

CHARTER SCHOOL PERFORMANCE CERTIFICATE

This Performance Certificate (“Certificate”) is executed on **April 14, 2022**, by and between the Idaho Public Charter School Commission (the “Authorizer”) and **Heritage Academy, Inc.** (the “Charter Holder”) for the purpose of operating **Heritage Academy** (the “School”), an independent public school organized as an Idaho nonprofit corporation and established under the Public Charter Schools Act of 1998, Idaho Code section 33-5201 *et seq.*, as amended (the “Charter Schools Act”).

RECITALS

WHEREAS, the **Charter Holder** is a non-profit entity incorporated with a board of directors; and

WHEREAS, on **August 5, 2010**, the Authorizer approved the Charter Holder’s petition to establish a new charter school; and

WHEREAS, on **February 7, 2017**, the Authorizer conditionally renewed the School’s charter for a five-year term of operations to begin July 1, 2017 and end on June 30, 2022; and

WHEREAS, on **February 11, 2022**, the Authorizer renewed the School’s charter for a subsequent five-year term of operations to begin July 1, 2022 and end on June 30, 2027 with no conditions.

NOW THEREFORE in consideration of the foregoing recitals and the mutual understandings contained herein, the Authorizer and the **Charter Holder** agree as follows:

SECTION 1: TERMS OF AUTHORIZATION

- A. Establishment of School.** The Charter Holder is hereby authorized to implement at the School the program described in the Charter, attached to this Certificate as Appendix B and incorporated herein by this reference. Any significant changes to any section of the Charter, including the educational program, facilities plan, financial plan, or the management plan, during the School’s pre-operational period or first operational term shall be treated as an amendment in accordance with the Authorizer’s policy.
- B. Term of Agreement.** The School’s operational term shall be from July 1, **2022** and end on June 30, **2027**. Subsequent terms of operation may be issued by the Authorizer in accordance with Idaho Code and Authorizer policy.

SECTION 2: EDUCATIONAL PROGRAM

- A. School Mission.** The mission of the School is as follows:
Our school community brings together the resources necessary to help all students grow and succeed. Heritage Academy believes each student has gifts, talents and strengths. We embrace a diverse student body and commit to creating a nurturing and supportive school culture. Our school ensures that all students acquire the academic, interpersonal, critical thinking and problem-

solving skills and mindsets to succeed in school, career and life. Our goal is to enable students to become responsible, respectful and caring members of society.

- B. Grades Served.** The School may serve students in grades Kindergarten through 8.
- C. Design Elements.** The School shall implement and maintain the following essential design elements of its educational program:
 - i.** The School shall use the School Enrichment Model (SEM) to provide expanded educational opportunities for all students based on their strengths and interests in order to engage them in their learning, thereby raising expectations and achievement for all. The fundamental aspect of the SEM is Enrichment Clusters, where each student participates in at least one enrichment cluster per school year. Clusters last 6-12 weeks and typically meet once per week. Students work in small groups to produce products or services that solve real-world problems and benefit the students, their school, or the larger community. This shall be verified by observation of SEM Enrichment Clusters.
 - ii.** The School shall provide a strong Social Emotional Learning (SEL) program, including implementation of 7 Mindsets Program and a safe environment for students. This shall be verified by observation of curriculum and classroom observation.
 - iii.** The School shall provide a community school approach to meeting the needs of students and families. This shall be verified by observation and knowledge of programs implemented to meet student and family needs.
- D. Standardized Testing.** Students of the School shall be tested with the same standardized tests as other Idaho public school students.
- E. Accreditation.** The School shall be accredited as provided by rule of the State Board of Education. The School shall be accredited or appropriately credentialed by Cognia. All reports issued to the School from the accrediting agency shall be submitted to the Authorizer within five days of receipt.

SECTION 3: SCHOOL GOVERNANCE

- A. Governing Board.** The School shall be governed by a non-profit board of directors (the “Board”) incorporated by the Charter Holder. The Board shall serve as public agents authorized by the Authorizer, in a manner that is consistent with the terms of this Certificate, so long as such provisions are in accordance with state and federal laws, rules and regulations. The Board shall have final authority with respect to the School’s operation, and shall have the responsibility of overseeing academic achievement, financial stability, and operational management of the School. The Charter Holder shall also be responsible for maintaining and enforcing a compliant Board and providing overall Board stewardship for the School.
- B. Articles of Incorporation and Bylaws.** The articles of incorporation and bylaws of the Charter Holder shall provide for governance of the operation of the School as a nonprofit corporation and a public charter school, and shall at all times be consistent with all applicable laws, rules, regulations, and this Certificate. The Charter Holder shall notify the Authorizer of any modification to the articles of incorporation or bylaws within five business days of approval by the Charter Holder.
- C. Charter Board Composition.** The composition of the Board shall at all times be determined by

and consistent with the articles of incorporation and bylaws, and all applicable laws, rules, regulations, and policies. The Charter Holder shall notify the Authorizer of any changes to its composition and provide an amended School Leadership Roster within five business days of it taking effect.

