due to uncertainties as to route eligibility done for conservatism. This assumes the same 10% holdback on transportation as in FY 2010-2011 as well as an additional 5% holdback on all state payments in FY 2011-2012.
- The Albertsons grant is expected to be awarded with funds available based on conversations with the Grants Coordinator with the J.A. Kathryn Albertson Foundation. In this conversation it was made clear that the funds are required to be spent in the first year of operations, but could be used over multiple years as the school best sees fit.
- The budget excludes any allocations for The Federal Charter Start up Grant, Title I, Title IIa, IDEA, and Medicaid reimbursements, all of the listed items are expected to have some allocations associated with them, but were excluded for conservatism.
- Teacher experience was estimated and then extrapolated to an average wage based on an average instructor index of 1.4, multiplied by the base of \$23,565 we came to the average teacher salary of approximately \$33,000. If the actual teacher experience and education come in higher that that the revenue and salary expense will approximate each other causing no change to the end of the year fund balance projections.
 - **Holdbacks**
- Heritage Academy has been in contact with the SDE in relation to possible holdbacks for the 2011-2012 school year. No definite determination relating to holdbacks was noted, but the SDE indicated that it would be prudent to build a fund balance at a rate of 5% of state revenue a year. As the fiscal year 2010-2011 was recommended to expect a 5% holdback it

APPENDIX D

was thought that carrying that same holdback forward in order to build fund balance would be a prudent action to take.

- **Expenses**

- Staffing levels as noted at an average rate dependent upon experience and education. As the grades progress there is not an expectation to add teacher each year as we do not expect to add grades in the first three years.
- PERSI and payroll taxes at standard rates, health insurance will be paid via a benefit dollar stipend to be utilized to purchase medical insurance from provided options at \$200 per fulltime staff position dependent upon budget option.
- Trainings detailed in Appendix L are accounted for in the Staff Development line item.
- Initial textbook and furniture purchases will be made with general fund allocations, and supplemented with the Federal start up grant funds to supplement items purchased with general funds. Class could be conducted with only general fund purchases, but the items to be purchased with the start up grants will aid in producing a better learning environment for students.
- Facility rental amounts are based on estimations of setup and rental costs associated with the portable campus model noting the cost decrease in year two due to setup costs in the initial year that are not necessary in secondary years.
- Transportations estimates are based upon student counts and estimates of routes.

**Current Year Support Unit Calculation
Through reporting Period 1**

ADMINISTRATIVE UNITS	<u>A.D.A</u>	<u>Special Education</u>	<u>Adjusted A.D.A</u>	<u>Unit Divisor</u>	<u>Support Units</u>	
<u>Kindergarten Administrative</u>	<u>22.50</u>		<u>22.50</u>	÷ 40	= 0.75	Minimum
<u>Elementary Administrative</u> equals 300 or more:						
Grades 1-3	-	-	<u>0.00</u>	÷ 0	= 0.00	
Grades 4-6	-	-	<u>0.00</u>	÷ 0	= 0.00	
<u>Elementary Administrative</u> less than 300:						
Grades 1-6	<u>112.5</u>	- 9.00	<u>103.50</u>	÷ 16	= 6.47	
<u>Secondary Administrative</u>	-	-	<u>0.00</u>	÷ 0	= 0.00	
Exceptional Education						
Exceptional Preschool			<u> </u>			
Exceptional Elementary			<u>9.00</u>			
Exceptional Secondary			<u> </u>			
Exceptional Education Total			<u>9.00</u>	÷ 0	= 0.75	Minimum
ALTERNATIVE HIGH SCHOOL UNITS						
			<u>0.00</u>	÷ 0	= 0.00	
			<u>0.00</u>	÷ 0	= 0.00	
TOTAL Estimated Units (Round to nearest tenth)					= 8.0	

**Current Year Support Unit Calculation
Through reporting Period 1
Second copy for district without Secondary Special Education Approvals**

ADMINISTRATIVE UNITS	<u>A.D.A</u>	<u>Special Education</u>	<u>Adjusted A.D.A</u>	<u>Unit Divisor</u>	<u>Support Units</u>	
<u>Kindergarten Administrative</u>	<u>22.50</u>		<u>22.50</u>	÷ 40	= 0.75	Minimum
<u>Elementary Administrative</u> equals 300 or more:						
Grades 1-3	-	-	<u>0.00</u>	÷ 0	= 0	
Grades 4-6	-	-	<u>0.00</u>	÷ 0	= 0	
<u>Elementary Administrative</u> less than 300:						
Grades 1-6	<u>112.5</u>	- 9.00	<u>103.50</u>	÷ 16	= 6.47	
<u>Secondary Administrative</u>	<u>0.00</u>	-	<u>0.00</u>	÷ 0	= 0	
Exceptional Education						
Exceptional Preschool			<u> </u>			
Exceptional Elementary			<u>9.00</u>			
Exceptional Secondary			<u>0.00</u>			
Exceptional Education Total			<u>9.00</u>	÷ 0	= 0.75	Minimum
ALTERNATIVE HIGH SCHOOL UNITS						
			<u>0.00</u>	÷ 0	= 0.00	
			<u>0.00</u>	÷ 0	= 0.00	
Total Estimated Support Units (Round to nearest tenth)					= 8.0	

You May Use this Calculation

APPENDIX D

Required Data Elements for Calculating Salary Based Apportionment Include only staff paid from General Fund Money (code 10) For Budgeting Purposes 2010-2011

Charter Number		Charter Enters
Charter Name		Charter Enters
Charter February Support Units	8.0	Units - from 1st Reporting Period Support Unit Calculation
Separate Secondary School Allowance	N/A	Applies to School Charters with one or more Separate Secondary Schools (9-12) (I.C. 33-1004 (5)(d))
Charter Staff Index - Administration	2.01260	From "Index - Admin" worksheet (tabs at bottom of this worksheet) or Charter enters
Charter Staff Index - Instructional	1.4014	From "Index - Instr" worksheet (tabs at bottom of this worksheet) or Charter enters
Actual FTE - Administration	1.00000	From "Index - Admin" worksheet (tabs at bottom of this worksheet) or Charter enters
Actual FTE - Instructional	10.00000	From "Index - Instr" worksheet (tabs at bottom of this worksheet) or Charter enters
Actual FTE - Noncertified	8.00000	Charter Enters
Actual Total Salary - Administration	\$ 65,000	Charter Enters
Actual Total Salary - Instructional	\$ 211,750	Charter Enters
Actual Total Salary - Noncertified	\$ 22,040	Charter Enters
Minimum adj to \$29,655	\$1,310	From "\$29,655 min" worksheet (tabs at bottom of this worksheet) or Charter enters

INSTRUCTIONS:
 Blue Cells require data entry.
 Red Cells contain formulas. You may elect to complete the appropriate worksheet or override by entering the data

SUGGESTION: If you choose to override one of the "RED" numbers, change the font color to "BLUE", thus indicating the cell is no longer a formula.

	Staff Ratio	Calculated FTE	< 40 units then + 0.50	< 20 units then + 0.50	Separate Secondary School Allowance	Adjusted Staff Allowance	Actual FTE	Staff Allowance	Index	Base	Average Salary	Certified Preliminary Salary Based Apportionment
	a	(Units x a) b	c	d	e	(b + c + d + e) f	g	h	i	j	(i x j) k	(g x j) l
Administration	0.0750	0.6000				0.6000	1.0000	0.6000	2.01260	32,441	65,290.76	39,174.46
Instructional	1.1000	8.8000		N/A		8.8000	10.0000	8.8000	1.40140	23,565	33,023.99	290,611.11
Noncertified	0.3750	3.0000					8			19,041		
TOTAL:							19.0000					

	Noncertified Preliminary Salary Based Apportionment	Salary Allocation for Beginning Instructional Staff FTE	Maximum Federal Staff (Max 5%)	Maximum Allowed Apportionment	Actual Total Salary	Salary Based Apportionment Eligible for Benefits	Benefit Apportionment	Virtual Allowance	Ancillary Allowance	Salary Based Apportionment Plus Waivers	Maximum Salary Apportionment	Salary Based Apportionment Plus Waivers
	(b x j) m	(Min \$29,655) n	(Max 5%) o	(l + m + n + o) p	q	Smaller: p or q r	r x 0.1804 s	(Max 5%) t	u	(p or q) + t + u v	w	x
Administration				39,174.46	65,000 (Code 10)					39,174.46	39,174.46	39,174.46
Instructional		1,310.00	N/A	291,921.11	211,750 (Code 10)					211,750.00	291,921.11	291,921.11
Noncertified	57,123.00			57,123.00	22,040 (Code 10)					22,040.00	57,123.00	57,123.00
TOTAL:			0.00	388,218.57	298,790	298,790.00	53,901.72	0.00	0.00			388,218.57

EXPERIENCE AND EDUCATION MULTIPLIER TABLE
ADMINISTRATIVE INDEX

Year	BA	BA+12	BA+24	MA BA+36	MA+12 BA+48	MA+24 BA+60	MA+36 ES/DR
0	1.00000	1.03750	1.07640	1.11680	1.15870	1.20220	1.24730
1	1.03750	1.07640	1.11680	1.15870	1.20220	1.24730	1.29410
2	1.07640	1.11680	1.15870	1.20220	1.24730	1.29410	1.34260
3	1.11680	1.15870	1.20220	1.24730	1.29410	1.34260	1.39290
4	1.15870	1.20220	1.24730	1.29410	1.34260	1.39290	1.44510
5	1.20220	1.24730	1.29410	1.34260	1.39290	1.44510	1.49930
6	1.24730	1.29410	1.34260	1.39290	1.44510	1.49930	1.55550
7	1.29410	1.34260	1.39290	1.44510	1.49930	1.55550	1.61380
8	1.34260	1.39290	1.44510	1.49930	1.55550	1.61380	1.67430
9	1.39290	1.44510	1.49930	1.55550	1.61380	1.67430	1.73710
10	1.39290	1.49930	1.55550	1.61380	1.67430	1.73710	1.80220
11	1.39290	1.49930	1.55550	1.61380	1.73710	1.80220	1.86980
12	1.39290	1.49930	1.55550	1.61380	1.73710	1.86980	1.93990
13 or more	1.39290	1.49930	1.55550	1.61380	1.73710	1.86980	2.01260

QUALIFYING FTE PLACEMENT

Year	BA	BA+12	BA+24	MA BA+36	MA+12 BA+48	MA+24 BA+60	MA+36 ES/DR
0							
1							
2							
3							
4							
5							
6							
7							
8							
9							
10							
11							
12							
13							
14						-	
15 or more							1.00000
TOTALS	-	-	-	-	-	-	1.00000
TOTAL FTE							1.00000

FACTORED FTE PLACEMENT

Year	BA	BA+12	BA+24	MA BA+36	MA+12 BA+48	MA+24 BA+60	MA+36 ES/DR
0	-	-	-	-	-	-	-
1	-	-	-	-	-	-	-
2	-	-	-	-	-	-	-
3	-	-	-	-	-	-	-
4	-	-	-	-	-	-	-
5	-	-	-	-	-	-	-
6	-	-	-	-	-	-	-
7	-	-	-	-	-	-	-
8	-	-	-	-	-	-	-
9	-	-	-	-	-	-	-
10	-	-	-	-	-	-	-
11	-	-	-	-	-	-	-
12	-	-	-	-	-	-	-
13	-	-	-	-	-	-	-
14	-	-	-	-	-	-	-
15 or more	-	-	-	-	-	-	2.01260
TOTALS	-	-	-	-	-	-	2.01260
FACTOR							2.01260
INDEX							2.01260

EXPERIENCE AND EDUCATION MULTIPLIER TABLE
INSTRUCTIONAL INDEX

Year	BA	BA+12	BA+24	MA BA+36	MA+12 BA+48	MA+24 BA+60	MA+36 ES/DR
0	1.00000	1.03750	1.07640	1.11680	1.15870	1.20220	1.24730
1	1.03750	1.07640	1.11680	1.15870	1.20220	1.24730	1.29410
2	1.07640	1.11680	1.15870	1.20220	1.24730	1.29410	1.34260
3	1.11680	1.15870	1.20220	1.24730	1.29410	1.34260	1.39290
4	1.15870	1.20220	1.24730	1.29410	1.34260	1.39290	1.44510
5	1.20220	1.24730	1.29410	1.34260	1.39290	1.44510	1.49930
6	1.24730	1.29410	1.34260	1.39290	1.44510	1.49930	1.55550
7	1.29410	1.34260	1.39290	1.44510	1.49930	1.55550	1.61380
8	1.34260	1.39290	1.44510	1.49930	1.55550	1.61380	1.67430
9	1.39290	1.44510	1.49930	1.55550	1.61380	1.67430	1.73710
10	1.39290	1.49930	1.55550	1.61380	1.67430	1.73710	1.80220
11	1.39290	1.49930	1.55550	1.61380	1.73710	1.80220	1.86980
12	1.39290	1.49930	1.55550	1.61380	1.73710	1.86980	1.93990
13 or more	1.39290	1.49930	1.55550	1.61380	1.73710	1.86980	2.01260

QUALIFYING FTE PLACEMENT

Year	BA	BA+12	BA+24	MA BA+36	MA+12 BA+48	MA+24 BA+60	MA+36 ES/DR
0							
1							
2							
3							
4							
5				5.00000			
6							
7							
8							
9					-		
10					5.00000		
11							
12							
13							
14							
15 or more							
TOTALS	-	-	-	5.00000	5.00000	-	-
TOTAL							10.00000

FACTORED FTE PLACEMENT

Year	BA	BA+12	BA+24	MA BA+36	MA+12 BA+48	MA+24 BA+60	MA+36 ES/DR
0	-	-	-	-	-	-	-
1	-	-	-	-	-	-	-
2	-	-	-	-	-	-	-
3	-	-	-	-	-	-	-
4	-	-	-	-	-	-	-
5	-	-	-	6.23650	-	-	-
6	-	-	-	-	-	-	-
7	-	-	-	-	-	-	-
8	-	-	-	-	-	-	-
9	-	-	-	-	-	-	-
10	-	-	-	-	7.77750	-	-
11	-	-	-	-	-	-	-
12	-	-	-	-	-	-	-
13	-	-	-	-	-	-	-
14	-	-	-	-	-	-	-
15 or more	-	-	-	-	-	-	-
TOTALS	-	-	-	6.23650	7.77750	-	-
FACTOR							14.01400
INDEX							1.40140

Worst-Cast Budget

Heritage Academy Annual Budget Template Worst Case									
	Year 1			Year 2			Year 3		
	Number	Rate	Amount	Number	Rate	Amount	Number	Rate	Amount
Number of Students	140			153			164		
Revenues:									
State Apportionment		\$ 4,100	\$574,053		\$4,111	\$628,995		\$3,878	\$636,006
State Transportation		75%	39,893		75%	43,605		75%	46,725
Nutrition Program	\$ -		0	\$ -		0	\$ -		0
Federal Grants			0			0			0
Albertsons Grant			75,000			25,000			0
Fundraising			500			750			750
Insert Revenue Lines Here									
Total Revenues			\$689,446			\$698,350			\$683,481
Holdbacks:									
Unknown state holdback		5%	\$30,697		5%	\$33,630		5%	\$34,137
* Holdback only applicable to state funds*									
Total Holdbacks			\$30,697			\$33,630			\$34,137
Expenses:									
Salaries:					0.0%			0.0%	
Teachers	\$32,500	5.5	\$178,750	\$ 32,500	6.5	\$211,250	\$ 32,500	6.5	\$211,250
Special Ed	\$33,000	1	33,000	\$ 33,000	1	33,000	\$ 33,000	1	33,000
Instructional Aids	\$ 6,840	2	13,680	\$ 6,840	2	13,681	\$ 6,840	2	13,678
Classified/Office Staff	\$16,720	0.5	8,360	\$ 16,720	0.5	8,360	\$ 16,720	0.5	8,360
Administration	\$65,000	1	65,000	\$ 65,000	1	65,000	\$ 65,000	1	65,000
Nutritional Program	\$30,000	0	0	\$ 30,000	0	\$0	\$ 30,000	0	0
Librarian	\$30,000	0	0	\$ 30,000	0	\$0	\$ 30,000	0	0
Maintenance/Other	\$30,000	0	0	\$ 30,000	0	\$0	\$ 30,000	0	0
Insert Salaries Lines Here						\$0			
Total Salaries			\$298,790			\$331,291			\$331,288
Benefits:									
Retirement/PERSI	10.4%		\$30,925	10.4%		\$34,289	10.4%		\$34,288
Health/Life Insurance	175		14,438	175		16,800	175		17,850
Payroll Taxes	7.7%		22,978	7.7%		25,476	7.7%		25,477
Workers Compensation	1.1%		3,290	1.1%		3,640	1.1%		3,640
Insert Benefits Lines Here									
Total Benefits			\$71,631			\$80,205			\$81,255
Operating Expenses:									
Textbooks	\$ 80		\$11,200	\$ 50		\$7,650	\$ 25		\$4,100
Supplies			\$4,500			\$5,000			\$6,000
Equipment/ Furniture			\$10,000			\$1,000			\$250
Technology			\$10,000			\$5,000			\$250
Contract Services			\$6,500			\$7,500			\$7,500
Legal			\$2,250			\$2,500			\$2,500
Accounting			\$1,500			\$7,500			\$7,500
Advertising/Marketing			\$2,500			\$2,625			\$2,750
Utilities			\$10,000			\$11,000			\$12,000
Liability & Property Insurance			\$8,500			\$8,750			\$8,750
Testing & Assessment			\$2,500			\$2,500			\$2,750
Staff Development			\$11,855			\$11,450			\$5,000
Rents and Leases			\$130,676			\$107,967			\$102,060
Permits and fees			\$1,000			\$1,000			\$1,000
Custodial supplies			\$4,000			\$4,000			\$4,000
Grounds & Maintenance			\$3,500			\$3,500			\$3,500
Substitutes			\$2,500			\$2,500			\$2,500
Insert OE Lines Here			0			0			0
Total Operating Expenses			\$222,981			\$191,442			\$172,410

APPENDIX D

July 2010	August 2010	September 2010	October 2010	November 2010	December 2010	January 2011	February 2011	March 2011	April 2011	May 2011	June 2011	Total FY 2011
	107,760		107,760	71,840			35,920			35,920		359,200
	16,171		16,171	10,781			5,390			5,390		53,903
	48,285		48,285	32,190			16,095			16,095		160,950
									500			500
												-
			19,947					19,947				39,893
75,000												75,000
75,000	172,216	-	192,162	114,811	-	-	57,405	19,947	500	57,405	-	689,446
	5,417	5,417	5,417	5,417	5,417	5,417	5,417	5,417	5,417	5,417	5,417	65,000
17,646	17,646	17,646	17,646	17,646	17,646	17,646	17,646	17,646	17,646	17,646	17,646	211,750
1,837	1,837	1,837	1,837	1,837	1,837	1,837	1,837	1,837	1,837	1,837	1,837	22,040
24,899	24,899	24,899	24,899	24,899	24,899	24,899	24,899	24,899	24,899	24,899	24,899	298,790
4,492	4,492	4,492	4,492	4,492	4,492	4,492	4,492	4,492	4,492	4,492	4,493	53,903
-	-	-	-	-	-	-	-	-	-	-	-	-
1,477	1,477	1,477	1,477	1,477	1,477	1,477	1,477	1,477	1,477	1,477	1,477	17,728
5,969	5,969	5,969	5,969	5,969	5,969	5,969	5,969	5,969	5,969	5,969	5,970	71,630
-	-	-	-	-	-	-	-	-	-	-	-	-
-	-	1,000	-	-	1,000	-	-	-	-	-	500	2,500
-	-	-	-	-	-	-	-	-	-	-	1,500	1,500
-	1,078	1,078	1,078	1,078	1,078	1,078	1,078	1,078	1,078	1,078	1,078	11,855
188	188	188	188	188	188	188	188	188	188	188	188	2,250
-	-	-	-	-	-	-	-	-	2,500	-	-	2,500
500	500	500	500	500	500	500	500	500	500	500	500	6,000
208	208	208	208	208	208	208	208	208	208	208	208	2,500
-	591	591	591	591	591	591	591	591	591	591	591	6,500
-	250	250	250	250	250	250	250	250	250	250	-	2,500
-	4,835	4,835	4,835	4,835	4,835	4,835	4,835	4,835	4,835	4,835	4,835	53,190
896	7,650	8,650	7,650	7,650	8,650	7,650	7,650	7,650	10,150	7,650	9,400	91,295
-	11,880	11,880	11,880	11,880	11,880	11,880	11,880	11,880	11,880	11,880	11,880	130,676
	500					500						1,000
	318	318	318	318	318	318	318	318	318	318	318	3,500
-	909	909	909	909	909	909	909	909	909	909	909	10,000
-	13,607	13,107	13,107	13,107	13,107	13,607	13,107	13,107	13,107	13,107	13,107	145,176
12,500	15,000	-		(16,300)	-							11,200
375	375	375	375	375	375	375	375	375	375	375	375	4,500
-	364	364	364	364	364	364	364	364	364	364	364	4,000
12,875	15,739	739	739	(15,561)	739	739	739	739	739	739	739	19,700
-	3,000	-	-	-	-	-	-	-	-	-	-	3,000
-	2,500	-	-	-	-	-	-	-	-	-	-	2,500
-	-	-	-	-	-	-	-	-	-	-	-	-
-	-	-	-	-	-	-	-	-	-	-	-	-
-	5,000	-	-	-	-	-	-	-	-	-	-	5,000
-	5,000	-	-	-	-	-	-	-	-	-	-	5,000
-	2,500	-	-	-	-	-	-	-	-	-	-	2,500
-	2,000	-	-	-	-	-	-	-	-	-	-	2,000
-	20,000	-	-	-	-	-	-	-	-	-	-	20,000
44,639	87,864	53,364	52,364	36,064	53,364	52,864	52,364	52,364	54,864	52,364	54,115	646,591
-	-	-	-	-	-	-	-	-	-	-	30,697	30,697
30,361	84,352	(53,364)	139,799	78,747	(53,364)	(52,864)	5,042	(32,417)	(54,364)	5,042	(84,812)	12,157
30,361	114,713	61,349	201,148	279,895	226,531	173,667	178,709	146,292	91,928	96,970	12,157	

Assumptions – Worst Case Budget

Revenue

- 140 students grades K-6 (Year 1), utilizing the support unit calculation sheets available on the state department of education’s website generating 7.4, 8.1 and 8.2 support units in the three years assuming 90% attendance in the calculations. With student enrollment progression as noted below.

