

# Idaho Public Charter School Commission

## Annual Performance Report 2020

### PCSC School: Heritage Academy

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

<b>School Location:</b>	500 S. Lincoln Ave Jerome, Idaho, 83338
<b>School Phone:</b>	(208) 595-1617
<b>Comparison Group:</b>	<i>Heritage Community Charter School (1343); Chief Tahgee Elementary (1347); Bickel Elementary School (0820); Central Elementary (0447); Lakeside Elementary (0752); <b>Garfield Elementary (0303)</b></i>
<b>Opening Year:</b>	2011
<b>Current Term:</b>	2017-2022
<b>Model:</b>	School-Wide Enrichment
<b>Grades Served:</b>	K-8
<b>Enrollment Capacity:</b>	207
<b>Enrollment (Projected):</b>	177
<b>Mid Term ADA (Actual):</b>	126
<b>FY20 Full-Term ADA:</b>	133

### SCHOOL LEADERSHIP

Chair	Carroll Cone
Treasurer	Mike Haddox
Secretary	Chris Mhyre
Director	Kris Gilgren
Director	Stephanie Callen
Executive Director	Dr. Christine Ivie
Business Manager	Ms. Toni Carver

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PREPARED BY  
Idaho Public Charter School Commission

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## Introduction

Charter schools in Idaho operate on 5-year terms as defined in a [Performance Certificate](#) executed between the school's board and its authorizer. In addition, Idaho law requires that every certificate include a framework describing the expectations the school must meet in order to earn a next operational term. It also requires that charter school authorizers complete performance reports for the schools they oversees each year. The annual performance report serves the following purposes:

1. To provide transparent, data-driven information about charter school quality to the public;
2. To ensure charter school boards have access to clear expectations and are provided maximum opportunity to correct any deficiencies prior to the school's renewal year; and
3. To inform mid-term authorizing decisions (such as consideration of amendments).

This report, based on the performance framework adopted by the PCSC on October 8, 2020, reflects how the school's outcomes during the most recently completed school year measure up against the expectations established in the framework. At the end of each 5-year term, the authorizer reviews the school's annual reports and financial data to inform its decision to renew, conditionally renew, or non-renew, the school for a subsequent term of operation.

Each measure included in the PCSC's framework has a meets standard benchmark. A school that meets standard on all measures at the end of its current operational term is guaranteed an unconditional renewal. A school that does not meet standard on at least one measure at the end of its current operational term may be conditionally renewed or non-renewed. Because the outcomes on this report inform high-stakes decisions, schools are encouraged to use this information to support their strategic planning efforts each year.

COVID-19 NOTE: Please note that due to the COVID-19 pandemic, statewide assessments were canceled in the spring of 2020. No academic evaluation has been made in this report due to absent and incomplete data. The academic outcomes overview page only includes graduation rate (if applicable), though the measure is not rated.

The [performance framework](#) rubrics provide detail on calculations and data sources.

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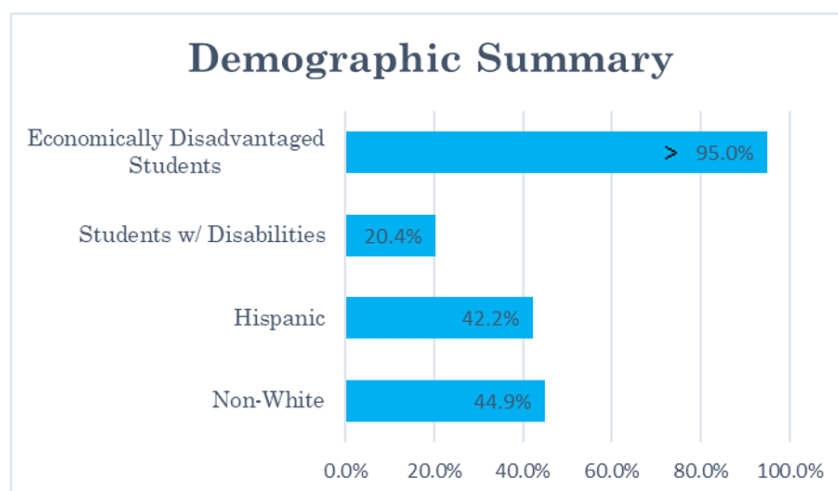
*Each authorized chartering entity shall annually publish and make available to the public a performance report for each public charter school it oversees, in accordance with the performance framework set forth in the performance certificate and section 33-5209(C)(2), Idaho Code.*

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## School Overview

### Key Design Elements

- 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.