SECTION 4: AUTHORIZER ROLE AND RESPONSIBILITIES

- A. Oversight Allowing Autonomy.** The Authorizer’s role shall be to evaluate the School’s performance outcomes according to this Certificate and the Performance Framework, and shall be to provide compliance oversight. The Authorizer shall comply with the provisions of the Charter Schools Act and the terms of this Certificate in a manner that does not unduly inhibit the autonomy of the School.
- B. Charter School Performance Framework.** The Charter School Performance Framework (“Performance Framework”) is attached and incorporated into this agreement as Appendix A. The Performance Framework shall be used to annually evaluate the School’s academic achievement, Board stewardship, operational management, and financial stability. The specific terms of the Performance Framework are determined by the Authorizer and shall be binding on the School.
- C. Separate Academic Evaluations.** The academic performance outcomes of the K-12 on-site programs operated by the School shall be aggregated across all grades for reportability. The aggregated K-12 on-site program, the virtual program, and the virtual-alternative program shall each be evaluated separately with regard to the academic section of the Performance Framework.
- D. Identified Comparison Group.** For purposes of evaluating the School against the metrics and measures established in the Performance Framework, the School’s comparison group shall be identified as described below and shall be established for the length of the Certificate term.
- i. The School’s comparison group shall include the following schools:
 - Heritage Community Charter School, #1343
 - Chief Tahgee Elementary, #1347
 - Bickel Elementary School, #0820
 - Central Elementary School, #0447
 - Lakeside Elementary School, #0752
 - Garfield Elementary School, #0303
- E. Authorizer to Monitor School Performance.** The Authorizer shall monitor and report on the School’s progress in relation to the indicators, measures, metrics, and targets set out in the Performance Framework. A formal report of the School’s academic, financial, and operational performance (“Performance Report”) shall be provided to the school and the public by the Authorizer annually. Data necessary to conduct this evaluation will be collected throughout the year. Additional reviews may be necessary if compliance concerns arise.
- F. School Performance.** The School shall meet standard on all measures of the Performance Framework. The Authorizer shall renew any charter in which the School met all the terms of its Certificate, including all appendices, at the time of renewal.
- G. Performance Framework as Basis for Renewal of Charter.** The School’s performance in relation to the Performance Framework, as reported in the annual Performance Report issued by

the Authorizer to the Charter Holder, shall provide the basis upon which the Authorizer shall decide whether to renew the School's Charter at the end of the Certificate term. The School's Performance Framework includes mission-specific measures, agreed to by the School and the Authorizer, and are incorporated in the Performance Framework.

- H. Required Reports.** The School shall prepare and submit reports as required by the Authorizer's policy.
- I. Authorizer's Right to Review.** The Authorizer maintains the right to request and review additional documentation if such becomes necessary in the course of regular oversight duties or to investigate the validity of a compliance concern. The Authorizer shall conduct its reviews in a manner that does not unduly inhibit the autonomy granted to the School.
- J. Site Visits.** The Authorizer may conduct site visits in accordance with the Authorizer's policy. Reports from any site visit shall be made available to the School and shall be included in the School's annual Performance Report.

SECTION 5: SCHOOL OPERATIONS

- A. In General.** The School and the Charter Holder shall operate at all times in accordance with all federal and state laws, rules, regulations, local ordinances, and Authorizer policies applicable to public charter schools.
- B. Maximum Enrollment.** The maximum number of students who may be enrolled in the School, across all programs, shall be 210.
- C. Equitable Enrollment Procedures.** The School shall make student recruitment, admissions, enrollment, and retention decisions in a nondiscriminatory manner and without regard to race, color, creed, national origin, sex, marital status, religion, ancestry, disability or need for special education services. In no event may the School limit admission based on race, ethnicity, national origin, disability, gender, income level, athletic ability, or proficiency in the English language. If there are more applications to enroll in the School than there are spaces available, the School shall select students to attend using a random selection process that shall be publicly noticed and open to the public.
 - i. Calendar.** The School shall operate on a traditional nine-month calendar in which the last day of the regular term shall fall on or before June 30.
 - ii.** The School will offer a summer school session for the purpose of acceleration and/or credit recovery.
- D. School Facilities.** The School shall operate at the following location(s): 500 S Lincoln Ave, Jerome, ID 83338. The School shall provide the Authorizer with facilities documentation, including occupancy permits, fire marshal reports, building inspection reports, and health department reports for any facility newly occupied by the School, and any remodeling or construction project for which such documentation is necessary in accordance with Authorizer policy and in accordance with law, rule, regulations, and authorizer policy.
- E. Attendance Area.** The School's primary attendance area shall be used for the purposes of determining applicability of this enrollment preference category.
 - i.** The School's primary attendance areas is as follows: North boundary: 900 North Rd; East boundary: 500 East Rd; South boundary: Golf Course Rd; West boundary: 500 West Rd.

- F. Staff.** Instructional staff shall be certified as provided by rule of the State Board of Education. All full-time staff members of the School shall be covered by the Public Employee Retirement System of Idaho, federal social security, unemployment insurance, worker's compensation insurance, and health insurance.
- G. Alignment with All Applicable Law.** The School shall comply with all applicable federal and state laws, rules, and regulations. In the event any such laws, rules, or regulations are amended, the School shall be bound by any such amendment upon the effective date of said amendment.

SECTION 6: SCHOOL FINANCE

- A. General.** The School shall comply with all applicable financial and budget laws, rules, regulations, and financial reporting requirements, as well as the requirements contained in the School's Performance Framework.
- B. Financial Controls.** At all times, the Charter Holder shall ensure that the School maintains appropriate governance, managerial procedures, and financial controls, which shall include, but not be limited to: (1) commonly accepted accounting practices and the capacity to implement them; (2) a checking account; (3) adequate payroll procedures; (4) procedures for the creation and review of monthly and quarterly financial reports, which procedures shall specifically identify the individual who will be responsible for preparing such financial reports in the following fiscal year; (5) internal control procedures for cash receipts, cash disbursements and purchases; and (6) maintenance of asset registers and financial procedures for grants, all in accordance with state and federal laws, rules, regulations, and Authorizer policy.
- C. Financial Audit.** The School shall submit audited financial statements from an independent auditor to the Authorizer no later than November 1 of each year.
- D. Annual Budgets.** The School shall adopt a budget for each fiscal year, prior to the beginning of the fiscal year. The budget shall be in the Idaho Financial Accounting Reporting Management Systems (IFARMS) format or any other format as may be reasonably requested by the Authorizer.