<u>Year 1</u>							
Grade	<u>k</u>	<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>	<u>5</u>	<u>6</u>
Class 1 size	<u>23</u>	<u>24</u>	<u>24</u>	<u>23</u>	<u>22</u>	<u>13</u>	<u>11</u>
<u>Year 2</u>							
Grade	<u>k</u>	<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>	<u>5</u>	<u>6</u>
Class 1 size	<u>23</u>	<u>24</u>	<u>24</u>	<u>24</u>	<u>23</u>	<u>22</u>	<u>13</u>
<u>Year 3</u>							
Grade	<u>k</u>	<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>	<u>5</u>	<u>6</u>
Class 1 size	<u>23</u>	<u>24</u>	<u>24</u>	<u>24</u>	<u>24</u>	<u>23</u>	<u>22</u>

- State Transportation reimbursement at 75% for the first year due to uncertainties as to route eligibility done for conservatism. This assumes the same 10% holdback on transportation as in FY 2010-2011 as well as an additional 5% holdback on all state payments in FY 2011-2012.
- The Albertsons grant is expected to be awarded with funds available based on conversations with the Grants Coordinator with the J.A. Kathryn Albertson Foundation. In this conversation it was made clear that the funds are required to be spent in the first year of operations, but could be used over multiple years as the school best sees fit.
- The budget excludes any allocations for The Federal Charter Start up Grant, Title I, Title IIa, IDEA, and Medicaid reimbursements, all of the listed items are expected to have some allocations associated with them, but were excluded for conservatism.
- Teacher experience was estimated and then extrapolated to an average wage based on an average instructor index of 1.4, multiplied by the base of \$23,565 we came to the average teacher salary of approximately \$33,000. If the actual teacher experience and education come in higher that that the revenue and salary expense will approximate each other causing no change to the end of the year fund balance projections.
 - **Holdbacks**
- Heritage Academy has been in contact with the SDE in relation to possible holdbacks for the 2011-2012 school year. No definite determination relating to holdbacks was noted, but the SDE indicated that it would be prudent to build a fund balance at a rate of 5% of state

APPENDIX D

revenue a year. As the fiscal year 2010-2011 was recommended to expect a 5% holdback it was thought that carrying that same holdback forward in order to build fund balance would be a prudent action to take.

- **Expenses**

- Staffing levels as noted at an average rate dependent upon experience and education. As the grades progress there is not an expectation to add teacher each year as we do not expect to add grades in the first three years.
- PERSI and payroll taxes at standard rates, health insurance will be paid via a benefit dollar stipend to be utilized to purchase medical insurance from provided options at \$175 per fulltime staff position dependent upon budget option.
- Trainings detailed in Appendix L are accounted for in the Staff Development line item.
- Initial textbook and furniture purchases will be made with general fund allocations, and supplemented with the Federal start up grant funds to supplement items purchased with general funds. Class could be conducted with only general fund purchases, but the items to be purchased with the start up grants will aid in producing a better learning environment for students.
- Facility rental amounts are based on estimations of setup and rental costs associated with the portable campus model noting the cost decrease in year two due to setup costs in the initial year that are not necessary in secondary years.
- Transportations estimates are based upon student counts and estimates of routes and the like.

Charter Schools Only			
Input Estimated Information			
	Estimated Fall Enrollment	Estimated ADA First Period	Estimated ADA Best 28 Weeks
<u>Kindergarten Administrative</u>	23	20.70	20.70
<u>Elementary Administrative</u>			
Grades 1-3	71	63.90	63.90
Grades 4-6	46	41.40	41.40
<u>Secondary Administrative</u>	0	0.00	0.00
Optional programs you may or may not have			
<u>ALTERNATIVE HIGH SCHOOL</u>			
Summer Alternative High School			
<u>EXCEPTIONAL CHILD</u>			
	Number of Pre-school Students		
	Hours and minutes of service per student per week		
<u>Exceptional students eligible for tuition equivalency allowance</u>			
	Elementary		
	Secondary		

**Current Year Support Unit Calculation
Through reporting Period 1
Second copy for district without Secondary Special Education Approvals**

ADMINISTRATIVE UNITS	<u>A.D.A</u>	<u>Special Education</u>	<u>Adjusted A.D.A</u>	<u>Unit Divisor</u>	<u>Support Units</u>	
<u>Kindergarten Administrative</u>	20.70		20.70	÷ 40	= 0.60	Minimum
<u>Elementary Administrative</u> equals 300 or more:						
Grades 1-3	_____	-	= 0.00	÷ 0	= 0	
Grades 4-6	_____	-	= 0.00	÷ 0	= 0	
<u>Elementary Administrative</u> less than 300:						
Grades 1-6	105.3	-	8.40 = 96.90	÷ 16	= 6.06	
<u>Secondary Administrative</u>	0.00	-	= 0.00	÷ 0	= 0	
Exceptional Education						
Exceptional Preschool			_____			
Exceptional Elementary			8.40			
Exceptional Secondary			0.00			
Exceptional Education Total			8.40	÷ 0	= 0.75	Minimum
ALTERNATIVE HIGH SCHOOL UNITS			0.00	÷ 0	= 0.00	
			0.00	÷ 0	= 0.00	
Total Estimated Support Units (Round to nearest tenth)					= 7.4	

You May Use this Calculation

**Current Year Support Unit Calculation
BEST 28 WEEKS
Without Secondary Special Education Approvals**

ADMINISTRATIVE UNITS	<u>A.D.A</u>	<u>Special Education</u>	<u>Adjusted A.D.A</u>	<u>Unit Divisor</u>	<u>Support Units</u>	
<u>Kindergarten Administrative</u>	20.70		20.70	÷ 40	= 0.60	Minimum
<u>Elementary Administrative</u> equals 300 or more:						
Grades 1-3	_____	-	= 0.00	÷ 0	= 0.00	
Grades 4-6	_____	-	= 0.00	÷ 0	= 0.00	
<u>Elementary Administrative</u> less than 300:						
Grades 1-6	105.3	-	8.40 = 96.90	÷ 16	= 6.06	
<u>Secondary Administrative</u>	_____	-	= 0.00	÷ 0	= 0.00	
EXCEPTIONAL CHILD UNITS						
Preschool Approvals			_____			
Elementary Approvals			8.40			
Secondary Approvals			0.00			
Total Exceptional A.D.A			8.40	÷ 0	= 0.75	Minimum
ALTERNATIVE HIGH SCHOOL UNITS			0.00	÷ 0	= 0.00	
			0.00	÷ 0	= 0.00	
TOTAL Estimated Units (Round to nearest tenth)					= 7.4	

You May Use this Calculation

Required Data Elements for Calculating Salary Based Apportionment
Include only staff paid from General Fund Money (code 10)
For Budgeting Purposes 2010-2011

Charter Number		Charter Enters
Charter Name		Charter Enters
Charter February Support Units	7.4	Units - from 1st Reporting Period Support Unit Calculation
Separate Secondary School Allowance	N/A	Applies to School Charters with one or more Separate Secondary Schools (9-12) (I.C. 33-1004 (5)(d))
Charter Staff Index - Administration	2.01260	From "Index - Admin" worksheet (tabs at bottom of this worksheet) or Charter enters
Charter Staff Index - Instructional	1.4014	From "Index - Instr" worksheet (tabs at bottom of this worksheet) or Charter enters
Actual FTE - Administration	1.00000	From "Index - Admin" worksheet (tabs at bottom of this worksheet) or Charter enters
Actual FTE - Instructional	10.00000	From "Index - Instr" worksheet (tabs at bottom of this worksheet) or Charter enters
Actual FTE - Noncertified	8.00000	Charter Enters
Actual Total Salary - Administration	\$ 65,000	Charter Enters
Actual Total Salary - Instructional	\$ 211,750	Charter Enters
Actual Total Salary - Noncertified	\$ 22,040	Charter Enters
Minimum adj to \$29,655	\$1,310	From "\$29,655 min" worksheet (tabs at bottom of this worksheet) or Charter enters

INSTRUCTIONS:
 Blue Cells require data entry.
 Red Cells contain formulas. You may elect to complete the appropriate worksheet or override by entering the data

SUGGESTION: If you choose to override one of the "RED" numbers, change the font color to "BLUE", thus indicating the cell is no longer a formula.

Idaho Department of Education
 Basic Education Data System
 Salary Based Apportionment and Benefit Apportionment Computation
 School Year 2010 / 2011

Charter 000 0

Statewide Information:				Charter School Information:			
Statewide Administrative Staff Index	1.86643			Charter School Administrative Staff Index	2.01260		
Statewide Administrative Staff Index Cap	1.86643	100.00%		Charter School Administrative Staff Index (adjusted for cap)	2.01260		
Statewide Instructional Staff Index	1.59092			Charter School Instructional Staff Index	1.40140		
Statewide Instructional Staff Index Cap	1.59092	100.00%		Charter School Instructional Staff Index (adjusted for cap)	1.40140		
PERSI, FICA, MEDICARE Rate	0.180400			Charter School February Support Units:	7.4		

	Staff Ratio	Calculated FTE	< 40 units then + 0.50	< 20 units then + 0.50	Separate Secondary School Allowance	Adjusted Staff Allowance	Actual FTE	Staff Allowance	Index	Base	Average Salary	Certified Preliminary Salary Based Apportionment
	a	(Units x a) b	c	d	e	(b + c + d + e) f	g	h	i	j	(i x j) k	(g x j) l
Administration	0.0750	0.5550				0.5550	1.0000	0.5550	2.01260	32,441	65,290.76	36,236.37
Instructional	1.1000	8.1400		N/A		8.1400	10.0000	8.1400	1.40140	23,565	33,023.99	268,815.28
Noncertified	0.3750	2.7750					8			19,041		
TOTAL:							19.0000					

	Noncertified Salary Allocation Preliminary for Beginning Salary Based Apportionment	Maximum Federal Staff	Maximum Allowed Apportionment	Actual Total Salary	Salary Based Apportionment Eligible for Benefits	Benefit Apportionment	Virtual Allowance	Ancillary Allowance	Salary Based Apportionment Plus Waivers smaller of	Maximum Salary Apportionment	Salary Based Apportionment Plus Waivers
	(b x j) m	(Min \$29,655) n	(Max 5%) o	(i + m + n + o) p	q	Smaller: p or q r	s	(Max 5%) t	(p or q) + t + u v	w	x
Administration				36,236.37	65,000 (Code 10)				36,236.37	36,236.37	36,236.37
Instructional		1,310.00	N/A	270,125.28	211,750 (Code 10)				211,750.00	270,125.28	270,125.28
Noncertified	52,838.78			52,838.78	22,040 (Code 10)				22,040.00	52,838.78	52,838.78
TOTAL:			0.00	359,200.43	298,790	298,790.00	53,901.72	0.00	0.00		359,200.43

BENEFIT APPORTIONMENT

SALARY BASED APPORTIONMENT

EXPERIENCE AND EDUCATION MULTIPLIER TABLE

ADMINISTRATIVE INDEX

Year	ADMINISTRATIVE INDEX						
	BA	BA+12	BA+24	MA BA+36	MA+12 BA+48	MA+24 BA+60	MA+36 ES/DR
0	1.00000	1.03750	1.07640	1.11680	1.15870	1.20220	1.24730
1	1.03750	1.07640	1.11680	1.15870	1.20220	1.24730	1.29410
2	1.07640	1.11680	1.15870	1.20220	1.24730	1.29410	1.34260
3	1.11680	1.15870	1.20220	1.24730	1.29410	1.34260	1.39290
4	1.15870	1.20220	1.24730	1.29410	1.34260	1.39290	1.44510
5	1.20220	1.24730	1.29410	1.34260	1.39290	1.44510	1.49930
6	1.24730	1.29410	1.34260	1.39290	1.44510	1.49930	1.55550
7	1.29410	1.34260	1.39290	1.44510	1.49930	1.55550	1.61380
8	1.34260	1.39290	1.44510	1.49930	1.55550	1.61380	1.67430
9	1.39290	1.44510	1.49930	1.55550	1.61380	1.67430	1.73710
10	1.39290	1.49930	1.55550	1.61380	1.67430	1.73710	1.80220
11	1.39290	1.49930	1.55550	1.61380	1.73710	1.80220	1.86980
12	1.39290	1.49930	1.55550	1.61380	1.73710	1.86980	1.93990
13 or more	1.39290	1.49930	1.55550	1.61380	1.73710	1.86980	2.01260

QUALIFYING FTE PLACEMENT

Year	QUALIFYING FTE PLACEMENT						
	BA	BA+12	BA+24	MA BA+36	MA+12 BA+48	MA+24 BA+60	MA+36 ES/DR
0							
1							
2							
3							
4							
5							
6							
7							
8							
9							
10							
11							
12							
13							
14						-	
15 or more							1.00000
TOTALS	-	-	-	-	-	-	1.00000
TOTAL FTE							1.00000

FACTORED FTE PLACEMENT

Year	FACTORED FTE PLACEMENT						
	BA	BA+12	BA+24	MA BA+36	MA+12 BA+48	MA+24 BA+60	MA+36 ES/DR
0	-	-	-	-	-	-	-
1	-	-	-	-	-	-	-
2	-	-	-	-	-	-	-
3	-	-	-	-	-	-	-
4	-	-	-	-	-	-	-
5	-	-	-	-	-	-	-
6	-	-	-	-	-	-	-
7	-	-	-	-	-	-	-
8	-	-	-	-	-	-	-
9	-	-	-	-	-	-	-
10	-	-	-	-	-	-	-
11	-	-	-	-	-	-	-
12	-	-	-	-	-	-	-
13	-	-	-	-	-	-	-
14	-	-	-	-	-	-	-
15 or more	-	-	-	-	-	-	2.01260
TOTALS	-	-	-	-	-	-	2.01260
FACTOR							2.01260
INDEX							2.01260

EXPERIENCE AND EDUCATION MULTIPLIER TABLE
INSTRUCTIONAL INDEX

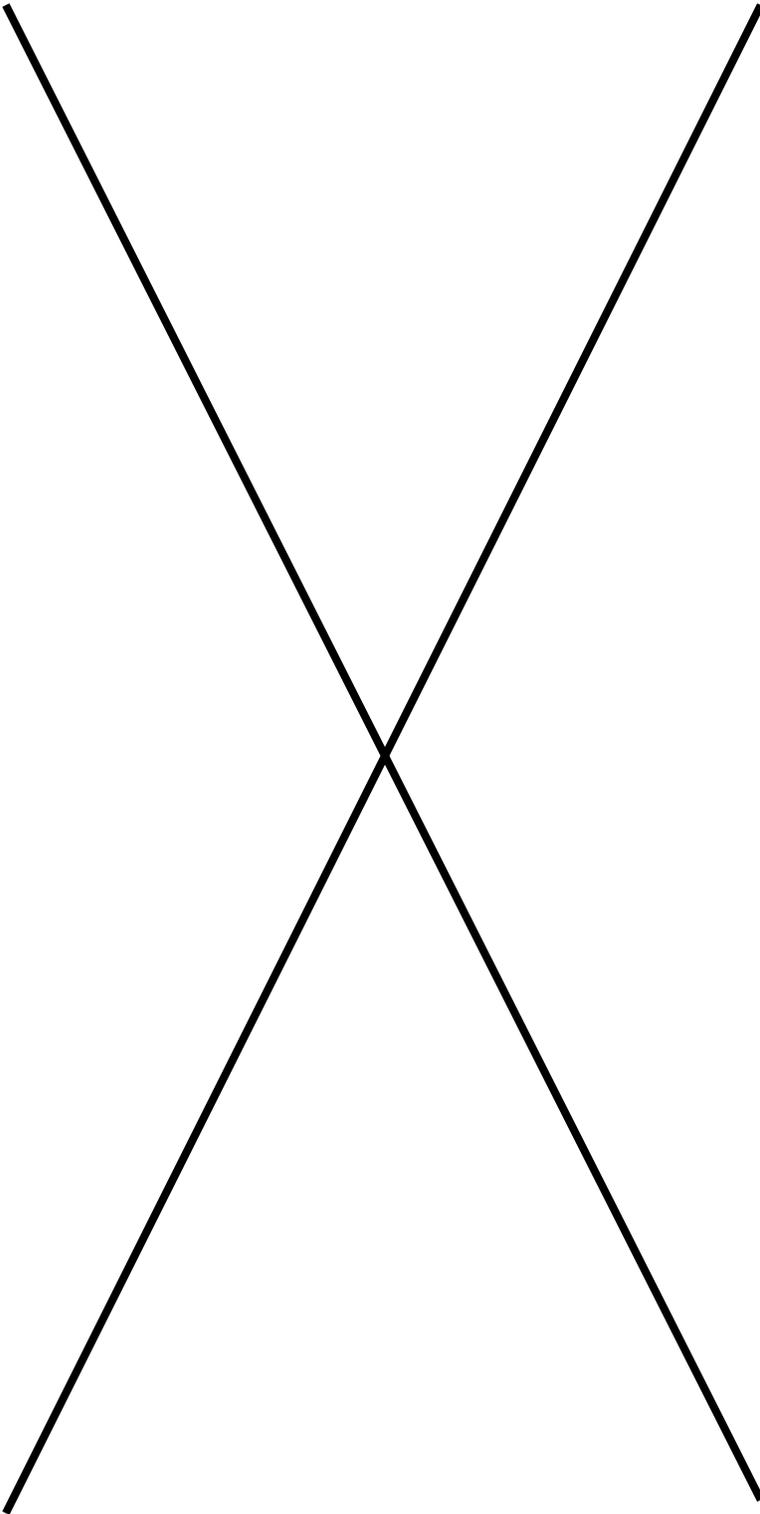
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1	1.03750	1.07640	1.11680	1.15870	1.20220	1.24730	1.29410
2	1.07640	1.11680	1.15870	1.20220	1.24730	1.29410	1.34260
3	1.11680	1.15870	1.20220	1.24730	1.29410	1.34260	1.39290
4	1.15870	1.20220	1.24730	1.29410	1.34260	1.39290	1.44510
5	1.20220	1.24730	1.29410	1.34260	1.39290	1.44510	1.49930
6	1.24730	1.29410	1.34260	1.39290	1.44510	1.49930	1.55550
7	1.29410	1.34260	1.39290	1.44510	1.49930	1.55550	1.61380
8	1.34260	1.39290	1.44510	1.49930	1.55550	1.61380	1.67430
9	1.39290	1.44510	1.49930	1.55550	1.61380	1.67430	1.73710
10	1.39290	1.49930	1.55550	1.61380	1.67430	1.73710	1.80220
11	1.39290	1.49930	1.55550	1.61380	1.73710	1.80220	1.86980
12	1.39290	1.49930	1.55550	1.61380	1.73710	1.86980	1.93990
13 or more	1.39290	1.49930	1.55550	1.61380	1.73710	1.86980	2.01260