# Annual Snapshot



*Schools are encouraged to use this information for strategic planning and to ensure that any identified weaknesses are addressed in advance of renewal consideration.*

<b>ACADEMIC</b>	
Math Proficiency	<i>Not Applicable (2020)</i>
ELA Proficiency	<i>Not Applicable (2020)</i>
Literacy Proficiency	<i>Not Applicable (2020)</i>
Math Growth	<i>Not Applicable (2020)</i>
ELA Growth	<i>Not Applicable (2020)</i>

<b>FINANCIAL HEALTH (NEAR TERM MEASURES)</b>	
Current Ratio	<i>Exceeds Standard</i>
Unrestricted Days Cash	<i>Meets Standard</i>
Default	<i>Exceeds Standard</i>
Enrollment Variance	<i>Approaches Standard</i>

<b>BOARD STEWARDSHIP</b>	
Governance Structure	<i>Exceeds Standard</i>
Governance Oversight	<i>Exceeds Standard</i>
Governance Compliance	<i>Exceeds Standard</i>

<b>FINANCIAL HEALTH (SUSTAINABILITY MEASURES)</b>	
Total Margin	<i>Approaches Standard</i>
Debt to Asset Ratio	<i>Exceeds Standard</i>
Cash Flow	<i>Meets Standard</i>
Debt Service Coverage Ratio	<i>Exceeds Standard</i>
Financial Compliance	<i>Exceeds Standard</i>

<b>MANAGEMENT</b>	
Student Services	<i>Exceeds Standard</i>
Data Security/Transparency	<i>Exceeds Standard</i>
Facility & Services	<i>Exceeds Standard</i>
Operational Compliance	<i>Exceeds Standard</i>

## Academic Outcomes

### Proficiency

(Data Source: Scatterplot)

<b>Math Proficiency</b>	<b>Standard Rating</b>
Math proficiency data is not available for FY20.	N/A
<b>ELA Proficiency</b>	<b>Standard Rating</b>
ELA proficiency data is not available for FY20.	N/A
<b>IRI Spring Proficiency</b>	<b>Standard Rating</b>
IRI spring proficiency data is not available for FY20	N/A
<b>Comments/ Context:</b> <i>Academic ratings are not applicable for 2020 outcomes.</i>	

### Growth

(Data Source: Scatterplot)

<b>Math Growth</b>	<b>Standard Rating</b>
Math growth data is not available for FY20.	N/A
<b>ELA Growth</b>	<b>Standard Rating</b>
ELA growth data is not available for FY20.	N/A
<b>Comments/ Context:</b> <i>Academic ratings are not applicable for 2020 outcomes.</i>	

## Operational Outcomes: Board Stewardship

<b>STANDARD RATING: EXCEEDS STANDARD</b>	
<b>Governance Structure</b>	<b>Data/Evidence Source</b>
The board bylaws are compliant with ID law.	Bylaws 11/15/13. *Please provide an updated copy if any amendments have been made.
The school's articles of incorporation are current.	Articles of Incorporation initially filed 2009. Most recently updated 7/3/20.
The board does operate in compliance with its bylaws.	*No instances of non-compliance documented.
Investigations were not conducted into either ethical behavior or conflict of interest regarding any board director this year.	*No instances of non-compliance documented.
The board did not experience Open Meeting Law violations that needed to be cured this year.	*No instances of non-compliance documented.
<b>Comments/ Context:</b> The school has met this standard for at least 3 consecutive years.	

<b>STANDARD RATING: EXCEEDS STANDARD</b>	
<b>Governance Oversight</b>	<b>Data/Evidence Source</b>
The board did review academic data in a timely and thorough manner.	*No instances of non-compliance documented.
The board did review financial reports in a timely and thorough manner.	*No instances of non-compliance documented.
The board did maintain compliant policies.	*No instances of non-compliance documented.
The board did engage in strategic planning.	*No instances of non-compliance documented.
The board did conduct a compliant evaluation of their school leader or management organization.	*No instances of non-compliance documented.
<b>Comments/ Context:</b> The school has met this standard for at least 3 consecutive years.	

<b>STANDARD RATING: EXCEEDS STANDARD</b>	
<b>General Compliance</b>	<b>Data/Evidence Source</b>
The PCSC did not issue courtesy letters to the school noting compliance concerns this year.	*No instances of non-compliance documented.
Another investigative body was not notified of concerns at this school this year.	*No instances of non-compliance documented.
<b>Comments/ Context:</b> The school has met this standard for at least 3 consecutive years.	



## Operational Outcomes: Management

STANDARD RATING: EXCEEDS STANDARD	
Student Services	Data/Evidence Source
The school's English Language Learners program is in good standing.	*No instances of non-compliance documented.
The school's Special Education program is in good standing.	*No instances of non-compliance documented.
The school's college and career readiness program is in good standing.	Continuous Improvement Plan 2019-2020.
<b>Comments/ Context:</b> The school has met this standard for at least 3 consecutive years.	

STANDARD RATING: EXCEEDS STANDARD	
Data Security and Information Transparency	Data/Evidence Source
The school's website is compliant and updated appropriately.	*No instances of non-compliance documented.
The school did not experience issues involving data security this year.	*No instances of non-compliance documented.
The school did not experience compliance issues with public records requests.	*No instances of non-compliance documented.
<b>Comments/ Context:</b> The school has met this standard for at least 3 consecutive years.	