SECTION 7: TERMINATION, NON-RENEWAL AND REVOCATION

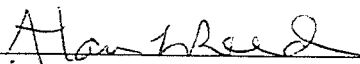
- A. Relinquishment.** Should the Charter Holder choose to relinquish its Charter before the expiration of this Certificate, it may do so upon written notice to the Authorizer. In such a case, the Authorizer's closure protocol shall begin immediately following written notification.
- B. Nonrenewal.** The Authorizer may non-renew the Charter at the expiration of the Certificate if the School failed to meet one or more of the terms of its Certificate, including the Performance Framework. The Charter Holder may appeal a decision to non-renew directly to the State Board of Education.
- C. Revocation.** The School's Charter may be revoked as provided by Idaho Code section 33-5209C. In such an event, the Authorizer shall consider whether to revoke the School's Charter at its next regularly scheduled meeting. The decision shall be made at that time. The Charter Holder may appeal a decision to revoke directly to the State Board of Education.
- D. Closure.** The Authorizer's closure protocol shall begin immediately after a decision to relinquish is made by the Charter Holder, or a decision to revoke or non-renew or is made by the Authorizer.

Closure protocol shall begin regardless of whether the Charter Holder appeals the decision. In the event that closure protocol begins, the School shall cease operations no later than the following June 30. Closure protocol shall only cease if the State Board of Education overturns the Authorizer's decision.

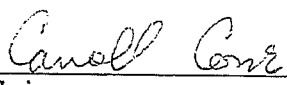
SECTION 8: MISCELLANEOUS

- A. No Employee or Agency Relationship.** None of the provisions of this Certificate will be construed to create a relationship of agency, representation, joint venture, partnership, ownership, or employment between the Authorizer and the School.
- B. Additional Services.** Except as may be expressly provided in this Certificate, as set forth in any subsequent written agreement between the School and the Authorizer, or as may be required by law, neither the School nor the Authorizer shall be entitled to the use of or access to the services, supplies, or facilities of the other.
- C. No Third-Party Beneficiary.** This Certificate shall not create any rights in any third parties, nor shall any third party be entitled to enforce any rights or obligations that may be possessed by either party to this Certificate.
- D. Amendment.** This Certificate may be amended by agreement between the School and the Authorizer in accordance with Authorizer policy. All amendments must be in writing and signed by the School and the Authorizer.

IN WITNESS WHEREOF, the Authorizer and the Charter Holder have executed this Performance Certificate to be effective April 14, 2022.



Chairman
Idaho Public Charter School Commission



Chairman
Heritage Academy, Inc. Governing Board

Appendix A: Performance Framework

Appendix B: Charter

Appendix A: Performance Framework



Idaho Public Charter School Commission

304 North 8th Street, Room 242

Boise, Idaho 83702

Phone: (208)332-1561

pcsc@osbe.idaho.gov

Alan Reed, Chairman

Jenn Thompson, Director

ACADEMIC MEASURES

All School Measures

1. Math Proficiency
2. ELA Proficiency
3. Math Growth
4. ELA Growth
5. Literacy Proficiency

1. MATH PROFICIENCY

Proficiency Rate: The PCSC will use the proficiency rates as determined by the Idaho Accountability Framework and reported via the Idaho Report Card.

Math and ELA Proficiency Rubric	
Exceeds Standard	The school's proficiency rate is greater than one standard deviation above the mean of the identified comparison group, or the school's proficiency average is in 90 th percentile of all Idaho schools.
Meets Standard	The school's proficiency rate is equal to the mean or falls between the mean and one standard deviation above the mean of the identified comparison group.
Approaches Standard	The school's proficiency rate falls between the mean and one standard deviation below the mean of the identified comparison group.
Does Not Meet Standard	The school's proficiency rate is more than one standard deviation below the mean of the identified comparison group, OR the school has been identified for comprehensive or targeted support for three consecutive years as per the Idaho Consolidated Plan.

2. ELA PROFICIENCY

Proficiency Rate: The PCSC will use the proficiency rates as determined by the Idaho Accountability Framework and reported via the Idaho Report Card.

Math and ELA Proficiency Rubric	
Exceeds Standard	The school's proficiency rate is greater than one standard deviation above the mean of the identified comparison group, or the school's proficiency average is in 90 th percentile of all Idaho schools.
Meets Standard	The school's proficiency rate is equal to the mean or falls between the mean and one standard deviation above the mean of the identified comparison group.
Approaches Standard	The school's proficiency rate falls between the mean and one standard deviation below the mean of the identified comparison group.
Does Not Meet Standard	The school's proficiency rate is more than one standard deviation below the mean of the identified comparison group, OR the school has been identified for comprehensive or targeted support for three consecutive years as per the Idaho Consolidated Plan.

3. MATH GROWTH

Growth Rate: The PCSC will use the proficiency rates as determined by the Idaho Accountability Framework and reported via the Idaho Report Card.