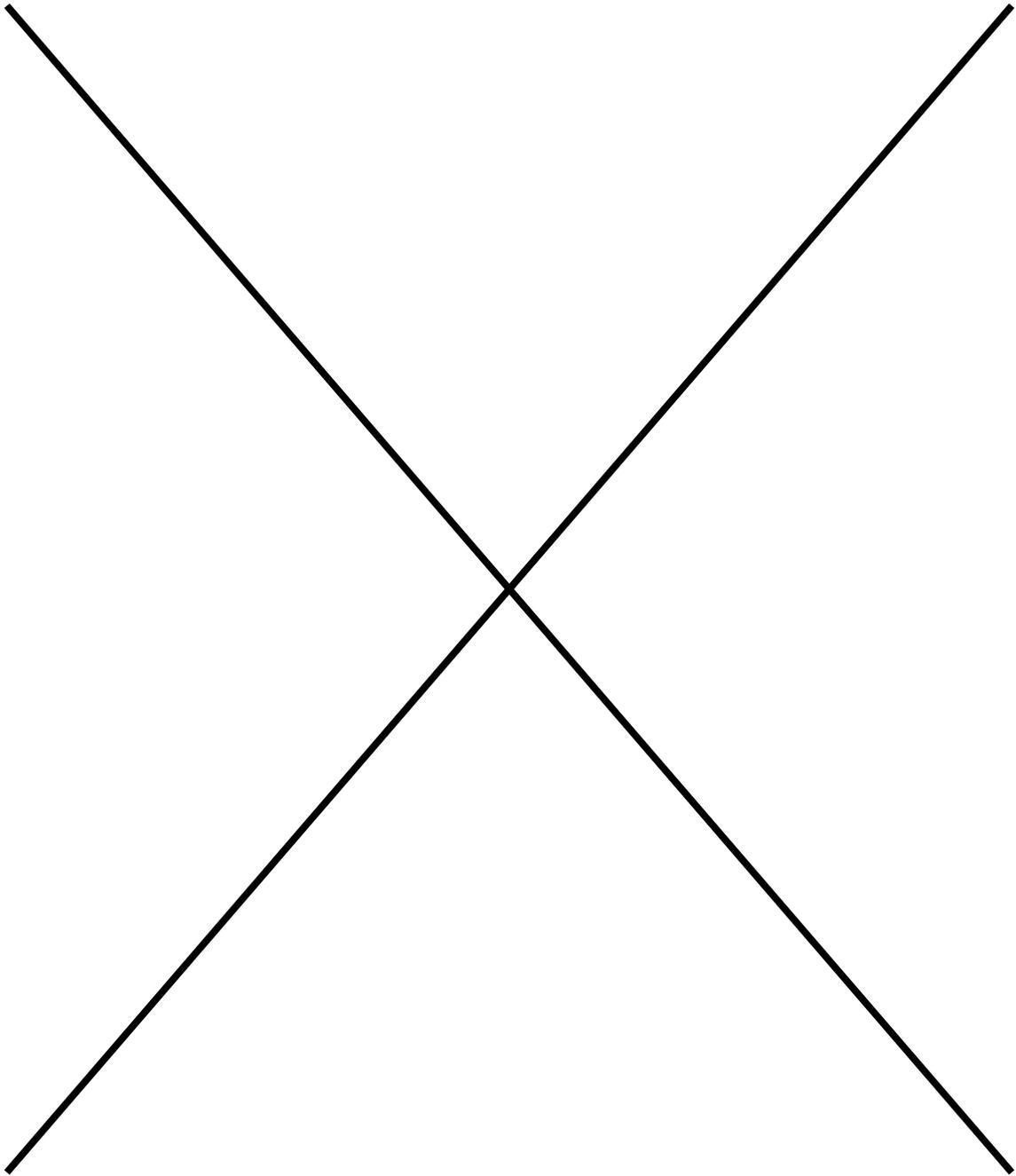
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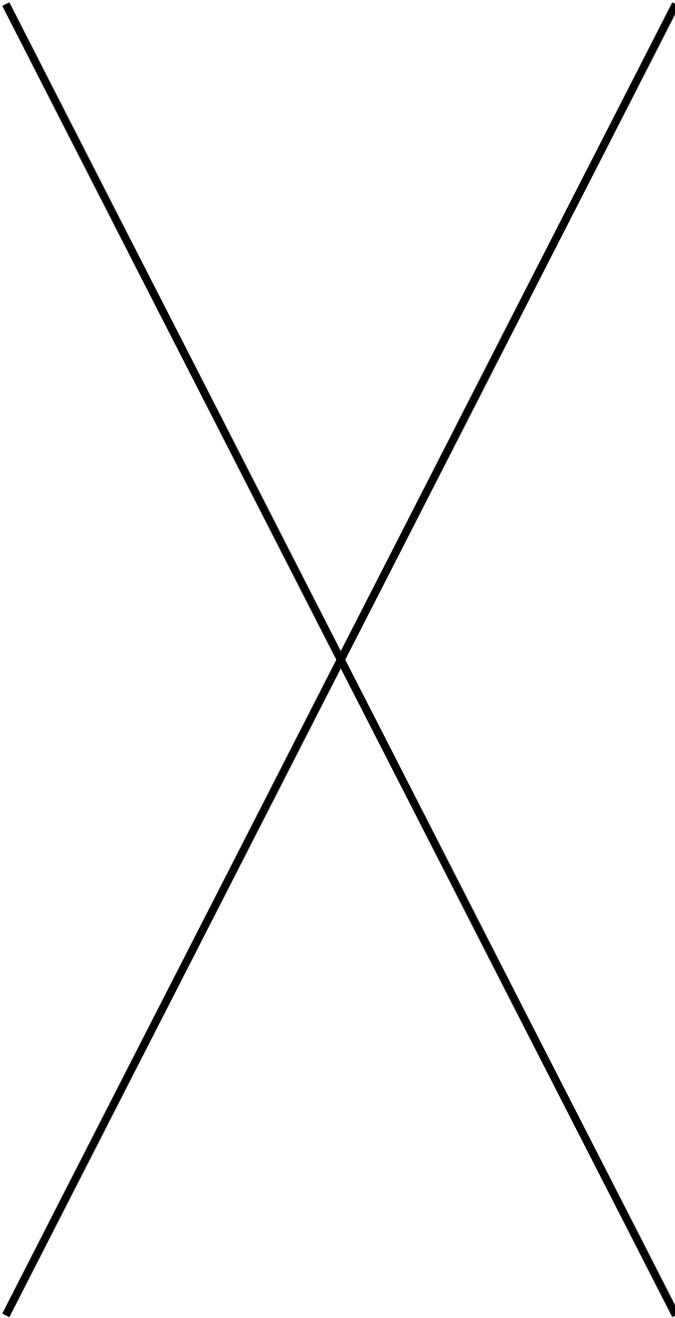
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0							
1							
2							
3							
4			-				
5				5.00000			
6							
7							
8							
9					-		
10					5.00000	-	
11							
12							
13							
14							
15 or more							
TOTALS	-	-	-	5.00000	5.00000	-	-
TOTAL							10.00000

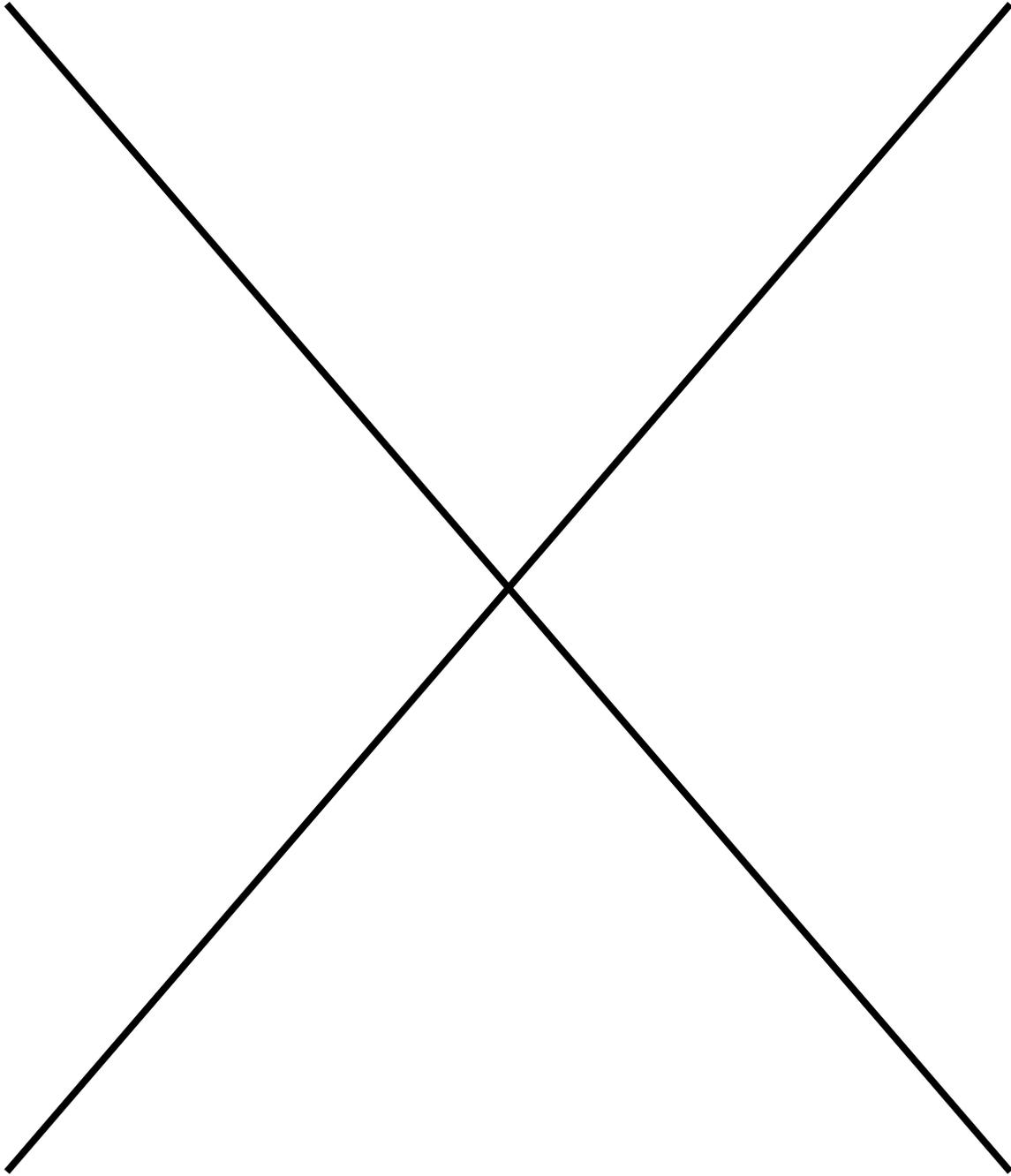
FACTORED FTE PLACEMENT

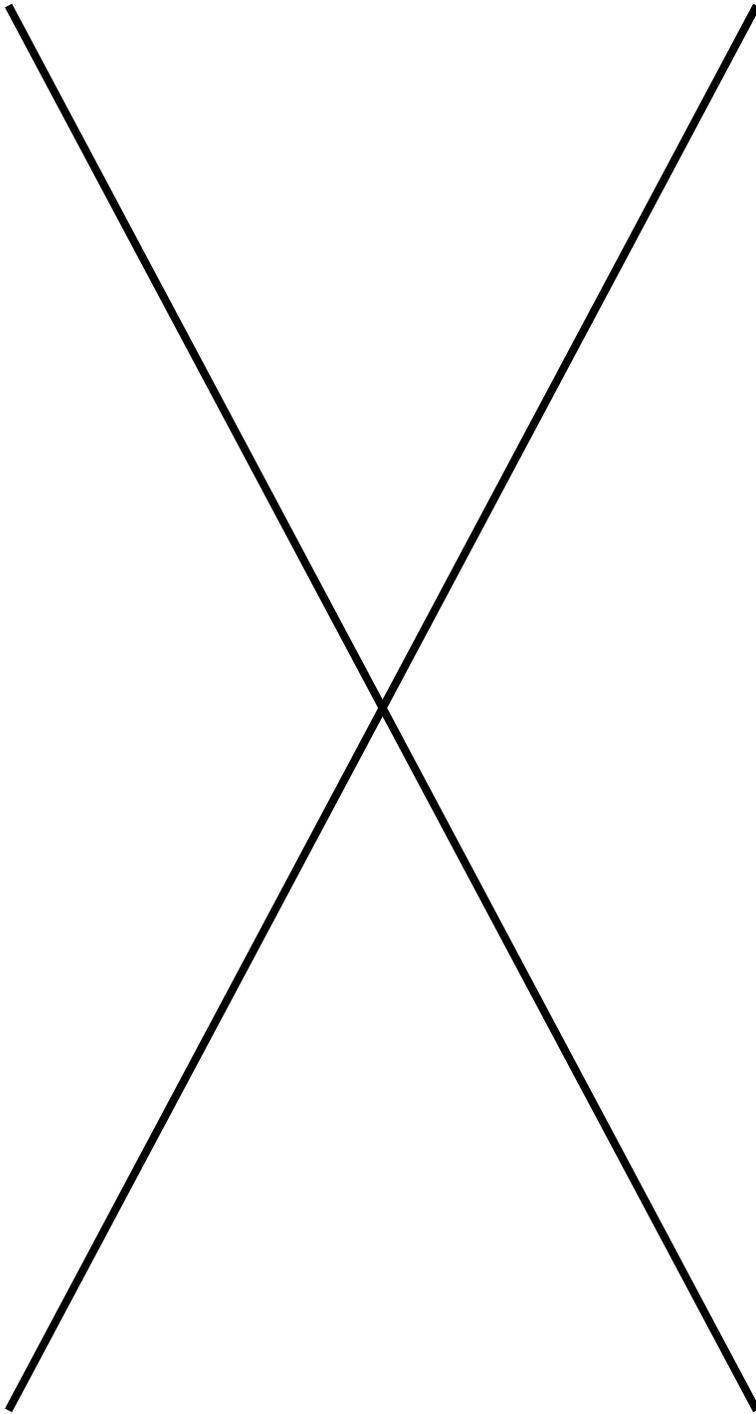
Year	BA	BA+12	BA+24	MA BA+36	MA+12 BA+48	MA+24 BA+60	MA+36 ES/DR
0	-	-	-	-	-	-	-
1	-	-	-	-	-	-	-
2	-	-	-	-	-	-	-
3	-	-	-	-	-	-	-
4	-	-	-	-	-	-	-
5	-	-	-	6.23650	-	-	-
6	-	-	-	-	-	-	-
7	-	-	-	-	-	-	-
8	-	-	-	-	-	-	-
9	-	-	-	-	-	-	-
10	-	-	-	-	7.77750	-	-
11	-	-	-	-	-	-	-
12	-	-	-	-	-	-	-
13	-	-	-	-	-	-	-
14	-	-	-	-	-	-	-
15 or more	-	-	-	-	-	-	-
TOTALS	-	-	-	6.23650	7.77750	-	-
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INDEX							1.40140

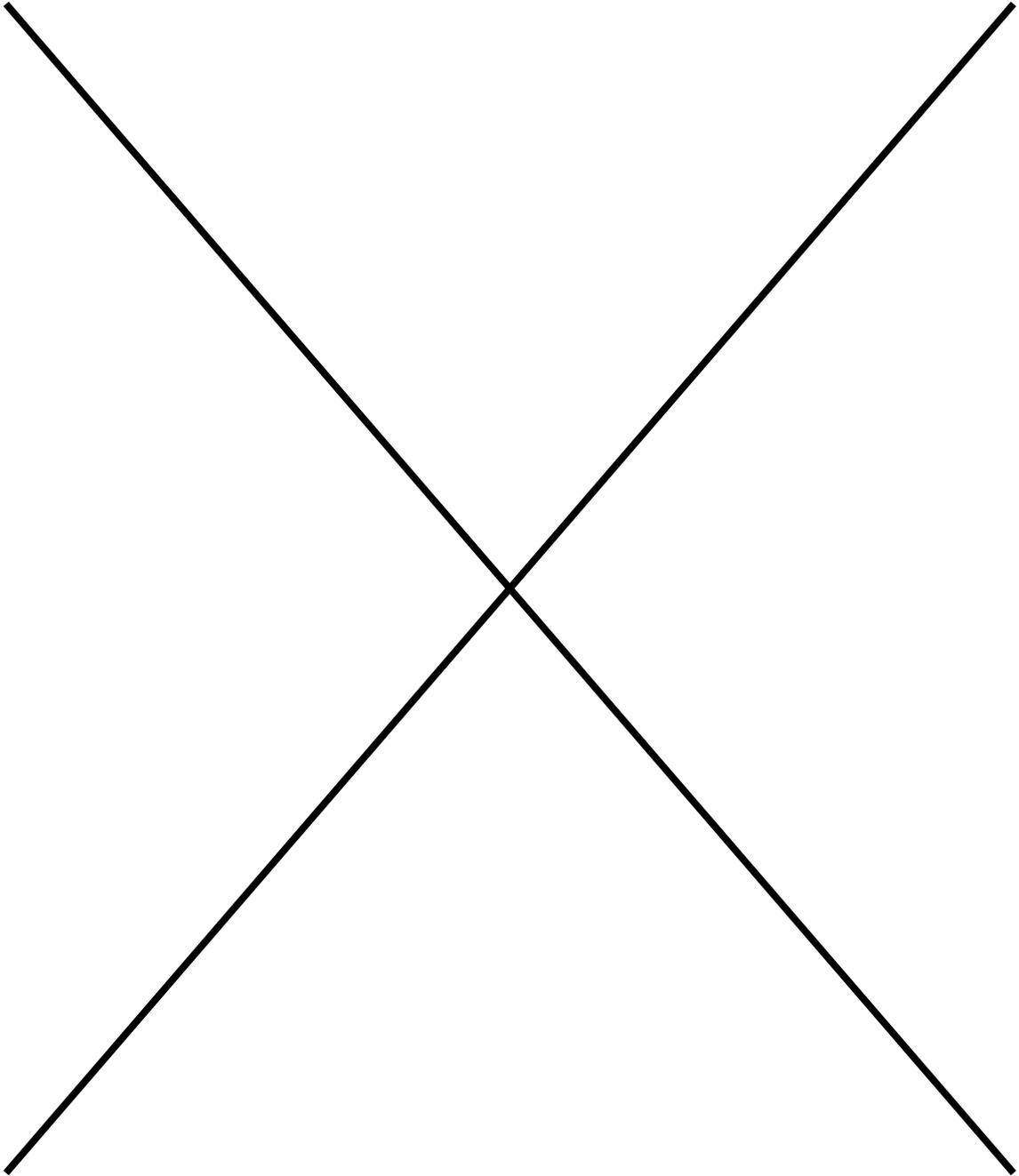












Appendix E: Board Member Resumes

Name: Kelly T. Bangerter
Address: 908 East Ave. F Jerome Idaho 83338
Phone: Home 208-324-3858 Cell 208-731-2525
Email: kelly@prudentialidahohomes.com

Statement of Intent

I believe that education is the most valuable commodity we can obtain in this life. I have worked hard in my community to improve educational opportunities for not only my children but for generations to come. I worked as a School Resources Officer for seven years where I observed firsthand the need for our children to have a safe and secure environment where they could be free to grow in their education. For six years I served as a member of my local school board and witnessed the daily struggles our public schools have with little support from the local, state and federal levels. It is my hope and belief that there is a better way and it is for this reason I have chosen to become involved in the charter school program, and in so doing I believe that I truly can make a difference in my community.

Education

- Viewmont High School located in Bountiful, Utah Class of 1981
- Weber State University located in Ogden, Utah Class of 1985 Business and Criminal Justice
- Utah Police Academy Class 173
- Idaho Police Academy Class 127

Work Experience

- Twenty years in Law Enforcement retired as Chief of Police for the City of Hazelton
- Five years as the Director of Economic Development for the Rural Magic Valley Economic Development Association
- Two years as a Realtor

Non-profit Experience

- Member of the Boy Scouts of America
- Jerome School Board member

Honors & Activities

Husband, Father, and Grandfather

Name: Scott L. Bybee, P.E.
Address: 5651 US Highway 93
Jerome, Idaho 83338
Phone: 208.308.4770
Email: sbybee@mindspring.com

Registration

Professional Civil and Structural Engineer, Idaho No. 4635, California No. 32866

Education

- B.S. Civil Engineering, University of California-Davis, 1978

Affiliations

- Past President of the Magic Valley Chapter of the Idaho Society of Professional Engineers
- National Society of Professional Engineers
- Idaho Society of Professional Engineers
- Consulting Engineers of Idaho
- Professional Engineers in Private Practice
- Pacific Northwest Water Pollution Control Federation

Work Experience

- Consulting Engineer, Bybee Engineering, Jerome, Idaho; 2000-Present
- Administrator and Engineer, Jerome Urban Renewal Agency, Jerome, Idaho; 2009-Present
- City Engineer, City of Jerome, Jerome, Idaho; 2000-2009
- Assistant Area Manager and Project Manager, JUB Engineers, Inc., Twin Falls, Idaho; 1984-2000
- Project Engineer, Edwards-Howard-Martins, Twin Falls, Idaho; 1979-1984
- Project Engineer, Sawtooth Engineering, Inc., Twin Falls, Idaho; 1978-1979

Project Experience

- As the sole proprietor of Bybee Engineering, I provide a wide range of civil and structural engineering services for small to medium sized projects in the Magic Valley area of southern Idaho.

APPENDIX E

- As City Engineer for the City of Jerome and as Administrator and Engineer for the Jerome Urban Renewal Agency, I am responsible for all aspects of administration, project management and project related funding, planning, design, inspection and closeout. Projects include all areas of municipal works, structural design and analysis, transportation, commercial buildings, land development, irrigation works and utility design.
- As Project Manager for JUB Engineers, I was responsible for project funding, planning, design, administration and closeout. I served as Consultant-City Engineer for 16 southern Idaho communities, which involved every aspect of community planning.

APPENDIX E

Name: Anneli C. Crouch
Address: 362 East 500 North, Jerome, ID 83338
Phone: (208) 324 - 1488
Email: accrouch@earthlink.net

Statement of Intent: I am dedicated to the founding of Heritage Academy Charter School in Jerome, Idaho. As a concerned parent and community member, I feel this is the best way that I can make a difference for good for our children here in Jerome, Idaho.

Education: Spring 1999 – Fall 2004 College of Southern Idaho
1993 Community College of Aurora
1992 Weber State University
1991 Brigham Young University

Work Experience: 2004 – Current Vocal Instructor

- Instruct young students in the basics of breathing, posture and technique in relation to vocal music.

Center 1998 – 2001 Doctor’s Assistant at the Jerome Eye

- Assist Doctor in procedures
- Patient instruction regarding contact lens wear and care
- Administer various ophthalmic tests
- Manage contact lens inventory

1995 – 1997 Administrative Assistant at the Salk Institute, Safety Office, La Jolla, California

Non-profit Experience: I have volunteered for 12 years in my church in various capacities involving the youth of our community in Jerome, Idaho.