STANDARD RATING: EXCEEDS STANDARD	
Facility and Services	Data/Evidence Source
The school's occupancy certificate is current.	*No instances of non-compliance documented. <i>Please provide an updated copy for the 2020-2021 school year to PCSC staff.</i>
Safety inspections and evacuation drills are compliant.	*No instances of non-compliance documented. <i>Please provide an updated copy for the 2020-2021 school year to PCSC staff.</i>
The school does provide daily transportation for students.	*No instances of non-compliance documented.
The school does provide a compliant National School Lunch Program.	*No instances of non-compliance documented.
<b>Comments/ Context:</b> The school has met this standard for at least 3 consecutive years.	

STANDARD RATING: EXCEEDS STANDARD	
Operational Compliance	Data/Evidence Source
Required reports were submitted accurately and on time.	*No instances of non-compliance documented.
The enrollment process is compliant.	*No instances of non-compliance documented.
The teachers are properly credentialed.	*No instances of non-compliance documented.
Corrective action plans were not issued by the SDE this year.	*No instances of non-compliance documented.
<b>Comments/ Context:</b> The school has met this standard for at least 3 consecutive years.	

## Financial Outcomes

(Primary Data Source: FY20 Financial Audit.)





Near Term Measures		STANDARD RATING
The school has a current ratio of more than 1.5.	Current Ratio 2.78	<b>Exceeds Standard</b>
The school has between 30 and 60 days cash and one-year trend is positive.	44 Days	<b>Meets Standard</b>
The school is not in default of any financial obligations, and did not experience any instances of default during the fiscal year. The school has met this standard for at least 3 consecutive years.	No Default	<b>Exceeds Standard</b>
The enrollment variance was less than 90% and the school provided an amended budget evidencing break-even based on mid-term enrollment.	Enrollment Variance 71.02%	<b>Approaches Standard</b>
<b>Comments/Context</b>		

Sustainability Measures		STANDARD RATING
Aggregated 3-Year Total Margin is greater than -1.5 percent, but the most recent year total margin is negative.	Most Recent Year Total Margin -6.6% 3-Year Aggregated 1.53%	<b>Approaches Standard</b>
Multi-Year Cumulative Cash Flow is positive and Cash Flow is positive in the most recent year.	Most Recent Year \$2,987 Previous Year \$147,867 Multi-Year \$150,854	<b>Meets Standard</b>
The school's debt service coverage ratio is 1.5.	Debt Service Coverage Ratio 2.31	<b>Exceeds Standard</b>
The school's Debt to Asset Ratio is less than 0.9. The school has met this standard for at least 3 consecutive years.	Debt/Asset Ratio -.55	<b>Exceeds Standard</b>
<b>Comment/Context</b>		

<b>STANDARD RATING: MEETS STANDARD</b>	
Financial Operations	Data and/or Evidence Source
The school's finances are managed in compliance with GAAP.	Financial Audit received on 10/26/20 *No instances of non-compliance documented.
Expenditures and contracts are posted online appropriately.	School's Expenditure Page was reviewed quarterly. *No instances of non-compliance documented.
The school maintains compliant internal controls.	*No instances of non-compliance documented
The school is not operating under a Notification of Fiscal Concern.	N/A
The school is not operating under a Notification of Possible or Imminent Closure.	N/A
<b>Comments/Context</b>	

## Longitudinal Snapshot





### Operational Outcomes: Board Stewardship

 2020 
  2021 
  2022 
  2023

Governance Structure	EXCEEDS STANDARD	DATA NOT AVAILABLE	DATA NOT AVAILABLE	DATA NOT AVAILABLE
Governance Oversight	EXCEEDS STANDARD	DATA NOT AVAILABLE	DATA NOT AVAILABLE	DATA NOT AVAILABLE
Governance Compliance	EXCEEDS STANDARD	DATA NOT AVAILABLE	DATA NOT AVAILABLE	DATA NOT AVAILABLE

“Success is the sum of small efforts repeated day in and day out.”  
 -Anonymous

### Operational Outcomes: Management

 2020 
  2021 
  2022 
  2023

Student Services	EXCEEDS STANDARD	DATA NOT AVAILABLE	DATA NOT AVAILABLE	DATA NOT AVAILABLE
Data Security & Transparency	EXCEEDS STANDARD	DATA NOT AVAILABLE	DATA NOT AVAILABLE	DATA NOT AVAILABLE
Facility & Services	EXCEEDS STANDARD	DATA NOT AVAILABLE	DATA NOT AVAILABLE	DATA NOT AVAILABLE
Operational Compliance	EXCEEDS STANDARD	DATA NOT AVAILABLE	DATA NOT AVAILABLE	DATA NOT AVAILABLE

“Education is the MOST powerful weapon which you can use to change the world.”  
 -Nelson Mandela