Growth Rubric Math	
Exceeds Standard	The percentage of students in grades 3-8 who did not achieve proficiency on the current year's assessment but who did make adequate growth toward proficiency is greater than one standard deviation above the mean of the identified comparison group, OR the school's growth rate is in the 90 th percentile of all Idaho public schools.
Meets Standard	The percentage of students in grades 3-8 who did not achieve proficiency on the current year's assessment but who did make adequate growth toward proficiency is equal to the mean or falls between the mean and one standard deviation above the mean of the identified comparison group, OR the growth rate increased by at least 10% over the previous year.
Approaches Standard	The percentage of students in grades 3-8 who did not achieve proficiency on the current year's assessment but who did make adequate growth toward proficiency falls between the mean and one standard deviation below the mean of the identified comparison group.
Does Not Meet Standard	The percentage of students in grades 3-8 who did not achieve proficiency on the current year's assessment made adequate growth toward proficiency is more than one standard deviation below the mean of the identified comparison group.

4. ELA GROWTH

Growth Rate: The PCSC will use the proficiency rates as determined by the Idaho Accountability Framework and reported via the Idaho Report Card.

Growth Rubric ELA	
Exceeds Standard	The percentage of students in grades 3-8 who did not achieve proficiency on the current year's assessment but who did make adequate growth toward proficiency is greater than one standard deviation above the mean of the identified comparison group, OR the school's growth rate is in the 90 th percentile of all Idaho public schools.
Meets Standard	The percentage of students in grades 3-8 who did not achieve proficiency on the current year's assessment but who did make adequate growth toward proficiency is equal to the mean or falls between the mean and one standard deviation above the mean of the identified comparison group, OR the growth rate increased by at least 10% over the previous year.
Approaches Standard	The percentage of students in grades 3-8 who did not achieve proficiency on the current year's assessment but who did make adequate growth toward proficiency falls between the mean and one standard deviation below the mean of the identified comparison group.
Does Not Meet Standard	The percentage of students in grades 3-8 who did not achieve proficiency on the current year's assessment made adequate growth toward proficiency is more than one standard deviation below the mean of the identified comparison group.

5. LITERACY PROFICIENCY

Literacy Proficiency Rate: The PCSC will use the proficiency rates as determined by the Idaho Accountability Framework and reported via the Idaho Report Card.

Literacy Proficiency Rubric	
Exceeds Standard	One of the following is true: <ul style="list-style-type: none">• The school's proficiency rate on the spring administration of the statewide literacy assessment is greater than one standard deviation above the mean of the identified comparison group;• the school's proficiency rate on the spring administration of the statewide literacy assessment is at or above 90%; OR• The fall to spring change in proficiency rate is 20% or greater.
Meets Standard	The school's proficiency on the spring administration of the statewide literacy assessment is equal to the mean or within one standard deviation above the mean of the identified comparison group; OR the school's fall to spring change in proficiency rate is between 10%-19%.
Approaches Standard	The school's proficiency on the spring administration of the statewide literacy assessment falls within one standard deviation below the mean of the identified comparison group.
Does Not Meet Standard	The school's proficiency rate on the spring administration of the statewide literacy assessment is more than one standard deviation below the mean of the identified comparison group.

OPERATIONAL MEASURES

BOARD STEWARDSHIP

1. Governance Structure
2. Governance Oversight
3. Governance Compliance

OPERATIONAL MANAGEMENT

4. Student Services
5. Data Security and Information Transparency
6. Facility and Services
7. Operational Compliance

BOARD GOVERNANCE

1. Governance Structure Rubric

Data Sources: Board bylaws, articles of incorporation, and any courtesy letters or notifications issued to the school by entities responsible for oversight or enforcement.

Governance Structure Rubric	
Exceeds Standard	The school has met standard for 3 or more consecutive years, including the most recently completed school year.
Meets Standard	Board Bylaws are compliant with ID law. Articles of Incorporation are current. No investigations were conducted into either ethical behavior or conflict of interest regarding any board director. The board did not experience an Open Meeting Law violation that needed to be cured this year.
Approaches Standard	The school was informed of or became aware of non-compliance and action to correct the issue was taken within 30 days.
Does Not Meet Standard	The school was informed of or became aware of non-compliance and action to correct the issue was not taken within 30 days.

2. Governance Oversight Rubric

Data Sources: Board meeting minutes, school policies, continuous improvement plan (or other strategic planning evidence if submitted by the school), and verification of submission of annual administrator evaluation.

Governance Oversight Rubric	
Exceeds Standard	The school has met standard for 3 or more consecutive years, including the most recently completed school year.
Meets Standard	The board reviews academic data in a timely and thorough manner. The board reviews financial reports in a timely and thorough manner. The board maintains compliant policies. The board engages in strategic planning. The board conducts a compliant annual evaluation of their school leader and/or management organization.
Approaches Standard	The school was informed of or became aware of non-compliance and action to correct the issue was taken within 30 days.
Does Not Meet Standard	The school was informed of or became aware of non-compliance and action to correct the issue was not taken within 30 days.

3. Governance Compliance Rubric

Data Sources: If applicable, courtesy letters/notifications of concerns, investigation, or findings issued to the school by entities responsible for oversight or enforcement, and any documentation of correction provided by the school.

Governance Compliance Rubric	
Exceeds Standard	The school has met standard for 3 or more consecutive years, including the most recently completed school year.
Meets Standard	The PCSC did not issue any courtesy letters or notify an external investigative body of compliance concerns this year.
Approaches Standard	The school was informed of or became aware of non-compliance and action to correct the issue was taken within 30 days.
Does Not Meet Standard	The school was informed of or became aware of non-compliance and action to correct the issue was not taken within 30 days.