Honors & Activities: I have been involved in various musical events in our community over the last 12 years. In addition, I received a Superior rating in this years’ National Federation of Music Clubs Festival, in the Art Song Category and in the Musical Theater Category.

Certificate of Participation

Anneli Crouch

attended Confratute, the Summer Institute on
Gifted Education, Enrichment Teaching and
Learning, and Differentiated Instruction, at the
University of Connecticut held
July 11-16, 2010

J. Renzulli

Joseph S. Renzulli, Professor



Sally M. Reis

Sally M. Reis, Professor

Name: Amanda Bingham
Address: 111 East 50 North
 Jerome, Idaho 83338
Phone: 208-410-5854
Email: a.bingham@live.com

Statement of Intent: As parents, I think it is important that we have a greater opportunity to be involved with our children’s education. This charter school would benefit the community by giving parents another choice and voice for their families.

Education:

2003 Idaho	<i>Bachelor Degree</i> in Elementary Education	BYU-
2001 College	<i>Associate Degree</i> in Interpersonal Communications	Ricks
1999 OR	<i>High School Diploma</i> and honors from Echo High School	Echo,

Work Experience:

2003 Idaho	Student Teaching for Bachelor Degree <i>Midway Middle School</i> <ul style="list-style-type: none"> - Taught seventh grade World History. - Responsible for lesson plans and following through with lessons. - Worked with mentor teacher. <i>Harwood Elementary</i> <ul style="list-style-type: none"> - Taught second grade students. - Responsible for assisting mentor teacher and lesson planning. - Assessed students’ knowledge of subject matter. 	Rigby,
2000-2001	Hermiston Community Center Hermiston,OR <i>Community Center Coordinator Assistant</i> <ul style="list-style-type: none"> - Set up and clean up for community events. - Routine maintenance of building and grounds. 	
1999-2001	Hydromania Summer Science Camp Hermiston,OR <i>Science Camp Counselor</i> <ul style="list-style-type: none"> - Taught fourth and fifth graders the importance of local resources. - Made numerous science experiments. - Went on several fieldtrips to educate students on the usage of water. 	

Non-profit Experience:

2004-2009 **Sunday School Teacher**

Jerome, ID

- Prepared lessons for children ranging 4-12 years old.

2000-2002 **Special Olympics**

Rexburg, ID

Upper Valley Team Assistant

- Attended weekly practices and interacted with Olympians.

Honors & Activities:

-High School Valedictorian

-High School Senior Class President

-National Honor Society

-High School Student Body

Offices 2003

2008

Idaho Educational Credentials

For all subjects K-8th grade.



Name: A. Blair Crouch

Address: 362 East 500 North; Jerome, Idaho 83338

Phone: Home 208-324-1488 Work 208-324-6644 Cell 208-280-1079

Email: blair@crossroadspoint.com

Statement of Intent

I strongly believe in a great education for individuals regardless of race, religion, and background! As individuals, we need to improve our education on a daily basis. I believe that charter schools are a step in the right direction for communities, parents, and individuals. The opportunity of choice will also help traditional schools improve and become better.

Education

- Canyon High School located in Anaheim Hills, California 1983
- Weber State University located in Ogden, Utah Class of 1992 Technical Sales and Marketing

Work Experience

- Six years in Retail Management , Franklin Covey Inc. San Diego, Ca
- Twelve years as the General Manager of several family-owned businesses including Crossroads Point, a commercial real estate development company.

Non-profit Experience

- Vice President of Fund Raising- Snake River Council, Boy Scouts of America 2008 to present
- Rotarian 2006 to present
- Co-Chairman Jerome Centennial Committee – 2004 to 2007
- LDS missionary- Independence, Missouri Mission- 1984 to 1986

Honors & Activities

- Husband
- Father
- Eagle Scout

I believe in the Heritage Academy. I have lived in Jerome, Idaho for several years. I love this community and recognize the need and opportunity for a charter school. Heritage Academy will have a positive impact in our community.

Appendix F: Draft Student Handbook

HERITAGE ACADEMY
POLICIES AND HANDBOOK

Heritage Academy

--Address--

Jerome, ID

Telephone: (208)

Fax: (208)

E-mail:

Website:

INTRODUCTION

Vision Statement

The vision of Heritage Academy is to maintain, enhance, and further students' love of learning by providing an enriched curriculum that grows with the student. We believe that supplying a safe and respectful environment that encourages innovative teaching methods will foster students to become lifelong learners. The Founders of Heritage Academy believe that students thrive when provided with rich opportunities to engage in an inductive learning environment designed to allow them to expand on their strengths and interests.

Mission Statement

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.

APPENDIX F

PRINCIPAL'S MESSAGE

Dear Parents and Students:

Welcome to the 2011-2012 school year. I am excited for the many opportunities your student(s) will have this year. Please take time to sit down with your student to familiarize yourselves with Heritage Academy's policies; with particular attention given to the Attendance Policy, and Student Appearance Policy.

The teachers, staff and I are dedicated to making this school one where students are growing and maturing both academically and socially. We will provide a safe and effective learning atmosphere for our students.

If you ever have a question, comment or concern, please do not hesitate to contact the school office.

Looking forward to a great year,

Principal

PRINCIPAL AND GOVERNING BOARD

Chairman, Governing Board:

Governing Board Member:

Governing Board Member:

Governing Board Member:

Governing Board Member:

Clerk of the Board:

Principal:

FACULTY - List

Kindergarten:

1st Grade:

1st Grade:

2nd Grade:

2nd Grade:

3rd Grade:

3rd Grade:

4th Grade:

4th Grade:

5th Grade:

6th Grade:

Computer:

Science:

P.E.:

Music:

Special Ed.:

Special Ed:

Office:

APPENDIX F

ATTENDANCE AND TRUANCY POLICY

At Heritage Academy regular attendance and punctuality are a vital part of a student’s education. Teachers implement a high level of direct teaching and interactive learning. Both students and teachers are held accountable to complete a set of standards and benchmarks and as a result, regular attendance is critical to each student’s success. Heritage Academy has a 96% attendance standard. Every effort and commitment should be made by students, parents and administration to ensure that students are in attendance and punctual every day. A year-round school calendar is provided well in advance to allow families to schedule activities during breaks. Students are expected to attend classes regularly.

TARDY POLICY

All students arriving more than 5 minutes late must report to the office to ensure accurate records and lunch counts. Students arriving more than 5 minutes late need an adult to sign them in at the office. Students leaving and returning during the school day must be signed in and out by an adult.

Each time a student is tardy three (3) times in 1 semester, the student will also be treated as having 1 unexcused absence.

ABSENCE POLICY

Excused absences – The Administration and Governing Board recognize that there are special circumstances when a student may need to participate in another event or activity rather than attend class. An absence will be considered “excused” if the student could not attend class because he/she is ill, or is attending a funeral or wedding of an immediate family member, and the student’s parent/guardian provides reasonable evidence that this was the cause of the absence. However, the cumulative affect of regular class attendance is critical to the learning experience that Heritage Academy offers, which the student misses even when the absence is excused.

Unexcused absences – absences due to non-school related activities, club or family events, trips or vacations, and any absences not reported to the school by a parent/guardian within two school days of the student’s return to school.

Grades 1-6

Number of Absences per semester Sanction

5 unexcused absences	The grade the student would otherwise receive is reduced by one full letter grade.
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APPENDIX F

10 unexcused absences	The student will lose his seat in the school.
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EXPULSION

A student will be expelled only after the Heritage Governing Board has given written notice to the parent/guardian of the student, stating the grounds for the proposed expulsion, and specifying a time and place where the parent/guardian of the student may appear to contest the proposed action of the Board. This notice shall also state that the student has the right to be represented by counsel, to produce witnesses, and to submit evidence on his/her behalf, and to cross examine any adult witnesses who may appear against him/her. The Governing Board for Heritage Academy will regularly review and adopt policies describing sanctions, including the expulsion of the student, that would be appropriate unless there are extraordinary circumstances.

TRUANCY

Truancy is defined as a student being absent for all or any part of the school day, without the approval of the parent, guardian or school authorities. This includes students who are on the campus, but not in their assigned classroom. Truancies accrue for the entire year.

ABSENCE VERIFICATION

When a student has not arrived by 9:00 a.m., and no contact from a parent has been received, a school representative will attempt to contact parent/guardian. To have an absence excused, a parent/guardian must call or send a signed note stating the reason for the absence upon the student's return to school. A doctor's note is recommended for extended absences due to medical reasons. Three (3) or more consecutive absences may require a note from a physician. If appropriate notification has not been received within 2 days of student's return to school, the absence may be considered an unexcused absence. Parents whose work schedule prevents them from contacting the school during the normal school hours are strongly urged to send a note or leave a message after hours.

DISCIPLINE POLICY

Students are expected to be respectful and kind to fellow students, staff and visitors at all times, exhibit good work skills, and use appropriate language. Students are expected to follow school rules and policies throughout the school day, at all times on the Heritage Academy campus and while involved in any event associated with the school. School rules and policies apply to transportation to and from events as well. When students commit an infraction, the faculty member(s) involved will complete an Incident Report. Incident Reports will be kept with administration. The administrator will determine appropriate consequences for each incident.

APPENDIX F

Students with 3 or more Incident Reports may be required to appear before a Board of Review made up of staff members to develop a behavior plan. Non-compliance with the behavior plan may result in an appearance before a Board of Review made up of parents, staff and community members. The purpose of this board is to assist the student in developing a plan that will remedy the situation. Further non-compliance will result in the student appearing before the Heritage Governing Board for possible suspension or expulsion based on recommendation by the previous Review Boards.

STUDENT APPEARANCE

In an effort to maintain a safe and orderly school environment for students, the following dress guidelines have been established. It is the opinion of the administration and the governing board that student attire has a direct effect upon the educational environment and upon the individual student's ability to function at an optimum level.

Appropriate clothing for class or any school activity must be reasonable, safe, clean, and non-revealing. An individual's dress and personal appearance should reflect a sensitivity and respect for others as well as what would be considered appropriate in a casual-professional work environment. Therefore, the following guidelines are to be followed by students of Heritage Academy:

Pants are to be worn at the waist.

Shorts and skirts must reach the end of the middle finger of the extended arm.

Shorts may only be worn before the October Break and after the Spring Break.

Students must have tennis shoes for physical education and extracurricular sports.

Students may NOT wear makeup at Heritage Academy. However, blemish corrector and CLEAR lip gloss are allowed.

Straps on shirts must be a minimum of 3 fingers wide. (no "muscle man" shirts)

Midriffs, cleavage and underclothing will be concealed at all times.

Students will refrain from wearing gang attire of any kind, or attire that appears to promote gang activity. Garments that advertise inappropriate or illegal substances or clothing items with suggestive or obscene statements are prohibited.

Hats, bandanas, stocking caps and hairnets are prohibited.

Hair color will be within the natural hair color spectrum (brown, black, blonde or auburn).

No facial rings of any kind will be allowed.

APPENDIX F

Earrings are acceptable with the exception of ear gauges. EAR GAUGES ARE NOT ACCEPTABLE.

Tattoos must be concealed during school hours.

Students wearing attire deemed inappropriate by staff or Administrator will be provided alternative clothing to cover up. This clothing must be laundered and returned to the school the following day.

Required dress for student participation in activities that are in any way representative of the individual school or community shall be outlined by the respective sponsor and administration.

WEAPONS POLICY

Absolutely no weapons of any sort or anything that resembles a weapon as defined in 18 U.S.C. Section 930 are allowed on Heritage Academy property or at school sponsored activities at any time under any circumstances. Any student who brings a weapon to school property and/or school sponsored activities is in violation of the Gun-Free Schools Act and Idaho Code 18-3302D, and shall be expelled for a period of no less than 1 year (12 months). A recommendation will be made to the Governing Board for extended suspension or expulsion.

WEAPONS POLICY EXPLAINED

I. Purpose

The purpose of this policy is to ensure a safe school environment for students, staff and the public.

II. Statement

No student shall possess, use, or distribute a weapon when in a school location.

III. Definitions

Weapon

Any object, device or instrument designed as a weapon or through its use is capable of threatening or producing bodily harm or which may be used to inflict self-injury including, but not limited to, any firearm, whether loaded or unloaded; air guns, pellet guns; BB guns, all knives, blades, clubs, metal knuckles, numb chucks, throwing stars, explosives, fireworks, mace

APPENDIX F

and other propellants, cigarette lighters, stun guns, ammunition, poisons, chains, bows, arrows, laser pointers, and objects that have been modified to serve as weapons.

No student shall possess, use or distribute any object, device or instrument having the appearance of a weapon and such objects, devices or instruments shall be treated as weapons, including, but not limited to, weapons listed above which are broken or non-functional, look alike, toy guns, and any object that is a facsimile of a real weapon.

No student shall use articles designed for other purposes (i.e.: belts, combs, pens, pencils, files, scissors, tacks, etc.) to inflict bodily harm and/or intimidate and such use will be treated as the possession and use of a weapon.

School Location

School location includes a school building, school grounds, school activities or trips, bus stops, school buses or school vehicles, school-contracted vehicles, the area of entrance or departure from school premises or events, and all school-related functions.

Possession

Possession means having a weapon on one's person or in an area subject to one's control in a school location. A student who finds a weapon on the way to school or in the school building, or a student who discovers that he/she accidentally has a weapon in his/her possession, and takes the weapon immediately to the principal's office shall not be considered to possess a weapon.

IV. Consequences

The school district takes a position of addressing each case individually

in regard to the possession, use or distribution of weapons by students. The minimum consequence for student's possession, use or distribution of weapons will include:

Confiscation of the weapon

Notification of Police

Notification of parents/guardians

Suspension

Hearing with the Governing Board

V. Application to Instructional Equipment/Tools

APPENDIX F

While the school district and the school wish to address each case individually, it takes a firm position on the possession, use or distribution of weapons by students. Such a position is not meant to interfere with instruction or the use of appropriate equipment and tools by students. Such equipment and tools, when properly possessed, used and stored, shall not be considered in violation. However, when authorized instructional and work equipment and tools are used in a potentially dangerous or threatening manner, such possession and use will be treated as the possession and use of a weapon.

VI. Administrative Discretion

The superintendent may use discretion in determining whether, under the circumstances, a course of action other than the minimum consequences specified above is warranted. If so, other appropriate action may be taken, including consideration of a recommendation for lesser discipline.

FIGHTING (BATTERY)

Heritage Academy is committed to providing students with a safe environment. Fighting will not be tolerated on school grounds or at school functions. A fight is described as follows: Pushing, shoving, kicking, pulling or physically connecting in an aggressive manner with another student. Parents will be notified of any fight (battery). The consequences for a fight are as follows.

1st Fight (Battery):

Parents will be notified by phone.

Loss of recess and P.E. for 5 school days.

Loss of field trip privileges: K, 1, 2, 3 – One field trip. Grades 4, 5, and 6, loss of all remaining field trips for the school year.

If deemed necessary, the authorities (police) will be notified.

2nd Fight (Battery):

Parents will be notified by phone.

Grades K, 1, 2, and 3 – loss of all remaining field trips for the school year.

The Heritage Academy Board will be notified and may require a meeting with the student and parents.

Authorities (police) will be notified.

Three day suspension

3rd Fight (Battery):

Parents will be notified by phone.

Authorities (police) will be notified.

The Heritage Academy Board will be notified and will conduct a hearing with the student and parents. to determine whether student will be expelled or serve suspension.

A student who has been identified in a fight may participate in an off campus activity is if he/she is transported to and from the field trip location(s) by a parent and is supervised by the parent for the duration of the field trip. The student's safety is the responsibility of his/her parents.

LANGUAGE

Students will refrain from swearing or using foul language at all times. Students will speak kindly and respectfully to staff and fellow students. Students speaking inappropriately, disrespectfully or unkindly will be assigned detention and an incident report will be completed. Repeated incidences may require an appearance before the Board of Review as stated in the Discipline Policy.

DRUG POLICY

Heritage Academy adheres to the policies as described in the Safe & Drug Free Schools Act as described by the Idaho State Dept. of Education and enforces a "no tolerance" drug policy. All incidences or suspected incidences of possession or distribution of controlled substances, over-the-counter, or prescription medication will be reported to the appropriate law enforcement agency. Disciplinary consequences at school will be developed on a case-by-case basis. Any student requiring over-the-counter or prescription medication must leave it with the secretary in the office as described on page 10 under Administering Medication. If there is probable cause that a student is in possession of drugs, all property is subject to be searched including lockers.

ACADEMIC INTEGRITY/PLAGARISM, CHEATING

Heritage Academy considers cheating or academic dishonesty to be a serious violation of school rules and has adopted procedures (below) to deal with students who have committed any of the following:

Receive or provide information during a test.

Receive or provide information on tests during an earlier period.

Use unauthorized material on tests.

APPENDIX F

Use ideas or written material from other sources, i.e., students, professional writers, Internet notes, study guides without acknowledging the source in their own writing.

Use or copy another student's homework when not authorized by the teacher to do so.

Allow other students to use their work on assignments.

First Offense – Student is given a zero on the compromised work. Parents will be notified.

Second Offense – Student will receive a zero and will be referred to administration for further disciplinary action including the possibility of suspension or expulsion.

HOMEWORK POLICY

The education of today's youth must be considered a team effort involving parents, students and teachers. Research shows that the most successful students, regardless of family income or ethnic background are those who have regularly structured homework time. Homework allows additional practice and reflection, reinforces skills, and provides practical application and time for additional research. Homework helps establish a basis for independent and life-long learning while the discipline of nightly homework creates a habit that will be beneficial throughout life.

Homework assignments are required and will apply to the student's grade.

Late assignments will be awarded a lower grade.

Benchmark assignments must be completed to receive credit.

Assignments more than one day late may or may not be accepted at the teacher's discretion.

Homework due during an unexcused absence will receive a failing grade at the teacher's discretion.

(Teachers will establish specific policies for their classes and will share those with their students.)

It is not our intention that parents teach their students; however, parental support and encouragement are essential for many students to be successful. The following have proven beneficial to both parents and students:

Establish with your student that homework is a priority.

Establish a regular homework schedule.

APPENDIX F

Discuss, read and review assignments periodically.

Listen to rehearsals of presentations.

Review and discuss grades on completed assignments.

MORNING AND AFTER SCHOOL SUPERVISION

Heritage Academy will not provide supervision on school grounds for students in grades K through 6 before 7:50 a.m. or after 3:00 p.m. Therefore, students should arrive after 7:50 a.m. and be picked up prior to 3:00 p.m. Parents are expected to make appropriate arrangements to ensure the safety of their children.

GENERAL INFORMATION

ADMINISTERING MEDICATION

Students are not permitted to carry prescription or non-prescription medications at any time. If a student must take medication during the school day, these guidelines will be followed:

1. All medications will be left with the secretary.
2. The parent/guardian must submit a written request to the school if the medication is to be given during school hours. Specific directions for administering the medication and the parent/guardian's signature must be received before any medication is given to the student. In the case of prescription medications, the physician's signature is also required.
3. The medication must be in the original container and the student's name and directions for administering the medication must be written on the container.
4. It is the student's responsibility to come to the secretary at the appropriate time to take his/her medication, unless the student has a disability and is unable to do so.
5. Non-prescription medication, such as Tylenol, Ibuprofen, Cough drops and Anti-itch cream, can be provided to students with parental permission. A parent note can be on file to allow the medication to be provided as needed to the student or by parent signature on the enrollment form.

COMPUTER, INTERNET & E-MAIL USE

Computer usage is allowed for school-related, educational or assignment-based use only. Students may not use computers to play computer games, visit chat rooms, instant message or use social networking tools such as twitter, *myspace.com* or *facebook.com* at any time. E-mail

APPENDIX F

access is allowed with specific instructor permission only. E-mail access for non-school related reasons is not allowed at any time. Student and parent/guardian will review and sign computer/internet guidelines at the time of registration. Computer usage is frequently monitored. Computer use at Heritage Academy is a privilege and not a right. Abuse of the computer will result in restriction of use.

HEADPHONES / MP3 PLAYERS

Students are not allowed to wear headphones or listen to MP3 players *at any time (except when identified as an accommodation on a student's IEP)*. Headphones or MP3 players seen at school will be taken until after school. Students who consistently abuse this policy will have their headphones/MP3 player taken away and the confiscated item will only be returned to the parents or guardian.

CELL PHONES

Students are not allowed to use cell phones during school hours. Cell phones that are out during school hours will be taken.

1. First infraction – phone taken for the day.

Second infraction – phone turned in to the Administrator at the beginning of the school day and returned to student at the end of the school day for one month.

Third infraction – meeting with parents and cell phone possession is restricted on school property.

ATHLETICS

Student athletes must maintain a minimum grade of a “C” in every class, and meet all requirements on the Sports Eligibility Form to be eligible to participate in any sport/athletic event. Students will be required to have a Sports Eligibility Form signed by all teachers each week while participating in sports. Athletes with discipline write-ups will not be allowed to play for a period determined by the Administrator.

SPORTS DUAL ENROLLMENT (with the Jerome School District)

Heritage Academy will refer students to the Jerome School District, or other appropriate public school district for dual enrollment for extracurricular sports for students..

Jerome School District students have priority when cuts are made.

APPENDIX F

Heritage Public students are responsible for fees that are set by the appropriate school district for non-school district.