OPERATIONAL MANAGEMENT

4. Student Services Rubric

Data Sources: If applicable, any notifications or courtesy letters issued by the SDE or SBOE which required corrective action with regard to the school's ELL, SPED, or College and Career Readiness programs, as well as any documentation submitted by the school evidencing correction.

Student Services Rubric	
Exceeds Standard	The school has met standard for 3 or more consecutive years, including the most recently completed school year.
Meets Standard	All of the following are true: <ul style="list-style-type: none">• The school's English Language Learner program is in good standing;• The school's Special Education program is in good standing;The school's college and career readiness program is in good standing; and• The school's federal programs are in good standing.
Approaches Standard	The school was informed of or became aware of non-compliance and action to correct the issue was taken within 30 days.
Does Not Meet Standard	The school was informed of or became aware of non-compliance and action to correct the issue was not taken within 30 days.

5. Data Security and Information Transparency Rubric

Data Sources: periodic desk audit of school website, and any formal notifications regarding data security or public records compliance.

Data Security and Information Transparency Rubric	
Exceeds Standard	The school has met standard for 3 or more consecutive years, including the most recently completed school year..
Meets Standard	The school's website is compliant with I.C. 33-133(7) (data collection, access, and security policy); I.C. 33-320 (continuous improvement plan); and I.C. 33-357 (expenditures updated monthly, contracts, performance reports, and annual budgets). The school did not experience any issues involving data security this year. The school did not experience any compliance issue regarding public records requests this year.
Approaches Standard	The school was informed of or became aware of non-compliance and action to correct the issue was taken within 30 days.
Does Not Meet Standard	The school was informed of or became aware of non-compliance and action to correct the issue was not taken within 30 days.

6. Facility and Services Rubric

Data Sources: Verification of meal service program and transportation services via public documents and/or school website, and any notifications of concerns regarding occupancy or safety issued to the school by entities responsible for oversight or enforcement.

Facility and Building Services Rubric	
Exceeds Standard	The school has met standard for 3 or more consecutive years, including the most recently completed school year.
Meets Standard	The school's occupancy certificate is current. The school maintains current safety inspections and drills. The school provides daily transportation to students in compliance with Idaho Code. The school provides a compliant lunch program.
Approaches Standard	The school was informed of or became aware of non-compliance and action to correct the issue was taken within 30 days.
Does Not Meet Standard	The school was informed of or became aware of non-compliance and action to correct the issue was not taken within 30 days.

7. Operational Compliance Rubric

Data Sources: Periodic observation of enrollment lottery, and if applicable, any corrective action plans issued by the SDE not related to special education, ELL, or college and career readiness (as these are captured elsewhere), or formal notification of late reports or enrollment violations.

Operational Compliance Rubric	
Exceeds Standard	The school has met standard for 3 or more consecutive years, including the most recently completed school year.
Meets Standard	Required reports are submitted accurately and on time. The school maintains a compliant enrollment process. No correct action plans were issued by the SDE this year.
Approaches Standard	The school was informed of or became aware of non-compliance and action to correct the issue was taken within 30 days.
Does Not Meet Standard	The school was informed of or became aware of non-compliance and action to correct the issue was not taken within 30 days.

FINANCIAL MEASURES

NEAR TERM HEALTH

1. Current Ratio
2. Unrestricted Days Cash
3. Default
4. Enrollment Variance

SUSTAINABLE HEALTH

5. Total Margin and 3Yr Aggregated Total Margin
6. Cash Flow and Multi-Year Cash Flow
7. Debt Service Coverage Ratio
8. Debt to Asset Ratio
9. Financial Compliance Rubric

NEAR-TERM HEALTH

1. Current Ratio

Calculation: Current Assets divided by Current Liabilities

Data Source: Annual Fiscal Audit Report

Current Ratio Rubric	
Exceeds Standard	The school has a current ratio of more than 1.5
Meets Standard	The school has a current ratio of at least 1.1 (or between 1.0 and 1.1 with a 1-year positive trend)
Approaches Standard	The school has a current ratio of between .9 and 1.0 (or between 1.0 and 1.1 with a 1-year negative trend)
Does Not Meet Standard	The school has a current ratio of .9 or less.

2. Unrestricted Days Cash

Calculation: Unrestricted Cash and investments divided by ((Total Expenses minus Depreciation Expense) / 365)

Data Source: Annual Fiscal Audit Report

Unrestricted Days Cash Rubric	
Exceeds Standard	The school has more than 60 days cash on hand
Meets Standard	The school has 60 days cash OR between 30- and 60-days cash and one-year trend is positive. Note: Schools in their first or second year of operation must have a minimum of 30 days cash.
Approaches Standard	The school has between 15-30 days cash OR between 30-60 days cash, but one-year trend is negative.
Does Not Meet Standard	The school has fewer than 15 days cash on hand.

3. Default

Calculation: No calculation.

Data Source: Annual Fiscal Audit Report, Terms of Debt, Other Formal Notifications Received by School.

Default Rubric	
Exceeds Standard	The school has met standard for at least 3 consecutive years, including the most recently completed school year.
Meets Standard	The school is not in default of any financial obligations and did not experience any instances of default during the fiscal year. Financial obligations include, but are not limited to, making payments to vendors and utility services on time, complying with all loan covenants, filing any reports required for maintenance of grants or philanthropic funds, meeting all tax obligations, and operating without financial judgements or property liens.
Approaches Standard	The school experienced one or more instances of minor default during the fiscal year (such as making late payments); however, the school is not currently in default of any financial obligations.
Does Not Meet Standard	School is currently in default of financial obligations.