SCHOOL-SPONSORED TRIPS

All school-sponsored out-of-town trips taken for the purpose of participation in any educational endeavor shall be chaperoned by a member of the teaching or administrative staff. A student, who is not an active participant in the event, but has a reasonable purpose for attending may accompany the group with advance approval by the administrator. Organizations that plan to attend out-of-town events when it is necessary to leave during the school hours must receive written administrative approval. Any educational trips, which are not sponsored by the school, must have prior written approval from the Administrator for the absence to be excused.

Students participating in school activities where buses are used for transportation may not go or return by private means without administrator approval. All baggage and personal effects may be opened and searched by school personnel before or during the trip.

GYMNASIUM

Use of the gymnasium and equipment outside of regular school hours must be supervised by an adult and approved by the Administrator. Use of the gymnasium during lunchtime is prohibited, unless approved by the Administrator.

SCHOOL EQUIPMENT

All school equipment is off limits during non-class hours unless instructor gives prior written permission.

CAMPUS VISITS

Heritage Academy visitors are required to check in at the front office concerning their business. Students who wish to bring visitors and guest speakers to the school should proceed through the appropriate teacher and get permission of the administrator or designee at least one week prior to the visit. Parents that wish to speak with students during school hours are asked to proceed through the school secretary. Parents that need to speak with teachers are asked to set an appointment in advance. Parents of students may volunteer in the classroom, but are asked to respect classroom procedures and speak with student or teachers outside of class time.

SCHOOL LUNCH PROGRAM

Heritage Academy will provide a variety of wholesome lunches to their students beginning as soon as it becomes feasible. Lunch prices will be set annually. Reduced/Free lunches will be available. Applications are included in family enrollment packets. Lunch fees will be collected

APPENDIX F

daily during morning attendance or may be paid directly to lunchroom staff. Parents are encouraged to maintain a balance on their students' accounts.

EMERGENCY SCHOOL CLOSURES / SNOW DAYS

In the event of heavy snowfall or freezing rain, which makes road conditions unsafe for school buses to operate, the following procedures will be followed:

The Administrator will notify radio stations and TV stations of any school closure or late start. The stations typically begin announcing closure information at approximately 6:15 a.m. On late start days, all buses can run up to 60-90 minutes late.

WITHDRAWAL PROCEDURES

Any student leaving Heritage Academy for any reason during the school year should do the following:

1. Provide a written request, including the date of withdrawal, from the parent/guardian to the secretary stating that the student is withdrawing from school and the reason for withdrawal.

Withdrawal grades will be available within 3 school days following the exit interview.

SCHOOL INSURANCE

Heritage Academy is not responsible for accidents involving students while attending school, or school-sponsored extra-curricular activities. Students are covered when they ride the school buses. Students are protected while traveling on chartered buses or regularly-scheduled common carriers by the liability of those carriers. Heritage Academy does not assume any financial responsibility for medical or hospital expense incurred because of athletic injuries. Athletics are voluntary programs in which the student may participate if he/she so desires; but he/she does so at his/her risk of injury.

REPORT CARDS

Students will receive a formal copy of quarter, and semester grade reports. Parents are encouraged to attend Parent/Teacher Conferences at the end of 1st and 3rd quarters to pick up Progress Reports and meet with teachers about their student's progress and participation. Semester report cards will be sent home with students or mailed to parents. Weekly or monthly progress notes will be sent home with students if teachers or parents feel it is necessary. Parents will be notified a minimum of 2 weeks prior to grade reports if a student is failing a class.

Bullying & Harassment Policy

It is the policy of Heritage Academy to maintain a learning environment that is free from bullying and harassment. Each student has the right to attend school in an atmosphere that promotes equal opportunities and that is free from all forms of discrimination and conduct that can be considered harassing, coercive or disruptive. Students attending Heritage Academy are:

1. Prohibited from engaging in any conduct which could reasonably be construed as constituting harassment on the basis of sex, race, color, national origin, age, religious beliefs, ethnic background or disability;
2. Prohibited from sexually harassing other students; and
3. Required to report to the school principal or designee, harassment of which the student becomes aware. This policy applies to all conduct on the school's premises and at school-sponsored events, conduct during transportation to and from school and school-sponsored events, and to conduct off the school's premises that has an adverse affect upon a student's educational environment.

What is "harassment"? Harassment includes verbal, written, graphic or physical conduct relating to an individual's sex, race, color, national origin, age, religious beliefs, ethnic background or disability that is sufficiently severe, pervasive, or persistent so as to interfere with or limit the ability of an individual to participate in or benefit from the school's programs that:

1. Has the purpose or effect of creating an intimidating or hostile environment.
2. Unreasonably interferes with an individual's educational performance.
3. Otherwise adversely affects an individual's educational opportunities.

Examples of harassment include but are not limited to:

1. Physical acts of aggression or assault, damage to property, or intimidation and implied or overt threats of violence motivated by victim's sex, race, color, national origin, age, religious beliefs, ethnic background or disability;
2. Demeaning racial jokes, taunting, slurs and derogatory "nicknames," innuendos, or other negative remarks relating to the victim's sex, race, color, national origin, age, religious beliefs, ethnic background or disability;
3. Graffiti and/or slogans or visual displays such as cartoons or posters depicting slurs or derogatory sentiments related to the victim's sex, race, color, national origin, age, religious beliefs, ethnic background or disability; and
4. Criminal offenses directed at persons because of their sex, race, color, national origin, age, religious beliefs, ethnic background or disability; Harassment also includes an act of retaliation taken against (1) any person bringing a complaint

of harassment, (2) any person assisting another person in bringing a complaint of harassment, or (3) any person participating in an investigation of an act of harassment.

What is Sexual Harassment? Sexual harassment is a form of misconduct that undermines the student's relationship with educators and with other students. No student, male or female, should be subject to unasked for and unwelcome sexual overtures or conduct, either verbal or physical. Sexual harassment refers to sexual overtures or conduct that is unwelcome, personally offensive, and affecting morale, thereby interfering with a student's ability to study or participate in school activities. Sexual harassment is a form of misconduct that includes unwelcome sexual advances, requests for sexual favors, sexually motivated physical conduct or other verbal or physical conduct of a sexual nature when:

1. Submission to such conduct is made either explicitly or implicitly a term or condition of an individual's participation in the educational process;
2. Submission to or rejection of such conduct by an individual is used as a factor for educational decisions affecting the individual; or
3. Such conduct has the purpose or effect of unreasonably interfering with an individual's education, or creating an intimidating, hostile or offensive educational environment.

Examples of sexual harassment include, but are not limited to, the following examples: unwelcome verbal statements of a sexual or abusive nature, including requests or demands for sexual activity, sexual jokes, and obscene comments, etc.; unwelcome, sexually motivated or inappropriate touching, pinching, or other physical contact; unwelcome sexual behavior or communications, accompanied by implied or overt threats concerning an individual's education; unwelcome behavior or communications directed at an individual because of his/her gender; and Stalking or unwelcome, sexually motivated attention.

Reporting Procedures

1. Any student, and/or parents of a student, who believes the student is being harassed should immediately report the situation to school personnel.
2. Any school employee who receives a report of harassment from a student, becomes aware that a student is being subjected to harassment, or in good faith believes that a student is being subjected to harassment, is required to report the matter to the principal immediately. In the event the complaint involves the principal, the matter must be immediately reported to any member of the Board of Directors.
3. Any school employee who witnesses harassment of a student should take immediate, appropriate action to intervene to stop the harassment.

4. Any student who becomes aware that a fellow student is being subjected to harassment should immediately report the incident to a counselor, teacher, or the principal.

What is "Bullying." Bullying can be described as repeated exposure over time to negative actions on the part of one or more students. When someone keeps doing or saying things to have power over another person. Bullying is characterized by: (i) aggressive behavior, or intentional harm-doing; (ii) carried out repeatedly and over time; (iii) the existence of an imbalance of power; and (iv) bullying often occurs without apparent provocation.

Bullying takes three forms:

1. Direct Bullying (Physical) - Hitting, kicking, pushing, choking; taking belongings;

2. Verbal Bullying - Name calling, threatening, taunting, malicious teasing, making faces, obscene gestures;

3. Indirect Bullying - spreading nasty rumors, writing anonymous notes, intentional exclusion from groups.

Investigation. When a report of harassment or bullying is received by the principal, immediate steps will be taken to do the following:

1. Obtain a written statement from the complainant regarding the allegations;

2. Obtain a written statement from the accused;

3. Obtain written statements from witnesses, if any; and

4. Prepare a written report detailing the investigation.

Someone may be appointed to investigate the conduct, or the principal or board member may conduct an investigation. The investigation should be completed within ten (10) workdays.

Disciplinary Action. If the allegation of harassment or bullying involves a teacher or other school employee, the principal will submit the report of the investigation to the chairman of the Board of Directors. If there is sufficient evidence to support the allegations, disciplinary action, up to and including dismissal, may be taken against the offender.

If the allegation of harassment or bullying is against a student and there is sufficient evidence to support the allegations, disciplinary action, up to and including expulsion, may be taken against the offender. If there is insufficient evidence to support the allegations, no record will be made of the allegations in the complaining student's permanent record.

No record of the allegations will be placed in the accused employee's personnel record or in an accused student's expulsion.

In the event the harassment involves violent or other conduct which could be reasonably considered to be criminal in nature, the principal/superintendent will refer the matter to the local law enforcement agency.

Protection Against Retaliation. No retaliation will be taken by this district or by any of its employees or students against a student who reports harassment in good faith. Any person found to have retaliated against another individual for reporting an incident of harassment may be subject to the same disciplinary action provided for harassment offenders. Those persons who assist or participate in an investigation of harassment are also protected from retaliation under this policy.

Confidentiality. Any investigation will be conducted, to the maximum extent possible, in a manner that protects the privacy of both the complainant and the accused. However, if it is suspected that child abuse has occurred, such abuse will be reported to the proper authorities as required by state law.

Record of Allegations. The school will keep and maintain a written record, including, but not limited, to witness statements, investigative reports and correspondence, from the date any allegation of harassment is reported to Heritage Academy personnel. The information in the written record will also include the action taken by the Academy in response to each allegation. The written record will be kept in the school's administrative offices and will not, at any time, be purged by school personnel. permanent record if insufficient evidence supports the allegations. In the event the investigation discloses that the complaining student has falsely accused another individual of harassment knowingly or in a malicious manner, the complaining student may be subject to disciplinary action, up to and including

Appendix G: Letter from North Side Bus Company, Inc.

NORTH SIDE BUS COMPANY, INC.

SAFE, DEPENDABLE TRANSPORTATION SINCE 1970

July 27, 2009

To: Anneli Crouch

Subject: Transportation for Crossroads Charter School

Thank you for your call today, it was a pleasure to speak with you.

North Side Bus Company has been in the student transportation business for over 40 years. We currently contract to Jerome and Hagerman school districts and we are interested in considering supplying your student transportation needs. Please send the bid specifications as soon as you have them draw up.

Thank You!

Tim Young



Operations Manager
North Side Bus, Co. Inc.
Jerome, ID.

Web Address: www.northsidebusco.com

Email Address: youngt@qwestoffice.net

Cell: 208-316-0036

Appendix H: Idaho Department of Education Sufficiency Review

Sufficiency Review by the Idaho Department of Education Elements Required of a Petition to Establish a Charter School

Pursuant to the public charter school rules adopted by the Idaho State Board of Education on March 10, 2005, charter school petitioners are required to submit a draft charter school petition to the Idaho State Department of Education (SDE) for the purpose of determining whether the petition complies with statutory requirements (Idaho Code, Title 33, Chapter 52). This review must occur prior to the petition being submitted to an authorized chartering entity (IDAPA 08.02.04. 200.03).

Charter School Name: Heritage Academy

Attendance District: Jerome

Date submitted to State Department: October 6, 2009

Date of Review: November 5, 2009

Each section presents criteria for a response that meets the standard, and these criteria should guide the overall rating for the section. The Strengths and Concerns boxes provide space to identify data and other evidence that supports the rating. The rationale for each rating is important, especially if some of the data or evidence does not fit neatly into the criteria provided.

The following definitions should guide the ratings:

- | | |
|--------------------------------------|---|
| Meets the Standard: | The response reflects a thorough understanding of key issues. It addresses the topic with specific and accurate information that shows thorough preparation and presents a clear, realistic picture of how the school expects to operate. |
| Partially Meets the Standard: | The response addresses most of the criteria, but the responses lack meaningful detail and requires important additional information. |
| Does Not Meet the Standard: | The response does not meet statutory requirements and/or lacks raises substantial concerns about the applicant's understanding of the issue in concept and/or ability to meet the requirement in practice. |

APPENDIX H

1. Describe the school's educational program and how it will identify:
 a) What it means to be an "educated person" in the 21st century; and
 b) How learning best occurs. *5205 (3) (a)*

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
X		

2. Identify the school's goals and how all educational thoroughness standards shall be fulfilled.
5205 (3) (a)

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
X		

3. Identify measurable student educational standards that describe the extent to which all students of the charter school will demonstrate they have attained the skills and knowledge specified as goals in the school's educational program. *5205 (3) (b)*

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
X		

Strengths:

Concerns and Additional Questions:

Review the SDE approved curriculum and text list to make sure the materials are approved. Review to see if any of the materials are approved with reservation.

4. Identify the method by which student progress is to be measured in meeting the school's student educational standards. *5205 (3) (c)*

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
X		

5. Describe how the school's students will be tested with the same standardized tests as other Idaho public school students. *5205 (3) (d)*

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
X		

6. Describe how the school will ensure that it shall be state accredited as provided by rule of the Idaho State Board of Education. *5205 (3) (e); 5210 (4) (b)*

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
X		

APPENDIX H

7. Describe the governance structure of the school, including, but not limited to, the person or entity that shall be legally accountable for the operation of the school and the process the school will follow to ensure parental involvement. *5205 (3) (f)*

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
X		

8. Describe the qualifications to be met by individuals employed by the school. Every person who serves in a public charter school must comply with the professional codes and standards approved by the State Board of Education, including standards for ethics or conduct. *5204A (1); 5205 (3) (g); 5210 (4) (a)*

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
X		
<p>Concerns and Additional Questions: Addresses meeting state and federal guidelines for certification, consider including description relating to highly qualified status. Additional information related to complying with professional codes and standards would be beneficial</p>		

9. Describe the procedures the school will follow to ensure the health and safety of students and staff. *5205 (3) (h)*

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
	X	
<p>Strengths: Good inclusion of the Internet Safety for Minor Policy.</p>		
<p>Concerns and Additional Questions: May want to update Internet Safety policy to include the use of social networking websites and current instant messaging applications. A more detailed explanation, definitions, and/or examples of bullying and harassment should be included. In the Health and Safety section, a reference to the intention to develop an Emergency Operations Plan / Crisis Response Plan should be indicated.</p>		

10. Describe the school's plan for denial of attendance to any student who is or has been:

- An habitual truant
- Incurable
- Deemed by the board of trustees to be disruptive of school discipline or instructional effectiveness
- Detrimental to the health and safety of the other students
- Expelled from another school district or state *5205 (3) (i); 33-205; 33-206*

APPENDIX H

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
X		

11. Describe admission procedures that comply with I.C. § 33-5205(j), to include a provision for over-enrollment, and equitable selection processes for the initial year, as well as subsequent years of operation. Include enrollment capacity of the charter school. *5205 (3) (j) (See Attachment)*

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
	X	

Concerns and Additional Questions:
 In the "Equitable Selection Process & Over Enrollment" section on page 66 the petition states the school shall select students by lottery through an auditor-certified computer program, however on pages 67-68 the enrollment process describes the use of index cards to draw and sort the student names into the priority categories. The two sections should align, regardless of the method used.

On page 67 #3 Letters "A-D" are used to designate the priority groups. There are five priority groups – letters "A-E" should be used. The petition states that "D" will be assigned to students residing within the attendance area; given that they are in the fifth priority group "E" should be assigned to this group and "D" should be assigned to employee's children. The "Note" should be changed to indicate "B"- "E" as well as #6 on page 68.

There is an apparently inadvertent omission on page 65 of the petition where appears the following:

Admission Preferences
 Heritage Academy has established an admission preference for students residing in the attendance area of the public charter school, as required by Section 33-5206, Idaho Code. For the purposes of this petition, the "attendance area" shall refer to the Area of Attendance referenced in .

The petitioners need to insert the omitted reference. We are assuming they intend to refer to the attendance area description on page 25.

12. Describe how waiting lists will be developed and renewed annually. *5205 (3) (j)*

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
X		

13. Describe the manner in which annual reports will be conducted. Each public charter school shall annually submit a report to the authorized chartering entity which approved its charter. The report shall contain the audit of the fiscal and programmatic operations, a report on student progress based on the public charter school's student educational standards, and a copy of the public charter school's accreditation report. *5205 (3) (k); 5206 (7); 5210 (3)*

APPENDIX H

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
	X	
<p>Strengths:</p> <p>Page 59 states than a programmatic audit will be completed annually and submitted to its chartering entity. Page 59 states the school will have an annual fiscal audit and will submit one copy to their chartering entity.</p>		
<p>Concerns and Additional Questions:</p> <p>The petition does not state a copy of the fiscal audit will be submitted to the SDE, which is required by IC 33-701(6) (as required by Idaho Code 33-5210(3)) I could not find anything stating a report on student progress based on the public charter school's student educational standards will be submitted to the chartering entity. Pages 50-54 addresses the measurement of student progress. I could not find anything stating a copy of the school's accreditation report will be submitted to the chartering entity. Page 55 addresses accreditation.</p>		

14. Describe the school's disciplinary procedures, including the procedure by which students may be suspended, expelled and reenrolled. *5205 (3) (l); 33-210*

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
X		

15. Include a provision that ensures all staff members of the school will be covered by all of the following:
- Public Employee Retirement System (PERSI)
 - Federal Social Security
 - Unemployment Insurance/Worker's Compensation Insurance
 - Health Insurance *5205 (3) (m)*

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
X		

16. Describe the public school attendance alternative for students residing within the school district who choose not to attend the public charter school. *5205 (3) (n)*

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
X		

17. Describe the transfer rights of any employee choosing to work in a charter school that is approved by the board of trustees of a school district, and the rights of this employee to return to any non-charter school in the same district. *5205 (3) (o); 33-1217*

APPENDIX H

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
X		

18. Include a provision that ensures that the staff of the public charter school shall be considered a separate unit for purposes of collective bargaining. *5205 (3) (p)*

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
X		

19. Describe the manner by which special education services will be provided to students who are eligible for such services pursuant to the federal Individuals with Disabilities Education Act, including disciplinary procedures for these students. *5205 (3) (q)*

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
Sped Ed & G/T-X		
<p>Strengths: G/T -Dr. Renzulli’s research on gifted education will be a major component of the curriculum. Students will write a personal improvement plan each year. Students are encouraged to be creative and explore personal interests.</p> <p>Special Ed: The school plans to hire certified special education teachers. A process for identifying and serving students with disabilities is clearly defined. Policy for special education will be the Idaho Special Education Manual. Related services will be provided by qualified contractors, if the school does not employ such personnel. LRE is adequately addressed. Transportation as a related service is addressed appropriately.</p> <p>Concerns and Additional Questions: The reference on Tab 3, under “Special Education Services” regarding discipline of students with disabilities is incorrect (chapter 7, section 13). In the current Idaho Special Education Manual, discipline is addressed in chapter 12.</p>		

20. Describe the school’s plan for working with parents who have students who are dually enrolled. *5205 (3) (r); 33-203*

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
X		

21. Describe the process by which citizens in the area of attendance shall be made aware of enrollment opportunities of the public charter. *5205 (3) (s)*

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
X		

APPENDIX H

22. Describe the school's proposal for transportation services. 5205 (3) (t); 5208 (4)

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
X	<input type="checkbox"/>	<input type="checkbox"/>
Strengths:		
<p>Concerns and Additional Questions:</p> <p>May want to expand the transportation-related Idaho Codes listed in the petition to include 33-1006, 33-1501 to 1514, 33-5208, and 67-2806. The codes listed pertain to obtaining contracted busing services rather than transportation policies.</p> <p>While establishing charter boundaries and transportation, reference IC 33-1501 that states, where practicable, shall provide transportation for the public school pupils within the district. SDE understands that the attendance area becomes the zone for providing transportation services to all eligible students living more than 1½ miles from school.</p> <p>Transportation may be reimbursed in advance at 60% with a final reimbursement of a blended 50/85% rate and a block grant per IC 33-1006. In addition, reference IC 33-5208 that limits transportation reimbursement to students within the public charter school's attendance zone that meet one of the following criteria: student resides within the school district in which the public charter school is physically located, or student resides within 15 miles of the public charter school by road.</p> <p>Please contact SDE Transportation Staff with any additional questions on transportation procedures, specifications, and bidding.</p>		

23. Describe the school's plan for termination of the charter by the board of directors, to include:

- Identification of who is responsible for dissolution of the charter school
- A description of how payment to creditors will be handled
- A procedure for transferring all records of students with notice to parents of how to request a transfer of student records to a specific school
- A plan for the disposal of the public charter school's assets. 5205 (3) (u); 5206(8)

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
	X	
<p>Concerns and Additional Questions:</p> <p>The petition states that Heritage Academy will fully cooperate with the Idaho State Charter Commission through the dissolution process. If the Jerome School District approves the petition the Commission would not be involved. It would be more concise to use "the authorizer" instead.</p> <p>The petition states the student records will be transferred to the receiving district. It does not address a notice to the parents on how to request the records.</p> <p>Consider including how personnel files will be handled.</p>		

APPENDIX H

24. Describe the proposed operation and potential effects of the school, including, but not limited to:
- a) facilities to be utilized by the school
 - b) the manner in which administrative services of the school are to be provided
 - c) the potential civil liability effects upon the school and its chartering entity *5205 (4)*

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
X		

25. Include copies of the petition to establish the charter school signed by at least thirty (30) qualified electors of the attendance area designated in the petition. Include proof of elector qualification. *5205 (1) (a)*

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
	X	

Concerns and Additional Questions:

Clarification is needed regarding certification of the qualified elector status of the signatories and the status within the attendance area of those signatories. A possible issue could exist because the attendance area in the petition does not appear to be equivalent to the boundaries of Jerome County. The proposed school's attendance area is described on page 25 of the petition. The North, South, and West boundaries are described as being identical with the North, South, and West boundaries of Jerome County. However, the East boundary is described only as 500 East Road, which, given the other descriptions, implies that the East boundary is not the same as the East boundary of Jerome County. If that, in fact, is the case, then it would not be sufficient for the petitioners to prove only that the petition has been signed by thirty qualified electors in Jerome County. They would also need to show that the thirty electors all reside within the attendance area. In other words, the way the attendance area is described, you theoretically could have someone signing the petition who is an elector within the county but who resided outside the attendance area.