4. Enrollment Variance

Calculation: Actual enrollment as of the first Friday in November (drawn from ISEE) divided by enrollment projections as submitted directly to the IPCSC in July.

Data Source: ISEE and direct school report

Enrollment Variance Rubric	
Exceeds Standard	The school has met standard for at least 3 consecutive years, including the most recently completed school year.
Meets Standard	Enrollment variance is equal to or greater than 95%.
Approaches Standard	Enrollment variance was between 90% and 95%, OR the enrollment variance was less than 90% and the school provided a mid-year amended budget evidencing at least a break-even budget based on mid-term enrollment and any resulting revenue adjustments.
Does Not Meet Standard	Enrollment variance was less than 90% and the school did not provide evidence of mid-year budget amendments or operational changes evidencing at least a break-even budget based on mid-term enrollment and any resulting revenue adjustments.

SUSTAINABLE HEALTH

5. Total Margin and 3Yr Aggregated Total Margin

Calculation:

Most Recent Year Total Margin: 2019 Net Income divided by 2019 Total Revenue.

3-Year Aggregated Total Margin: (2019 Net Income +2018 Net Income +2017 Net Income) divided by (2019 Total Revenue +2018 Total Revenue +2017 Total Revenue)

Data Source: Annual Fiscal Audit Report

Total Margin and 3-Yr Aggregated Total Margin	
Exceeds Standard	The school has met standard for 3 or more consecutive years, including the most recently completed school year..
Meets Standard	Aggregated 3-year Total Margin is positive and the most recent year Total Margin is positive OR Aggregated 3-Year Total Margin is greater than -1.5 percent, the trend is positive for the last two years, and the most recent year Total Margin is positive. Note: For schools in their first or second year of operation, the cumulative Total Margin must be positive.
Approaches Standard	Aggregated 3-Year Total Margin is greater than -1.5 percent, but trend does not "Meet Standard".
Does Not Meet Standard	Aggregated 3-Year Total Margin is less than or equal to -1.5 percent OR the most recent year Total Margin is less than -10 percent.

6. Cash Flow and Multi-Year Cash Flow

Calculation (example years are included as reference):

Most Recent Year Cash Flow: 2020 Cash and Investments minus 2019 Cash and

Investments Previous Year Cash Flow: 2019 Cash and Investments minus 2018

Cash and Investments Multi-Year Cash Flow: 2020 Cash and Investments minus

2018 Cash and Investments

Data Source: Annual Fiscal Audit Report

Cash Flow and Multi-Year Cash Flow	
Exceeds Standard	The school has met standard for 3 or more consecutive years, including the most recently completed school year..
Meets Standard	Multi-Year Cumulative Cash Flow is positive, and Cash Flow is positive in the most recent year is positive, OR Multi-Year Cumulative Cash Flow is negative, but documentation identifies this as a result of a one-time, planned purchase (such as a facility remodel). Note: Schools in their first or second year of operation must have positive cash flow.
Approaches Standard	Multi-Year Cumulative Cash Flow is positive, but Cash Flow is negative in the most recent year.
Does Not Meet Standard	Multi-Year Cumulative Cash Flow is negative, and no documentation identifies this as a result of a one-time, planned purchase.

7. Debt Service Coverage Ratio

Calculation:

If school owns its facility or if the school leases its facility and the lease is capitalized:
(Net Income + Depreciation Expense + Interest Expense) divided by (Principal + Interest + Lease Payments)

If school leases its facility and the lease is not capitalized: (Facility Lease Payments + Net Income + Depreciation Expense + Interest Expense) divided by (Principal + Interest + Lease Payments)

Data Source: Annual Fiscal Audit Report

Debt Service Coverage Ratio Rubric

Exceeds Standard	The school's debt service coverage ratio is 1.5 or greater OR the school operates debt-free.
Meets Standard	Debt Service Coverage Ratio is between 1.1 and 1.49
Approaches Standard	The school's debt service coverage ratio is between .9 and 1.09
Does Not Meet Standard	Debt Service Coverage Ratio is less than .9

8. Debt to Asset Ratio

Calculation: Total Liabilities divided by Total Assets

Data Source: Annual Fiscal Audit Report

Debt to Asset Ratio

Exceeds Standard	The school has met standard for 3 consecutive years, including the most recently completed school year., OR the school operates debt-free.
Meets Standard	The school's Debt to Asset Ratio is less than 0.9
Approaches Standard	The school's Debt to Asset Ratio is between 0.9. and 1.0
Does Not Meet Standard	The school's Debt to Asset Ratio is greater than 1.0

9. Financial Compliance Rubric

Calculation: Total Liabilities divided by Total Assets

Data Source: Annual Fiscal Audit Report, Desk Audit of Policies, Other Formal Notifications Received by School

Financial Compliance Rubric	
Exceeds Standard	The school has met standard for 3 or more consecutive years, including the most recently completed school year..
Meets Standard	Accounting Practices: finances are managed in compliance with GAAP. Financial Transparency: expenditures and contracts are posted on the school's site. Internal Controls: the school's internal controls are compliant.
Approaches Standard	The school was informed of non-compliance with accounting practices, financial transparency, or internal controls, and prompt action to correct is in evidence.
Does Not Meet Standard	The school is operating under a notification of fiscal concern or a notification of possible or imminent closure OR the school was informed of non-compliance with accounting practices, financial transparency, or internal controls and the issues were not corrected within 30 days.