Consider including how personnel files will be handled.

26. Include proof of attendance at the public charter school workshop by at least one (1) person among the group of petitioners. *5205 (5)*

Meets the Standard	Partially Meets the Standard	Does Not Meet the Standard
X		

After a sufficiency review has been conducted by the State Department of Education, the petition and sufficiency may be submitted to an authorized chartering entity for review and approval. Completion of the review process does not ensure approval of the charter school petition, nor does it establish that the school cannot be challenged for failure to comply with state or federal statutes, rules or regulations at some future date. The SDE does not waive its duty to enforce such laws by performing the sufficiency review.

APPENDIX H

For the purpose of implementing the provisions of section 33-5203(2), Idaho Code, the State Board of Education shall assign a number to each petition it receives. Petitions shall be numbered based on the chronological order in which notice of the approved petition is received by the State Board of Education.

Submit Petitions and completed Approval Forms to:

State Board of Education
Tamara Baysinger
650 West State Street, 3rd Floor
P.O. Box 83720
Boise, Idaho 83720-0037

State Department of Education
Michelle Clement Taylor, School Choice Coordinator
650 West State Street, 2nd Floor
P.O. Box 83720
Boise, Idaho 83720-0027

**Appendix I: Training/Professional Development
Proposal from Renzulli Learning**

April 2, 2010

Heritage Academy

P.O. Box 378

Jerome, ID 93338

Dear Heritage Academy:

Thank you for choosing The School-wide Enrichment Model (SEM) as the foundation for teaching and learning at Heritage Academy. We are energized about the fact that many students in Jerome, ID will be given the opportunity to extend and expand their knowledge besides learning about traditional curricula that will help them compete in the 21st Century through SEM and Renzulli Learning. We are also excited about the possibility of immersing your teachers and administrators in Dr. Renzulli's scientific and research-based model through numerous Professional Development opportunities both at University of Connecticut and onsite at your future school campus. Our goal is to assist

Heritage Academy's board members, future teachers and administrators in their endeavor to provide a much more effective way and engaging way to teach and in their **mission to maintain, enhance, and further students' love of learning by providing an enriched curriculum that grows with the student. We also want to help them in their effort to supply a safe and respectful environment that encourages innovative teaching methods that will foster students to become lifelong learners.**

This budgetary proposal considers Heritage Academy's first three-years of operation and contains pricing **for Professional Development specific to SEM and Renzulli Learning both onsite and during our Summer Institute (Confratute) held at University of Connecticut.** This proposal also includes a **three-year subscription to Renzulli Learning** that is a necessary component to the success of SEM. **Renzulli Learning is the platform in which each students will be identified of their areas of interest/strengths, learning styles, and product choices. The program is also where the students' Total Talent Portfolio will be kept and managed by both teachers and students.**

As mentioned previously, this proposal includes comprehensive and concentrated SEM training. Our phased professional development approach ensures that Heritage Academy's administrators and teachers will have a much

deeper understanding SEM that will ensure the success of its implementation at the school.

As you read through the enclosed proposal, we trust you'll agree that The School-wide Enrichment Model and Renzulli Learning represents a solution to both your values and its commitment **to maintain, enhance, and further students' love of learning by providing an enriched curriculum that grows with the student and your mission to help your administrator and teachers in their effort to supply a safe and respectful environment that encourages innovative teaching methods that will foster students to become lifelong learners.**

Our program is based on more than 30 years of research at the University of Connecticut with one seminal conclusion that guides all our energy and effort - that **all children can achieve if one takes the time to celebrate their personal strengths and motivational make-up.**

We truly appreciate the opportunity to partner with you and are keenly aware of the emphasis you place in providing innovative teaching methods to your students.

Sincerely,

Cristy A. Rivera

Northwest Regional Manager – Renzulli Learning

A University of Connecticut Research and Development Company

NEAG Center for Gifted Education

Phone: 510-912-0080

crivera@renzullilearning.com

Table of Contents

Page 3: Executive Summary

Page 4-5: Program Overview

Page 6: NCLB Correlations

Page 7: Sole Source Memorandum

Page 8: Proposal

Executive Summary

The following summary captures the core philosophy of our partnering ideas.

Support of Heritage Academy's Mission to maintain, enhance, and further students' love of learning by providing an enriched curriculum that grows with the student. We also want to help them in their effort to supply a safe and respectful environment that encourages innovative teaching methods that will foster students to become lifelong learners.

- Quality Instruction, Learning Opportunities and Educational Environments For All: In support of your mission, SEM and Renzulli Learning provides scientifically-based, research-supported, and practice-proven teaching & learning strategies.
- Personal Excellence and Responsible Citizenship – In support of this commitment to ensure that every member of your school team possesses the leadership skills and attributes to support the learning process of every student each and every day, SEM and Renzulli Learning provides a key to forging relationships in establishing individualized dialogues between educators, students, and parents through its administrator/manager and parent portals.

Renzulli Learning/Heritage Academy's Shared Objectives:

- Achieve growth for students that will be participating in SEM and Renzulli Learning by embarking on a **targeted strength identification, exploration, & development mission.**
- Provide **access to higher-level critical thinking skills development and a strong grasp of the real-world applications of knowledge for all students.**
- Assist educators in **further raising test scores through differentiated, strength-based instructional strategies.**

The Renzulli Learning System is a web-based teaching and learning tool that is based on more than thirty years of research and development of **SEM** by Drs. Joseph Renzulli and Sally Reis at the University of Connecticut. The program automates SEM's foundation of an individualized assessment of each child's interests and preferred methods of engagement and learning. Once a student's strengths have been identified, Renzulli Learning delivers personalized learning experiences to help them think effectively and learn best.

In a phrase, it supports student motivation; saves teachers time; and raises student test scores through engagement.

Renzulli Learning, **based on SEM**, is comprised of four key components providing a teacher's assistant that determines how each student likes to learn.

- **Renzulli Profiler.** The profiler allows teachers to receive a comprehensive learning assessment of each student's motivational learning environment in about 40 minutes. The Profiler focuses on goal setting and strength-based learning skills development.
- **Renzulli Differentiation.** The differentiation tool matches safe, classroom appropriate online and offline resources to each student's interest areas and learning styles. Content and concept retention increases dramatically due to the personalized learning experience.
- **Lesson Planning and Differentiation Tool.** This allows teachers and students to work collaboratively on content areas, curricular topics, assignments, and projects. Teachers can differentiate and disseminate a lesson for each diverse segment of their classroom more efficiently.
- **Wizard Project Maker:** This guide allows teachers to help students organize, plan, and produce original research, investigative projects, and the development of higher level critical thinking and problem-solving skills, encouragement to present ideas to audience, and other wide variety of creative undertakings. Specifically, this feature provides students with the met cognitive skills to:
 - Define a project, set a goal, and develop a time line and plan of action;
 - Identify & evaluate resources that they have access to i.e. Internet, teachers etc.
 - Prioritize and refine goals
 - Balance the resources needed to meet multiple goals
 - Learn from past actions and projecting future outcomes, and
 - Monitor progress, making necessary adjustments as a project unfolds.
- **Total Talent Portfolio:** The electronic talent portfolio, **in SEM**, stores student products and records in an individualized learning environment that tracks student's progress. It is accessible anytime, anywhere and can transport student information from grade-to-grade, or school-to-school.
- **Personal Success Plan™:** A motivational, skills-development tool to guide students through the identification and pursuit of social & academic talents, role models, careers, plans, and goals (available Gr. 5-12).

Correlation to U.S. Department of Education Content Standards

The Renzulli Learning is **correlated** to the **US Dept. of Education National Standards**. Through Renzulli Learning, teachers can access a list of all of the correlated Content Standards for grades K-12. By clicking on a subject and selecting a grade level, the teacher can view a list of the strands that need to be covered under each standard. Teachers can find dynamic, personalized materials for the teaching of specific content standards. We think of this as the **standards without standardization**.

Integration with No Child Left Behind, Title I and Title II, Part D

NCLB lists three major goals for the use of education technology:

Primary Goal - Improve student academic achievement through the use of technology in elementary schools and secondary schools.

- ✓ **See previous sections entitled “Research Background” for data about how Renzulli Learning increases student achievement on state standardized tests.**

Assist every student in crossing the digital divide by ensuring that every student is technologically literate by the time the student finishes the eighth grade, regardless of the student’s race, ethnicity, gender, family income, geographic location, or disability.

- ✓ **Renzulli Learning is a powerful tool for increasing technological literacy, by captivating students with interest-based resources that speak to their unique learning styles. Renzulli appeals to students from all backgrounds precisely because the program is blind to students’ race, ethnicity, income or disabilities.**

To encourage the effective integration of technology resources and systems with teacher training and curriculum development to establish research-based instructional methods that can be widely implemented as best practices by State educational agencies and local educational agencies.

- ✓ **Renzulli supports the integration of technology with teacher professional development by not only providing professional development in the use of this program, but by offering the premier curriculum-planning platform software available for teachers to structure their entire curriculum around Renzulli technology.**

Sole Source Memorandum

April 2, 2010

Heritage Academy

P.O. Box 378

Jerome, ID 93338

Dear Heritage Academy Founders:

This memo is to affirm that Renzulli Learning Systems, LLC is the sole source vendor for official materials related to any programs and services offered by Renzulli Learning Systems. This includes, but is not limited to, official publications, software and resources related to The Renzulli Learning System™, The Renzulli Profiler™, The Renzulli Enrichment Resource Search Engine™, The Renzulli Learning Wizard Project Maker™, and the Renzulli Enrichment Differentiation Database™. Only Renzulli Learning Systems, LLC provides these programs and services and official materials related to these programs and services.

Additionally, the research and development that serves as the foundation for the design of, and features contained within Renzulli Learning Systems are proprietary and available solely through Renzulli Learning Systems, LLC. This includes, but is not limited to, the methodological, theoretical, and practical applications of The Enrichment Triad Model (Dr. Joseph Renzulli; 1977), The Schoolwide Enrichment Model (Renzulli, 1977; Renzulli & Dr. Sally Reis, 1985, 1997), the Interest-A-Lyzer Family of Instruments (Renzulli; 1997), Learning Styles Inventory (Renzulli; 2000), and Schoolwide Enrichment Model – Reading Framework (Reis; 2004). Please refer to Appendix A for detailed Research & Development initiatives that further support Renzulli Learning Systems, LLC.

Michael L. Daversa



CEO and President

Renzulli Learning Systems, LLC

Implementation of SEM consisting of 3-Years of SEM Professional Development, Renzulli Learning Professional Development, and Renzulli Learning Subscription

ITEM 1 - FIRST YEAR PROFESSIONAL DEVELOPMENT:

SEM and Renzulli Learning Professional Development consisting of:

PHASE 1 & 2 SEM & RENZULLI LEARNING

- 3 Months Before School Opens
 1. Faculty Orientation - SEM & Renzulli Learning Overview
½ day (3-4 hours). We will provide you as part of your training materials (at no charge) Dr. Joseph Renzulli's Reference Book entitled "The School-wide Enrichment Model, A How-To Guide for Educational Excellence" for each attendees
 2. Renzulli Learning Basic Training - **2 each – ½ day sessions (3 hours each)**
This training consists of learning about conducting Student' Surveys of Interest, Learning Styles, and Product Styles and navigation of program which is

a major component of SEM

PHASE 3 ENRICHMENT CLUSTER PREPARATION

3. 1-1/2 months or 6 weeks before school opens, training for entire staff and facilitators in Clusters and use of RENZULLI LEARNING with Clusters - **1 full day @ 6 hours**
4. 4 weeks before Clusters begin: training for staff and facilitators in nuts and bolts of implementing Clusters and development of Cluster descriptions and plans, including use of RENZULLI LEARNING - **1 full day @ 6 hours**
5. 1 week before Clusters begin: On-site, last-minute planning, troubleshooting – **½ day @ 2-3 hours**
6. Midway through Clusters cycle: check in with Clusters or Curriculum coordinator and facilitators (if applicable), status report and troubleshooting, how RENZULLI LEARNING is being used, plan Product Fair, plan evaluation process for students and facilitators, introduce evaluation forms and procedures – **½ day @ 3 hours**
7. End of Clusters cycle and Product Fair: debrief and analyze student and facilitator or teacher evaluations, including reflection on how Renzulli helped. Plan for future cycles – **½ day @ 3 hours**

PHASE 4 - CURRICULUM ENRICHMENT & DEVELOPMENT(with Renzulli woven into each session)

8. Enrichment Triad Introduction and Type 1 session and workshop – ½ day @ 4 hours
9. Type 2 training and workshop - ½ day @ 3 hours
10. Type 3 training and workshop – ½ day @ 3 hours
11. Coaching in curriculum development by grade level - 2 full days @ 6 hours/day

PHASE 5 - PEDAGOGY OF DIFFERENTIATION AND ENRICHMENT (with Renzulli woven into each session)

12. Session 1 - Introduction and training in differentiation -1 full day @ 6 hours
13. Session 2 - Training in enrichment for differentiation – ½ day @ 3 hours
14. Session 3 - Follow-up to ensure that model and component are being implemented correctly, problem-solving, planning - 1 full day @ 6 hours
15. Coaching - Follow-up assistance, planning, 2-3 hours per grade level - 2 full days @ 6 hours/day

PHASE 6 - CURRICULUM COMPACTING AND ADVANCED DIFFERENTIATION

16. Introduction and training in curriculum compacting and advanced Differentiation - 1 full day @ 6 hours
17. Follow-up session, classroom observations, use of RENZULLI LEARNING - 1 full day @ 6 hours
18. Coaching by grade level, 2-3 hours per grade level - 2 full days @ 6 hours/day

PHASE 7 – DIFFERENTIATION IN CONTENT AREAS

Small group coaching in specific content areas, by content area or by grade level, using RENZULLI LEARNING - 2 full days @ 6 hours

- Literacy
- Math
- Science
- Social Studies
- Arts
- Technology

PHASE 8 – SPECIAL TOPICS IN GIFTED EDUCATION

Full faculty session covering various topics within gifted and talented education

- 2 full days @ 6 hours:

- Nature and needs of gifted students and why do we need to meet those needs?
- Social & emotional needs of the gifted
- Identification and services for the gifted
- Twice exceptional students
- At-risk students
- Highly gifted students
- Gifted underachievers
- Early childhood gifted students
- Perfectionism
- Counseling the gifted, careers (Renzulli Learning Systems Personal Success Plan - PSP)
- Gifted Females, Gifted Males
- Cultural considerations

ITEM 1 - FIRST YEAR PROFESSIONAL DEVELOPMENT FEES (FLAT FEE):

10 ea. - 1/2 days onsite @ \$2,000.00 per day	= \$20,000.00
16 ea – full day onsite @ \$3,000 per day	= \$48,000.00
Sub-Total	= \$68,000.00

ITEM 2 - SECOND YEAR IMPLEMENTATION:

- Before school-year begins, training of new staff in SEM and RENZULLI LEARNING

- 1 full day @ 6 hours

- Early in school year, training for all faculty and administrators in new features of

RENZULLI LEARNING – 1/2 day @ 3-4 hours

- Enrichment Clusters for all faculty and facilitators: problem-solving, plan next

cycle – 1/2 day @ 3-4 hours

- Follow-up coaching with grade level teams:

- SEM - how it appears in the classroom, interweave components of the model
 - Enrichment Triad using RENZULLI LEARNING
 - Curriculum development (units, assignments, assessment) using RENZULLI LEARNING
 - Differentiation using RENZULLI LEARNING
 - Curriculum Compacting using RENZULLI LEARNING
- 1 full day per grade level @ 6 hours per day x 6 grade levels = 6 full days of coaching**

ITEM 2 - SECOND YEAR PROFESSIONAL DEVELOPMENT (FLAT FEE):

2 ea. - 1/2 days onsite @ \$2,000.00 per day	= \$ 4,000.00
7 ea – full day onsite @ \$3,000 per day	= \$21,000.00
Sub-Total	= \$25,000.00

ITEM 3 - THIRD YEAR IMPLEMENTATION:

- Before school-year begins, training of new staff in SEM and RENZULLI LEARNING,
 - 1 full day @ 6 hours**
- Early in school year, training for all faculty and administrators in new features of RENZULLI LEARNING - 1/2 day @ 3-4 hours
- Coaching follow-up with grade-level teams. Topics, as needed: Enrichment, Triad model, differentiation, curriculum compacting, Enrichment Clusters, RENZULLI LEARNING
 - 1 full day per grade level @ 6 hours per day x 6 grade levels = 6 full days of coaching**

ITEM 3 - THIRD YEAR PROFESSIONAL DEVELOPMENT (FLAT FEE):

1 ea. - 1/2 days onsite @ \$2,000.00 per day	= \$ 2,000.00
7 ea – full day onsite @ \$3,000 per day	= \$21,000.00
Sub-Total	= \$23,000.00

ITEM 4 – RENZULLI LEARNING SCHOOL SITE LICENSE SUBSCRIPTION:

- Unlimited Student Licenses (this will also accommodate for future enrollment growth)
- School administrators and Board Members

- All Teachers
- All parents / guardians of participating students

\$5,000.00 x 3 years subscription = \$15,000.00

ITEM 5 – CONFRATUTE ATTENDANCE (summer institute at University of Connecticut):

Attendance at Confratute (summer institute at University of Connecticut), includes registration, accommodation & all meals, **excludes airfare**

4 attendees x \$1,500.00/person x 3 years = \$18,000.00

Total Investment for 3 years:

YEAR 1 Professional Development = \$68,000.00

YEAR 2 Professional Development = \$25,000.00

YEAR 3 Professional Development = \$23,000.00

Renzulli Learning Subscription for 3 years = \$15,000.00

Confratute (Summer Institute, 4 attendees for 3 years) = \$18,000.00

Total Investment = \$149,000.00

Less 18% Discount for Multi-Year Contract = <\$27,540.00>

Grand Total Investment = \$122,180.00

Appendix J – Market Analysis

The Board of Directors recognizes several factors that demonstrate the need for additional educational offerings in Jerome County. There is little choice in public education in the immediate area. Currently there are no charter schools within the district/county. In fact, for residents of Jerome County, the closest public education choices are Xavier Charter School in Twin Falls (approximately 20-25 minutes from Jerome) and North Valley Academy in Gooding (approximately 25-30 minutes from Jerome). This limits opportunities to families living in close proximity of these schools or to families who have the resources to commute. Notwithstanding, opportunities to enroll at these schools in grades K-6 are limited. For example, the closest choice, Xavier



Charter School, currently reports over 250 students on its waitlist in grades K-6 alone. The need for choice in public education is further demonstrated by the fact that Jerome School District is currently in its third year of improvement under No Child Left Behind.

A snapshot of the public school options for Jerome families reveals the educational landscape of the area. There are four public elementary schools serving grades K-6

located within three-miles of our proposed locations.



As illustrated on the map above, these schools include: Horizon Elementary (701 students), Jefferson Elementary (524 students), Jerome Middle School (782 students), and Summit Elementary School (557 students), for a total of 2,564 students within three miles.

In 2009 Jerome County Residents defeated a bond for additional school facility funding in the district. In addition, Jefferson Elementary currently has four temporary/modular classrooms and two temporary/modular classrooms are being utilized at Horizon Elementary. It is important to note that Jefferson and Horizon only serve students in grades K-3, and both schools are utilizing modular space to compensate for the lack of space for K-3 students. This is of particular importance in support of our decision to offer two classes in grades K-3, and then one class per grade in grades 4-6. We anticipate a higher enrollment in grades K-3 based on the fact that the most overcrowded school facilities in our district are those serving K-3. Our expectation is also based on the historical trend of charter schools filling their lower grades faster than upper level grades, especially in the first year of operation. We also feel it is important to note that we do not anticipate all students will come from our local district. While the actual number of students that will come from the district would be difficult to determine

at this time, we have been told that some charter school's populations consist of as much as 40% homeschooled families. Finally, because the district covers such a large geographic scope, we do not anticipate a significant portion of our population will come from other districts, but it would be reasonable to anticipate some students moving from surrounding districts.

Notwithstanding the foregoing, it is our firm belief that a combination of a centralized location, district demographics, an innovative and effective teaching model (The Renzulli Learning System), and a dedication to informing families in our community of the opportunities available at Heritage Academy will provide not just another choice, but a competitive advantage to attend Heritage Academy.