Appendix B: Charter

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

Authorized Representative: Kelly Bangerter

500 South Lincoln

Jerome, ID 83338

(208) 595-1619

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

Mission: Our school community brings together the resources necessary to help all students grow and succeed.

Vision:

Heritage Academy believes each student has gifts, talents and strengths. We embrace a diverse student body and commit to creating a nurturing and supportive school culture.

Our school ensures that all students acquire the academic, interpersonal, critical thinking and problem-solving skills and mindsets to succeed in school, career and life.

Our goal is to enable students to become responsible, respectful and caring members of society.

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. We Project full enrollment of one class per grade in grades K-4 and one combined class of 25 for 5th and 6th grade. Heritage Academy in year two will increase the Kindergarten class size to a cap of 25 students in the A.M. class and cap of 25 students in the P.M. class. Heritage Academy, starting in year two, will also have the option to add one additional class per year starting with grade 1, if the application numbers justify these additions in grades 1-6, with a cap of 25 students per class. As enrollment numbers increase, Heritage Academy will expand the grade offering to grades K-8 in subsequent years as determined by the board of directors, and as application numbers justify these additional grades. In the 7th and 8th grades, Heritage Academy will have a cap of 50 students per grade. As Heritage Academy's program matures, and in the event it is in the best interest of Heritage Academy, the board may seek approval from the IPCSC to serve additional grades.

The School's primary attendance area is as follows:

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

East Boundary: 500 East Road

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

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

Distinguishing Features

Use the School Enrichment Model (SEM) to provide expanded educational opportunities for all students based on their strengths and interests in order to engage them in their learning, thereby raising expectations and achievement for all. The fundamental aspect of the SEM is Enrichment Clusters.

- Each student participates in at least one enrichment cluster per school year. Clusters last 6-12 weeks, and typically meet once per week.
 - Students work in small groups to produce products or services that solve real-world problems and benefit the students, their school, or the larger community.
-

Strong Social Emotional Learning (SEL) program

- Implementation of 7 Mindsets Program
- Safe environment
- Students are provided with a safe school facility.
- Students have access to adults willing to listen and protect students' safety.
- Students are provided with education and tools to encourage safe behavior among themselves.
- A strong, anti-bullying policy will be enforced.

Community School Approach to Meeting the Needs of Students and Families

- Community partnerships developed to support students and families
- Social, emotional and academic needs of students and families are addressed as part of a comprehensive approach to helping students succeed in school and in life.

Potential Impact on District

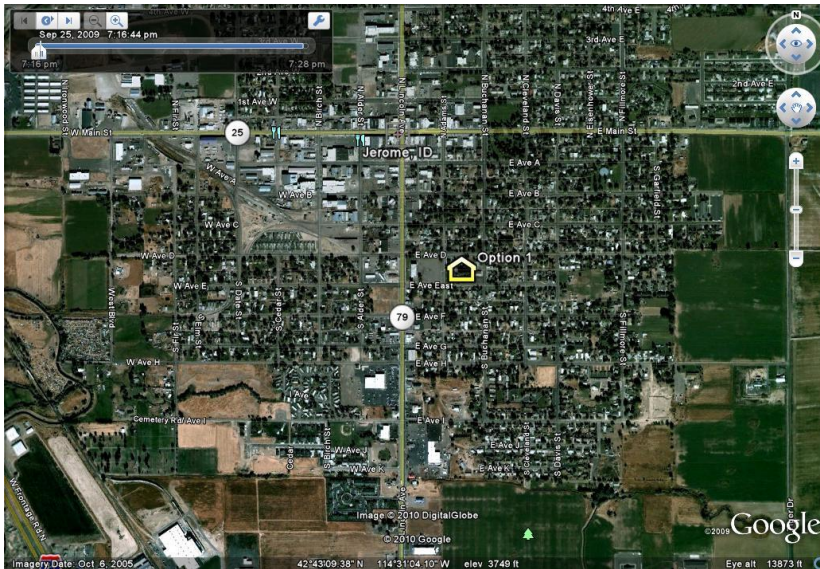
No funding for Heritage Academy will be provided by Jerome School District or any other individual traditional school district funds. Jerome School District has the capacity to acquire additional funding through levies and bonds, regardless of the student population. While Jerome School District will 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 below). 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 2011, 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 an excellent access (ingress/egress) for residents in our community.



Administrative Services

Instructional Leader

Heritage Academy recognizes the Administrator as the key leader responsible for implementing institutional procedures and policies. The Administrator 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 Administrator.

Administrator'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
 - 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 Administrator 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 Administrator 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 administrator 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 Administrator position will be evaluated semi-annually by the Board, based on mutually agreed upon metrics and criteria.

Special Education Coordinator

Heritage Academy will hire the appropriate special education staff as indicated by the needs of the enrolled student population. 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 teacher will provide support and training (or coordinate trainings) for Heritage Academy's Administrator and staff 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 be 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 Administrator, 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 Administrator 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 Administrator 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 Administrator 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. Heritage Academy has chosen to use Integrity Initiatives which emphasizes character traits of integrity. 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 mini-courses, 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 (1988), 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 Clusters are facilitated by teachers, parents or community resource persons who share the same interests of the students and have some degree of expertise in the subject they are facilitating. Enrichment Cluster sessions will take place at least one time during each school year. Enrichment Cluster sessions will be approximately six to twelve weeks in length. The Enrichment Clusters offered each session will have approximately the same time requirements so as to facilitate the least intrusion of regular instructional time. The students will receive extra support and guidance in selecting activities and projects from parents, teachers and the Administrator.