We are committed to enrich the learning environment through a diverse student population. We will utilize online and offline channels of communication to generate awareness in the enrollment process to those who wish to enroll. An integrated marketing approach will spread the word to our community; for example, we will:

1. Create an interactive website with an online enrollment application.
2. Participate in Community celebrations and distributing information about the school.
3. Submit press release(s) to local newspapers (both English and Spanish).
4. Distribute informational packets, brochures, posters or postcards throughout the area. As well as neighboring community centers and/or libraries.
5. Post notice(s) with commercial businesses in the local area as parents often choose schools for their children located near work.
6. Continue to publicize and host parent informational meetings.
7. Use Social Media (i.e. Facebook, Twitter, and LinkedIn) to promote Heritage Academy online.
8. Possible use of outdoor (billboard) advertising along the major routes in the area.
9. After charter approval, we will post notices of public board meetings on the school's website as the location of the meeting and other locations that will make the public aware of our presence.

Appendix K – Letters of Intent to Lease/Sale

Letter of Intent

THIS Letter of Intent (hereinafter referred to as the "LOI") is made and entered into this 26 day of April 2010, by and between **Magic Valley Christian School** (hereinafter referred to as "Landlord") and **Heritage Academy, Inc.** (hereinafter referred to as "Tenant").

The following outlines the terms and conditions upon which the parties agree to focus their discussions in preparation to execute a land lease agreement: Landlord hereby agrees to rent/lease Tenant a total of 8 city lots of land described as block 124 lots 1,2,3,4,13,14,15, &16 City of Jerome, County of Jerome, State of Idaho, 83338 (the "Property") for a negotiated price not to exceed one thousand dollars (\$1000) per month for 24 months. Tenant considers the Property a desirable location to construct its school facility and requires additional time to receive approval from the Idaho Public Charter School Commission ("IPCSC") for its charter petition and to determine the feasibility of the Property for its intended use.

This LOI must be superseded by a fully executed land lease agreement. Unless and until this LOI is superseded by a fully executed land lease agreement, neither party is legally bound. This LOI is non-binding on both parties and any obligations set forth herein are contingent upon the Tenant having their petition approved by the Idaho Charter School Commission and the approval of the Heritage Academy Charter School Board approving the purchase of the above described land.

This LOI does not obligate either party, nor does it authorize either party, to incur any costs or liabilities whatsoever that are binding on the other party. Neither party is obligated to reimburse out-of-pocket expenses of the other party throughout the process of negotiating a final purchase agreement. This agreement shall expire 90 Ninety days from the date the Idaho Charter School Commission approves the Heritage Academy Charter School's petition.



Landlord



Tenant

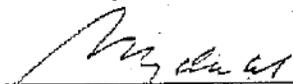
Letter of Intent

THIS Letter of Intent (hereinafter referred to as the "LOI") is made and entered into this 26 day of April 2010, by and between Eastside Group, LLC (hereinafter referred to as "Seller") and Heritage Academy, Inc. (hereinafter referred to as "Buyer").

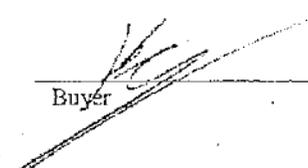
The following outlines the terms and conditions upon which the parties agree to focus their discussions in preparation to execute a land purchase agreement: Seller hereby agrees to sell Buyer a total of 4.36 acres of land described as lots 2-1 and 2-2 of the Glen Eagle Commercial subdivision preliminary plat in the area of East K Ave. East and Tiger Drive Jerome City Jerome County State of Idaho 83338 (the "Property") for a negotiated price not to exceed three hundred and twenty seven thousand dollars (\$327,000). Buyer considers the Property a desirable location to construct its school facility and requires additional time to receive approval from the Idaho Public Charter School Commission ("IPCSC") for its charter petition and to determine the feasibility of the Property for its intended use.

This LOI must be superseded by a fully executed land purchase agreement. Unless and until this LOI is superseded by a fully executed land purchase agreement, neither party is legally bound. This LOI is non-binding on both parties and any obligations set forth herein are contingent upon the Buyer having their petition approved by the Idaho Charter School Commission and the approval of the Heritage Academy Charter School Board approving the purchase of the above described land.

This LOI does not obligate either party, nor does it authorize either party, to incur any costs or liabilities whatsoever that are binding on the other party. Neither party is obligated to reimburse out-of-pocket expenses of the other party throughout the process of negotiating a final purchase agreement. This agreement shall expire 90 Ninety days from the date the Idaho Charter School Commission approves the Heritage Academy Charter School's petition.



Seller



Buyer

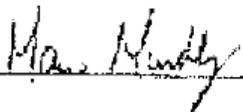
Letter of Intent

THIS Letter of Intent (hereinafter referred to as the "LOI") is made and entered into this 26 day of May 2010, by and between *Nuddy Estate* (hereinafter referred to as "Seller") and *Heritage Academy, Inc.* (hereinafter referred to as "Buyer").

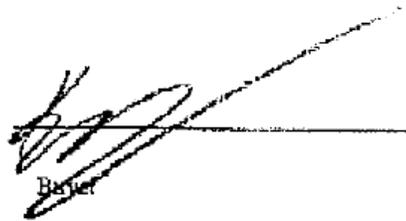
The following outlines the terms and conditions upon which the parties agree to focus their discussions in preparation to execute a purchase and sale agreement: Seller hereby agrees to sell Buyer a total of approximately 7 Acres of land, more particularly described as Lot 1-11, Blk. 1 Hovey Sub. - Lot 1-16, Blk. 2, Hovey Sub. - Lot 1-7, Blk. 3 Hovey Sub. Jerome City Jerome County State of Idaho 83738 (the "Property") for a negotiated price not to exceed Three Hundred Ninety-Nine Thousand and Zero (00) dollars (\$399,000). Buyer considers the Property a desirable location to construct its school facility and requires additional time to receive approval from the Idaho Public Charter School Commission ("IPCSC") for its charter petition and to determine the feasibility of the Property for its intended use and to execute the duly authorized purchase and sale agreement.

This LOI must be superseded by a fully executed land purchase and sale agreement. Unless and until this LOI is superseded by a fully executed land purchase and sale agreement, neither party is legally bound. This LOI is non-binding on both parties and any obligations set forth herein are contingent upon the Buyer having their petition approved by the Idaho Charter School Commission and the approval of the Heritage Academy Charter School Board approving the purchase of the above described land.

This LOI does not obligate either party, nor does it authorize either party, to incur any costs or liabilities whatsoever that are binding on the other party. Neither party is obligated to reimburse out-of-pocket expenses of the other party throughout the process of negotiating a final purchase and sale agreement. This agreement shall expire 90 Ninety days from the date the Idaho Charter School Commission approves the Heritage Academy Charter School's petition.



Seller



Buyer

Appendix L – Modular Company Quotes



4055 S. Eagleson rd
 Boise, ID. 83705
 Ph: 208-362-7587
 Fx: 208-362-7588

Quotation

Customer: Heritage Academy	Ship to: Jerome, ID.
Attn: Kelly Bangerter Phone: 208-644-2667	

July 21, 2010	Terms: Upon Invoice	Ship Via: Common Carrier
Salesman: Don Ruesch	Quotation good for 30 days, subject to availability	Date required: TBD

DESCRIPTION ITEM #1

1	28'x64' Double wide mobile classroom with RR's
---	--

Pricing:

1A: Lease rates:

12 month 28'x64' classroom lease rate: \$1,395.00 mo
 24 month 28'x64' classroom lease rate: \$1,295.00 mo

Price is for building only and does not include applicable tax, and installation charges

Installation charges (within Jerome, ID):

Delivery: \$2,376.00
 Set-up *: \$2,745.00

Return and teardown charges:

Current rate at time of return

Optional Services **:

Anchors: \$65.00 ea x 18-24
 Wood skirting: \$2,224.00 (includes wood frame backing; no insulation)
 Vinyl skirting: \$1,637.00 (no framing or insulation)
 HC ramp with switchback: \$206.00 mo/ea (\$400 set up, \$400 teardown)

Not included:

Taxes
 Ramp or Deck

APPENDIX L – Modular Company Quotes

Kelly Bangerter

From: info@modulargenius.com
Sent: Friday, June 25, 2010 10:54 AM
To: Kelly Bangerter
Subject: Kelly Bangerter, Modular Genius, Inc. is pleased to provide Price Quote ID: Q3937
Attachments: Modular-Building-E10.pdf

Dear Kelly Bangerter,

Thank you for choosing **Modular Genius, Inc.** as your building and space planning expert. Our experienced and knowledgeable construction specialists are proud to provide our Smart Building solutions. We look forward to assisting you with your total building turnkey construction needs. We are committed to making sure your project is most successful and that it meets all your requirements, budget and project schedule.

You should have received a floor plan sent to you via email or you may have down loaded it from our floor plan and design galleries. Below is a budgetary price quote based on that floor plan for your review, use and comment. Please keep in mind that this is simply a starting point.

The project sale price range is based on your following selections:

Quote ID: Q3937
Square Feet: 9240
Building Type: Education / Classroom
Floor Plan Number: E10

Building Grade: Base Building
Services / Installation Type: Total Turnkey

Project Sale Price: \$861,352.80

The scope of work for this budgetary price quote should be based on the information above and the following considerations:

- All pricing is budgetary and valid within the United States, Eastern, Mid-Atlantic region only and should not be considered as a final offer by Modular Genius, Inc.
- Standard Modular Genius, Inc. new building specifications (IBC - 5B Wood) and design construction are considered.
- Buildings include HVAC, plumbing, electric and excludes but is not limited to the following (fire suppression systems, final data and phone hard wiring, furniture and accessories.)
- Minimal site work is considered and excludes but is not limited to the following (site obstruction removals, new roadwork or parking lots, storm water management, taxes or fees)
- Utility connection estimates are considering sufficient capacities available on site within 10' of the modular building location.
- Longer term operating leases, Finance leases and other Purchase Options are available; however, they will require personal consultation by a Modular Genius, Inc. Smart Building Specialist.

A project of this size and type will require additional information and development meetings with a Modular Genius, Inc. Smart Building Specialist. Please contact us via website, email, fax, phone or most importantly in person so we can sit down and discuss your project further.

APPENDIX L – Modular Company Quotes

Best Regards,

Brad R. Gudeman
Smart Building Specialist

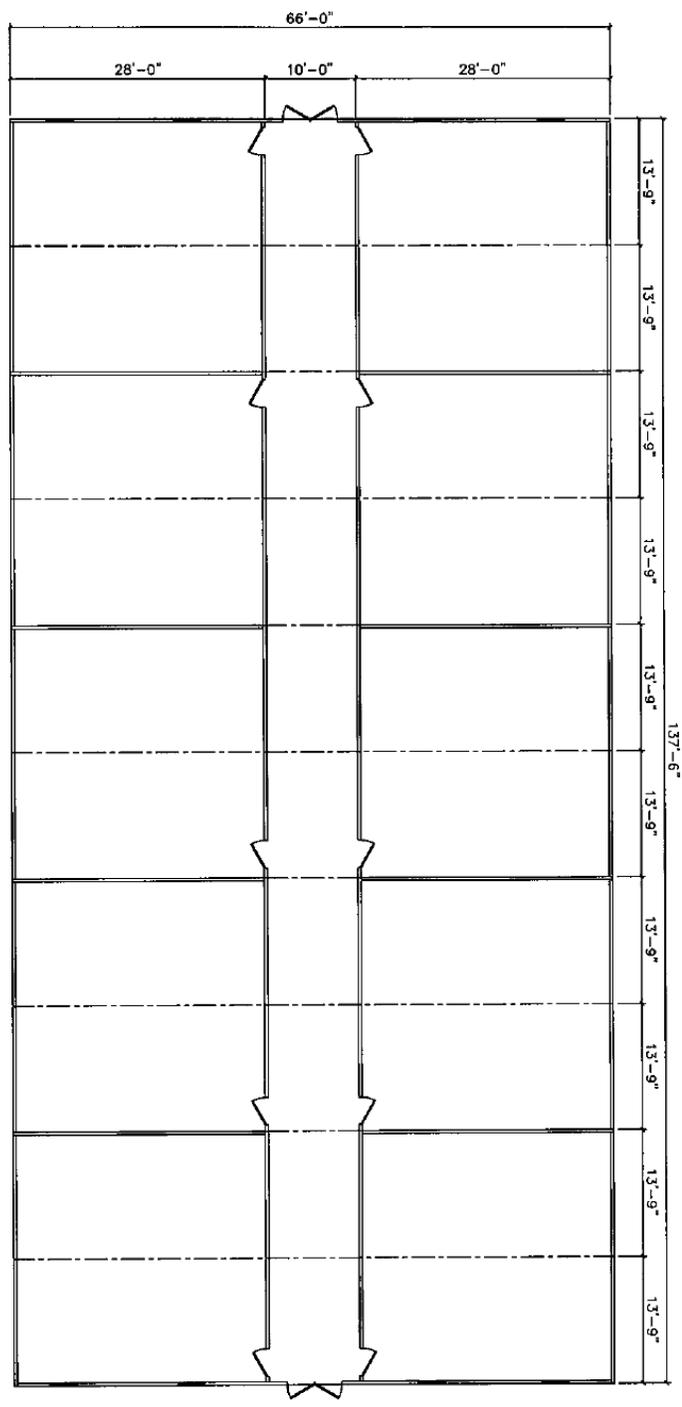
Modular Genius, Inc. 220 Franklin Street Bel Air, MD 21014 USA
(410)420-7586 phone (410)420-7594 fax www.modulargenius.com

APPENDIX L – Modular Company Quotes

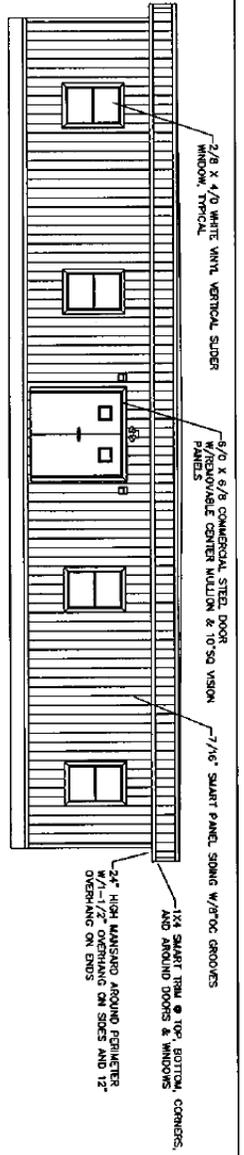
MODULAR GENIUS
SMART BUILDING

GENERAL BUILDING INFORMATION:
 DRAWING NUMBER: E10
 NOMINAL BUILDING SIZE: 140'x66'
 SQUARE FOOTAGE: 9240
 BUILDING USE: EDUCATIONAL (E)
 www.modulargenius.com (888) 420-1113

GENERAL CODE INFORMATION:
 THE MINIMUM AND MAXIMUM NUMBER OF WINDOWS AND DOORS SHALL BE LIMITED TO THE CODE REQUIREMENTS FOR EGRESS AND ENERGY CONSERVATION. THE MINIMUM AND MAXIMUM BUILDING SQUARE FOOTAGE SHALL BE LIMITED TO THE REQUIREMENTS OF THE APPLICABLE BUILDING CODE. PERMANENT OR TEMPORARY FOUNDATION SYSTEM AND APPROVED BY THE LOCAL OFFICIAL HAVING JURISDICTION. THE FINAL LAYOUT IS SUBJECT TO REVIEW FOR COMPLIANCE WITH THE BUILDING CODE ENFORCED IN THE AREA THE BUILDING WILL BE SET IN.



CLASSROOM, CONFERENCE ROOMS, OFFICES, CLOSETS AND RESTROOMS CAN BE ADDED OR REMOVED. RESTROOMS CAN BE ADDED OR REMOVED. WINDOW AND DOOR QUANTITIES CAN ALSO BE ADDED OR DELETED. RESTROOMS WOULD EITHER HAVE TO BE ADDED TO BUILDING TO APPROVAL. THE EXISTING RESTROOM FACILITIES ON SITE CAN BE USED.



TYPICAL BUILDING ELEVATION

Kelly Bangerter

From: info@modulargenius.com
Sent: Friday, June 25, 2010 11:00 AM
To: Kelly Bangerter
Subject: Kelly Bangerter, Modular Genius, Inc. is pleased to provide Price Quote ID: Q3939
Attachments: Modular-Building-E10.pdf

Dear Kelly Bangerter,

Thank you for choosing **Modular Genius, Inc.** as your building and space planning expert. Our experienced and knowledgeable construction specialists are proud to provide our Smart Building solutions. We look forward to assisting you with your total building turnkey construction needs. We are committed to making sure your project is most successful and that it meets all your requirements, budget and project schedule.

You should have received a floor plan sent to you via email or you may have down loaded it from our floor plan and design galleries. Below is a budgetary price quote based on that floor plan for your review, use and comment. Please keep in mind that this is simply a starting point.

The Operating Lease Rate Per Month is based on your following selections:

Quote ID: Q3939
 Square Ft: 9240
 Building Type: Education / Classroom
 Floor Plan Number: E10

Lease Term: 24 Months

Lease Rate Per Month: \$13,715.86

The installation cost is based on your following selections:

Building Grade: Base Building
 Services / Installation Type: Total Turnkey

Installation Cost: \$537,952.80

The scope of work for this budgetary price quote should be based on the information above and the following considerations:

- All pricing is budgetary and valid within the United States, Eastern, Mid-Atlantic region only and should not be considered as a final offer by Modular Genius, Inc.
- Standard Modular Genius, Inc. new building specifications (IBC - 5B Wood) and design construction are considered.
- Buildings include HVAC, plumbing, electric and excludes but is not limited to the following (fire suppression systems, final data and phone hard wiring, furniture and accessories.)
- Minimal site work is considered and excludes but is not limited to the following (site obstruction removals, new roadwork or parking lots, storm water management, taxes or fees)
- Utility connection estimates are considering sufficient capacities available on site within 10' of the modular building location.
- Longer term operating leases, Finance leases and other Purchase Options are available; however, they will require personal consultation by a Modular Genius, Inc. Smart Building Specialist. Teardown and removal cost at the end of the lease term is not included in the

APPENDIX K

prices above. This cost is the responsibility of the customer and will be paid at lease termination calculated at Modular Genius, Inc. cost + 15% profit / overhead.

A project of this size and type will require additional information and development meetings with a Modular Genius, Inc. Smart Building Specialist. Please contact us via website, email, fax, phone or most importantly in person so we can sit down and discuss your project further.

Best Regards,

Brad R. Gudeman
Smart Building Specialist

**Modular Genius, Inc. 220 Franklin Street Bel Air, MD 21014 USA
(410)420-7586 phone(410)420-7594 fax www.modulargenius.com**

MODULAR GENIUS

SMART BUILDING

GENERAL BUILDING INFORMATION:

DRAWING NUMBER: 510

NOMINAL BUILDING SIZE: 140'x66'

SQUARE FOOTAGE: 9240

BUILDING USE: EDUCATIONAL (E)

GENERAL CODE INFORMATION:

THE MINIMUM AND MAXIMUM NUMBER OF WINDOWS AND DOORS SHALL BE LIMITED TO THE CODE REQUIREMENTS FOR EGRESS AND ENERGY CONSERVATION. THE MINIMUM AND MAXIMUM BUILDING SQUARE FOOTAGE SHALL BE LIMITED TO THE REQUIREMENTS OF THE ADOPTED BUILDING CODE.

THE BUILDING SHALL BE SET WITH A PERMANENT OR TEMPORARY FOUNDATION SYSTEM AND APPROVED BY THE LOCAL OFFICIAL HAVING JURISDICTION.

THE PERMIT LAYOUT AREA SUBJECT TO REVIEW FOR COMPLIANCE WITH THE BUILDING CODE SHALL BE SHOWN IN THE AREA THE BUILDING WILL BE SET IN.

GENERAL BUILDING INFORMATION:

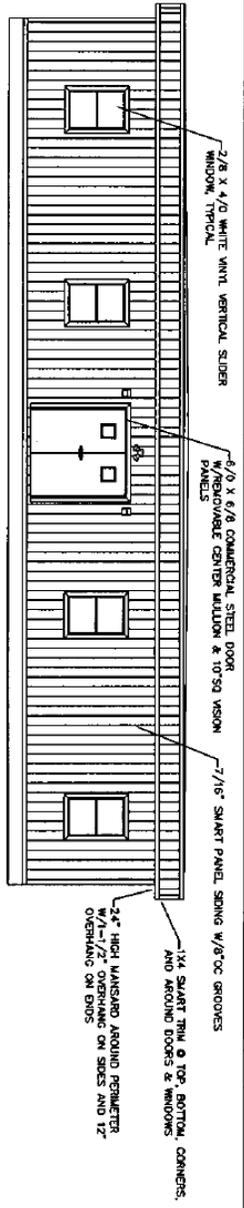
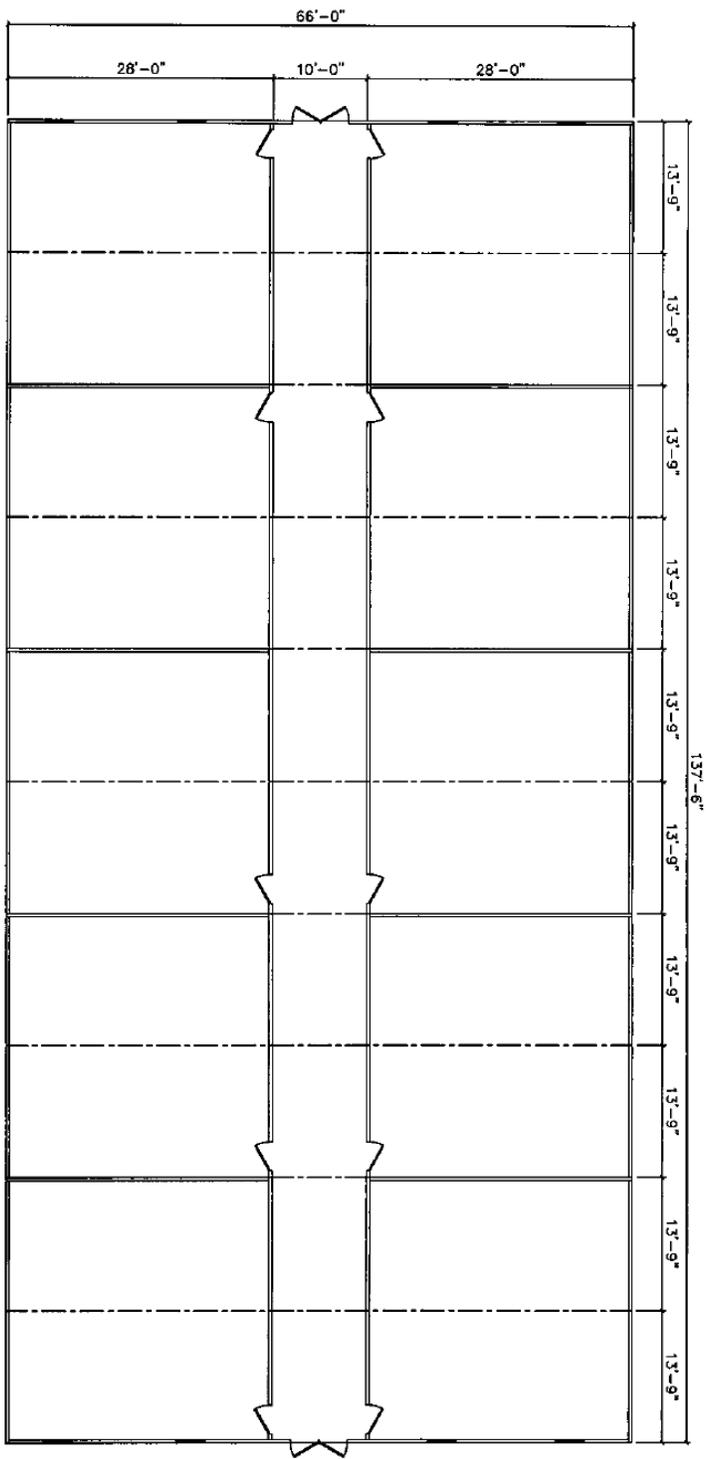
DRAWING NUMBER: 510

NOMINAL BUILDING SIZE: 140'x66'

SQUARE FOOTAGE: 9240

BUILDING USE: EDUCATIONAL (E)

www.modulargenius.com (888)420-1113



TYPICAL BUILDING ELEVATION

CLASSROOM, CONFERENCE ROOMS, OFFICES, CLOSETS AND RESTROOMS CAN BE ADDED OR RESIZED TO MEET YOUR SPECIFIC SPACE REQUIREMENTS. WINDOW AND DOOR QUANTITIES CAN BE ADJUSTED TO MEET YOUR REQUIREMENTS. RESTROOMS WOULD EITHER HAVE TO BE ADDED TO BUILDING TO MEET OCCUPANT LOAD REQUIREMENTS OR WITH LOCAL APPROVAL, THE EXISTING RESTROOM FACILITIES ON SITE CAN BE USED.

MODULAR GENIUS

SMART BUILDING

GENERAL BUILDING INFORMATION:

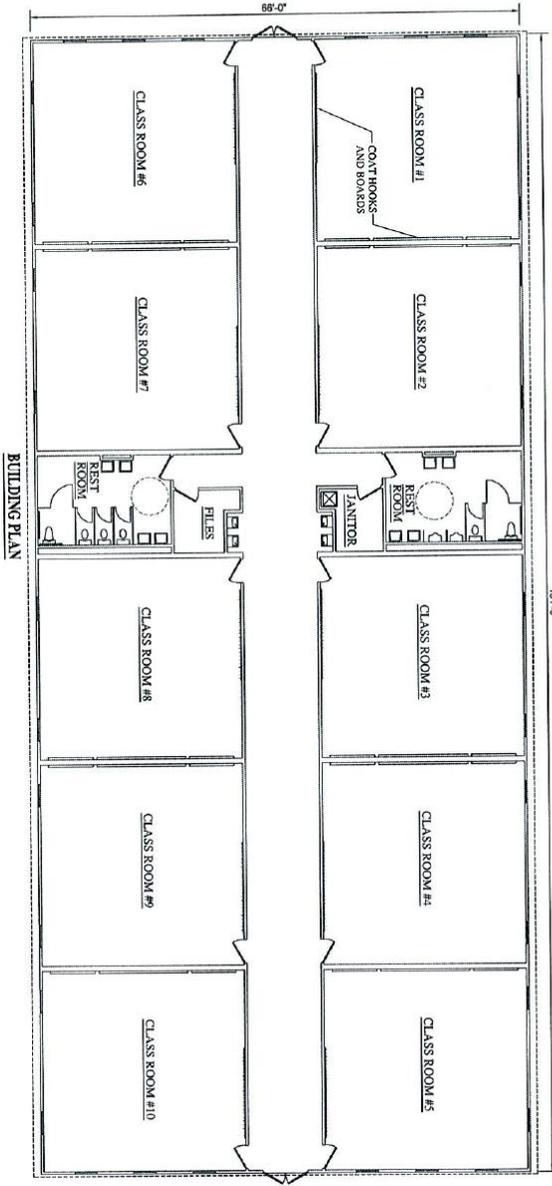
DRAWING NUMBER: GENIUS-001
 NO. OF BUILDINGS: 1
 BUILDING USE: EDUCATIONAL (E)
 SQUARE FOOTAGE: 15,466
 EDUCATIONAL (E)
 www.modulargenius.com
 (888)420-1113

GENERAL CODE INFORMATION:

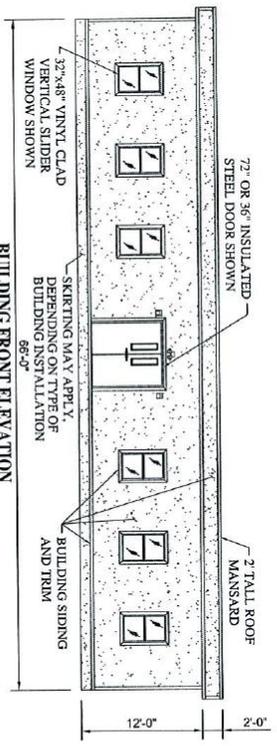
- THE MINIMUM AND MAXIMUM NUMBER OF WINDOWS AND DOORS CODE SHALL BE LIMITED. CONSIDERATION MAY BE TAKEN TO THE CODE REQUIREMENTS FOR ENERGY CONSERVATION.
- REQUIRED PLUMBING FIXTURES ARE SUBJECT TO THE ADOPTED PLUMBING CODE. CONSIDERATION MAY BE TAKEN FOR EXISTING RESTROOMS ON SITE. ALL BE LIMITED TO THE REQUIREMENTS OF THE ADOPTED BUILDING CODE.
- THE BUILDING SHALL BE SET WITH A PERMANENT OR TEMPORARY FOUNDATION SYSTEM AND APPROVED BY THE LOCAL OFFICIAL (HAVING JURISDICTION).
- THE FINAL LAYOUT IS SUBJECT TO REVIEW FOR COMPLIANCE WITH THE BUILDING CODE ENFORCED IN THE AREA THE BUILDING WILL BE OCCUPYING.

GENERAL DESIGN NOTES:

CLASS ROOMS, RESTROOMS, CLOSETS, BREAK ROOMS, CONFERENCE ROOMS AND OFFICES CAN BE ADDED TO MEET YOUR SPECIFIC SPACE REQUIREMENTS. WINDOWS AND DOORS CAN BE ADDED OR REMOVED BASED ON YOUR SITE REQUIREMENTS. MECHANICAL, ELECTRICAL, AND PLUMBING WILL BE SIZED TO MEET THE USE AND OCCUPANCY REQUIREMENTS.



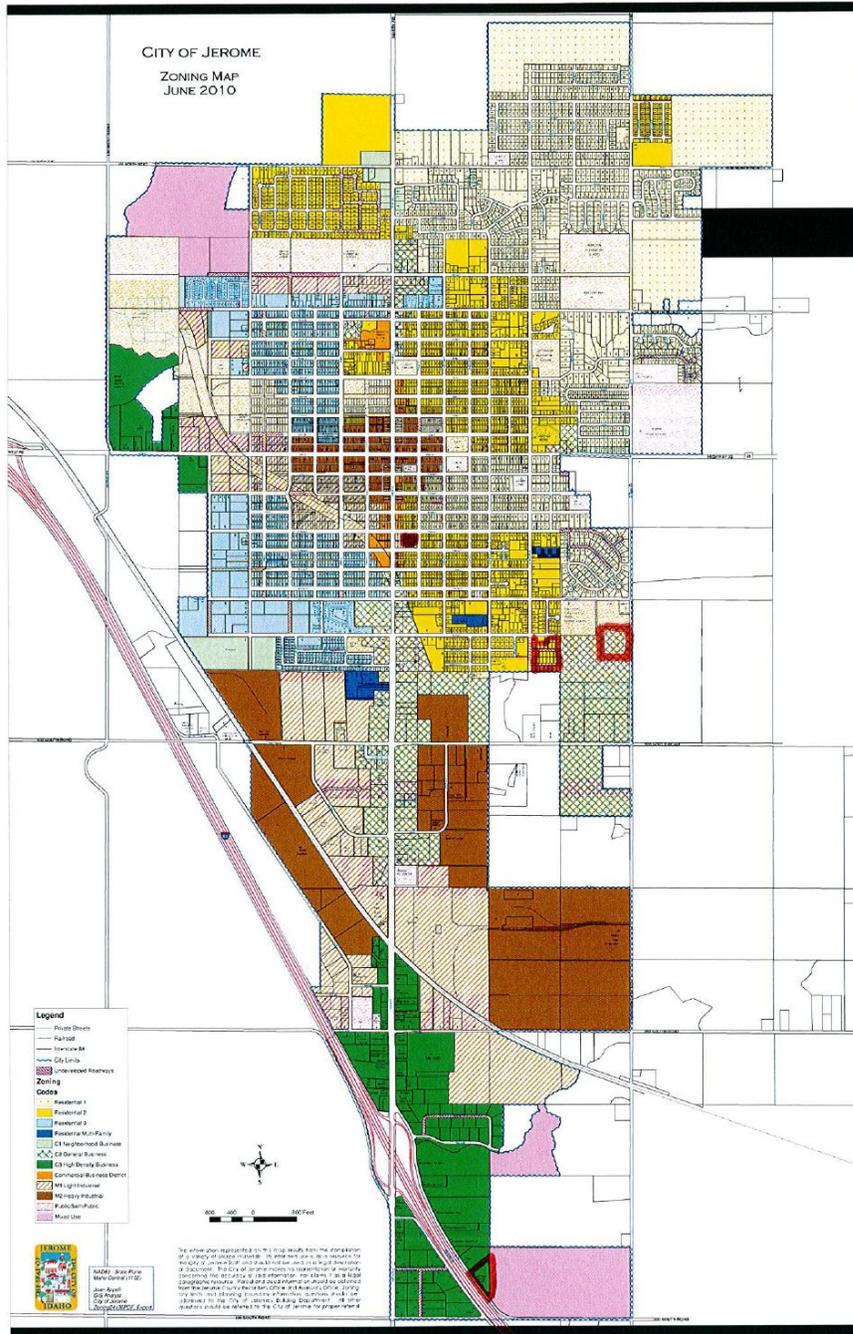
Optional Floor plan



ASK ABOUT GREEN, SUSTAINABLE BUILDING OPTIONS



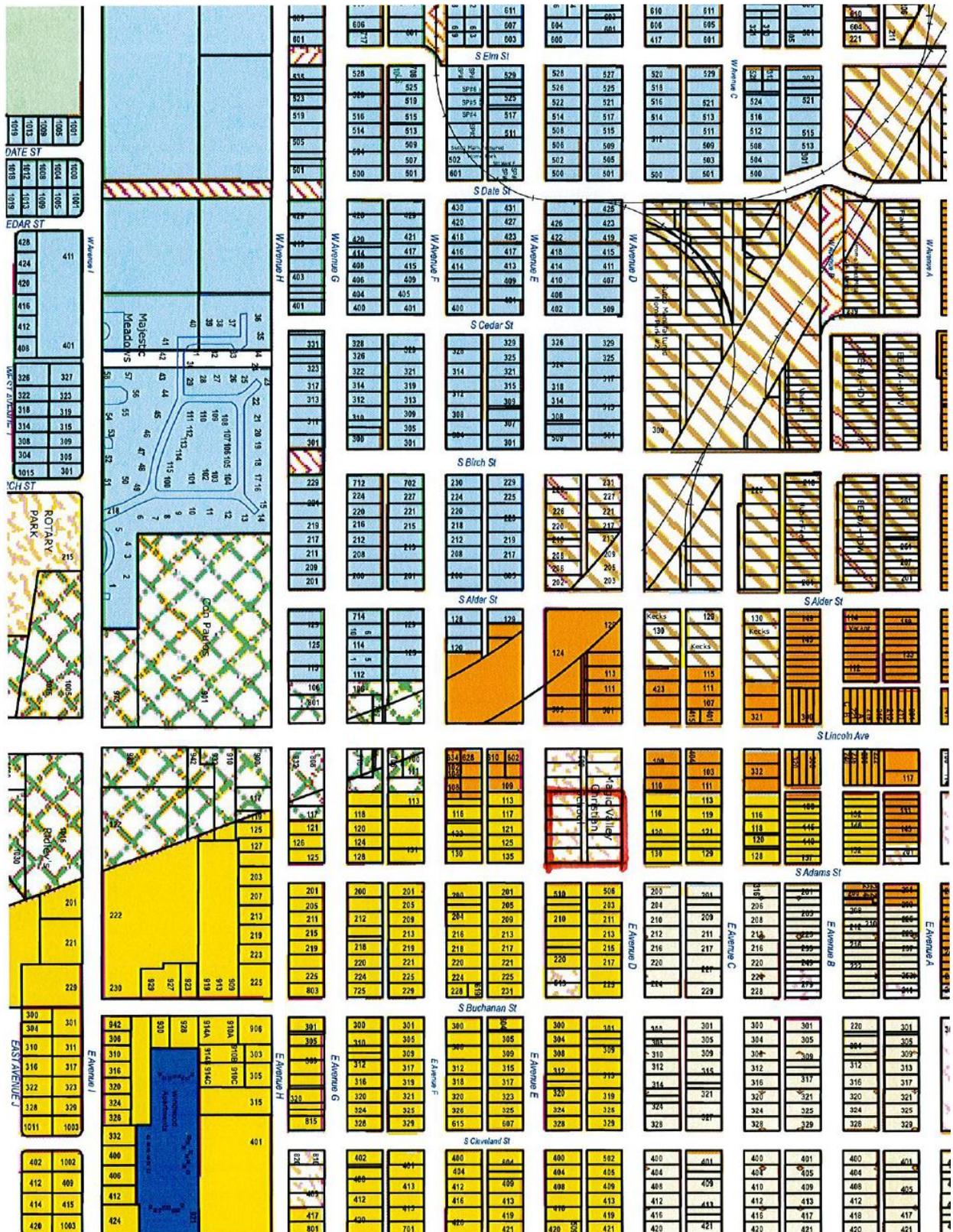
Appendix M – Supplemental Facility Information







Option 1



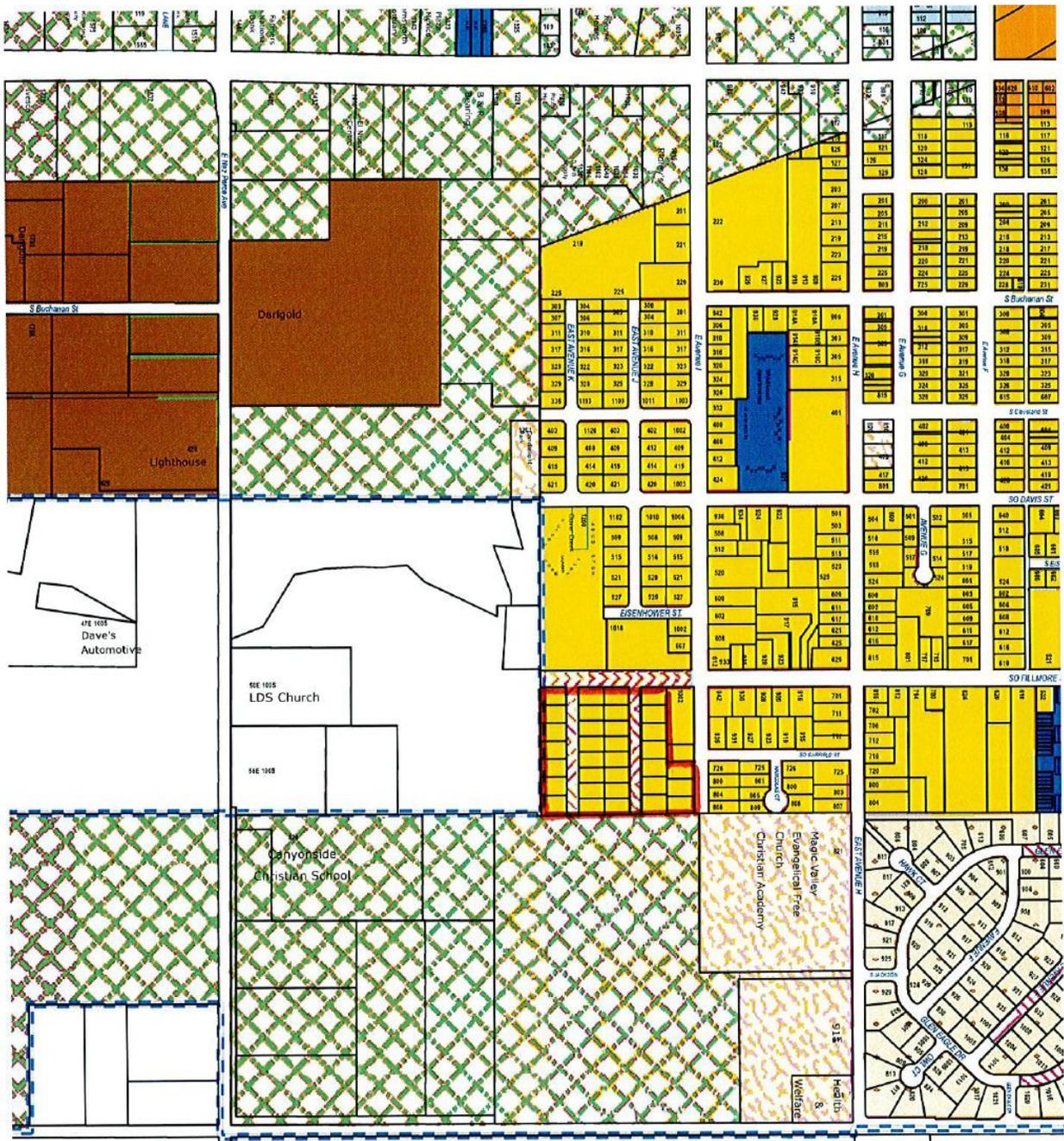








Option 3



Appendix N – Curriculum Selection

Curriculum Committee Process and Curriculum Selection

Heritage Academy will organize a Curriculum Committee to oversee the selection of appropriate curriculum. The Curriculum Committee will consist of qualified individuals with the knowledge and experience in this area of expertise.

Purpose

- To coordinate Heritage Academy curriculum and programs and establish alignment with SEM practices.
- To serve as a means of disseminating and collecting information by departments and/or grade levels.
- To coordinate the selection of textbooks.
- To periodically meet as the Leadership Team to discuss broader school issues.

Membership – Principal; Representative from the Board of Directors; Representative from the Parent Organization; Representative from Primary Grade Teachers (K-3); Representative from the Intermediate Grade Teachers (4-6); Representative from Secondary School Teachers (if applicable); Teachers representing the following core content areas (when applicable):

- Math
- Science
- Special Education
- Social Studies
- Reading
- English/Language Arts

Responsibilities

- To coordinate curriculum and programs within and across departments on a K-12 basis.
- To serve as the body that coordinates the textbook selection process.
- To provide for direct and effective communication on items related to the committee's responsibilities.
- To provide for communication to implement program revisions and changes.
- To meet quarterly to discuss curriculum alignment and implementation and make recommendations to the charter school administration and board of directors.

Initial Proposed Curriculum in the Core Content Areas

APPENDIX N – Proposed Core Content

In the curriculum research that the Heritage Academy Board has conducted, board members have spoken with specialists (Dr. Pat Schuler of Creative Insights; Dr. Caroline Cohen of University of Connecticut; and Dr. Terry Neu of Sacred Heart University) and they agree that forming a Curriculum Committee is the responsible approach concerning Heritage Academy's petition. In receiving further counsel from them, they concur with the current selection of curriculum (Saxon Math, Core Knowledge, FOSS Science, and Harcourt Reading or SEMR).