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 safe 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.
Standard 2: Educators are empowered to maintain classroom discipline.	Create a positive teaching and learning environment with an emphasis on high expectations of behavior and academic performance.	Heritage Academy will: <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.
Standard 3: The basic values of honesty, self-discipline, unselfishness, respect for authority, and the central importance of work are emphasized.	Offer opportunities for students to develop and express exemplary character traits in concert with the overall educational program.	Heritage Academy will: <ol style="list-style-type: none"> 1. Utilize integrity initiatives 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 instills a sense of individual, social,

		and civic responsibility and enables the student to use newly found knowledge to solve community problems.
Standard 4: The skills necessary to communicate effectively are taught.	Teach students a range of effective communication skills appropriate for the 21 st century.	Heritage Academy will: <ol style="list-style-type: none"> 1. Emphasize meaningful language experience in language arts, enhanced by writing and memorization. 2. Provide access to computers to teach students basic computer skills and, in the older grades, appropriate communication through technology (via e-mail and the internet).
Standard 5: A basic curriculum necessary to enable students to enter academic or professional-technical post-secondary educational programs is provided.	Develop an educated citizenry for the 21 st century through a proven academic program where all students are offered an advanced curriculum.	Heritage Academy will: <ol style="list-style-type: none"> 1. Use the Idaho State Standards as a starting point to be enhanced by unifying themes and other creative methods. 2. Offer a solid health curriculum as required by the state.
Standard 6: The skills necessary for the students to enter the workforce are taught	Provide students with the intellectual foundation and strong moral compass that provide the character traits of leadership, which lead them to becoming productive	Heritage Academy will: <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

	citizens.	<p>of technology as a toll in the workplace of the 21st century.</p> <ol style="list-style-type: none"> 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.
Standard 7: The students are introduced to current technology.	Provide students with a technology environment using tools such as computers, scientific equipment, and networks linked to local and nationwide resources.	<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 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. 3. Use computers as tools for such activities as accessing research information, authoring, computation, record keeping, data

		storage, and communication.
Standard 8: The importance of students acquiring the skills to enable them to be responsible citizens of their homes, schools, and communities is emphasized.	Provide students with the skills and the intellectual foundation to become responsible citizens in our society.	Heritage Academy will: <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. The Parent & Student Handbook will be distributed to all families which clearly identifies behavior expectations, consequences and other applicable policies. Parents and students will sign a contract agreeing to abide by the policies found within the Parent & Student Handbook. Students, teachers, Administrators, and parents will be expected to work together in an environment of mutual respect. Heritage Academy has chosen to use Integrity Initiatives which emphasizes character traits of integrity. 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. 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 and accountability. 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 assessments, 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
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 as necessary in accordance with I.C. 33-5203(3)(e) & IDAPA 08.02.140.

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 would 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 & Administrator; Relationship](#)

As noted above, the Board of Directors' role is to manage the property, affairs, and business of Heritage Academy. The Administrator is accountable to the Board of Directors and is responsible for and empowered to oversee the day-to-day operations of the school. The Administrator'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
 - 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 Administrator.

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 Teacher 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 Teacher Organization. Every member of the Heritage Academy Parent Teacher Organization will:

- Elect a formal Parent Teacher Organization executive committee, electing a President, Vice-President, Secretary and Treasurer. The Parent Teacher 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 Teacher 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 Committees. 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 requests that parents donate a minimum of thirty-five hours of volunteer time per year. Any questions regarding this policy should be directed to the Administrator. 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 Administrator 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").

Tab 7: Admission & Disciplinary Procedures

Projected Enrollment Capacity

The maximum number of students who may be enrolled in the school shall be 207 students. The maximum number of students who may be enrolled per class/grade level shall be as follows: 20 students per grade level in kindergarten, 1st, and 2nd grade; 22 students in 3rd grade; 25 students in grades 4-8.

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 the Parent & Student handbook which clearly identifies behavior expectations, consequences and other applicable policies. The handbook will include official notification of disciplinary rules. Parents/Guardians and students 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. (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: Administrator-intervention.
- Step 3: Suspension with parental notification, three (3) days. Re-admission will be allowed after a conference with student, parents/guardian, and administrator.

Step 4: Suspension with parental notification, five (5) days. Re-admission will be allowed after a hearing within five (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 re-enroll, the parent or legal guardian may reapply and enter the lottery process again only if the student was not expelled for violation of school policies or other serious disciplinary problems. All other students wanting to re-enroll 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, Incurrigibility & 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 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

The Parent & Student Handbook will be distributed to all families which clearly identifies behavior expectations, consequences and other applicable policies. To ensure parents/guardians have access to the Parent & Student Handbook, it will be included as part of each student’s registration packet, and posted on the school website. (A draft Student Handbook is attached in Appendix F.) Before any registration packet will be deemed “complete,” parents/guardians and students 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 Administrator will determine the school calendar, schedule, and hours of

operation. Within that general format, the Administrator, 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 Administrator and supplemented by other contracted services as needed. Annual programmatic and financial reports will be presented to the Board. The Administrator 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 Administrator 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 arrangements are made, the Administrator 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

Since studies have shown that school meal programs are essential to academic achievement, Heritage Academy will provide breakfast through the National School Breakfast Program, and lunch through the National School Lunch Program. These programs provide nutritionally balanced, low-cost or free lunches to children each school day. 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*.