

IPCSC Regular Meeting

Idaho Public Charter School Commission

Jun 9, 2022 9:00 AM MDT

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I. COMMISSION WORK

A. AGENDA APPROVAL

The IPCSC must approve the agenda prior to beginning the meeting.

COMMISSION ACTION

A motion to approve the agenda as presented; or

A motion to amend the agenda [state amendment] based on the following good faith reason [state reason amendment is necessary].

B. MEETING MINUTES

The IPCSC will consider approval of meeting minutes for the previous meeting.

COMMISSION ACTION

A motion to approve the meeting minutes for April 14, 2022 as presented; or

A motion to approve the meeting minutes for April 14, 2022 with the following amendments: [state specific amendments].

IDAHO PUBLIC CHARTER SCHOOL COMMISSION REGULAR MEETING AGENDA

Date: Thursday, June 9, 2022
Start Time: 9:00 A.M., MST

Physical Location: Joe R. Williams Building, West Conference Room
700 W. Jefferson Street, Boise, ID

Remote/Public Access via YouTube Livestream:
<https://www.youtube.com/channel/UChV-TDWV4fvl-UoozmMeoPA>

I. COMMISSION WORK (Action Item)

- A. Agenda Review / Approval
- B. Minutes Review / Approval

II. PUBLIC COMMENT

Public comment will be limited to three minutes per person. Please see IPCSC policy for more information.

III. PRE-OPENING UPDATE

- A. Elevate Nampa
- B. Elevate North
- C. Gem Prep Meridian South
- D. Mountain Community School

IV. DIRECTOR'S REPORT

V. CONSIDERATION OF AMENDMENTS (Action Item)

- A. Project Impact STEM Academy
- B. Cardinal Academy

VI. NOTIFICATION OF FISCAL CONCERN (Action Item)

- A. Bingham Academy
- B. Peace Valley Charter School
- C. The Village Leadership Academy

VII. ANNUAL REPORT REVIEW

- A. Falcon Ridge Public Charter School
- B. Future Public School
- C. Gem Prep Meridian
- D. Heritage Community Charter School
- E. Idaho Science and Technology Charter School

VIII. FINANCE COMMITTEE UPDATE

**MEETING MINUTES
IDAHO PUBLIC CHARTER SCHOOL COMMISSION**

April 14, 2022

Joe R. Williams Building, 700 W State St, West Conference Room
Boise, ID 83702

This meeting was called to order by Chairman Reed on April 14, 2002 at 9:13 a.m.

Alan Reed – Present
Sherrilynn Bair – Present
Brian Scigliano – Present
Wanda Quinn – Present
Nils Peterson – Present
Julie VanOrden – Present
Dean Fisher - Present

I. COMMISSION WORK

A. Agenda Review/Approval

M/S (Scigliano/Van Orden) Motion to approve the agenda as presented. *The motion passed unanimously.*

B. Minutes Review/Approval

M/S (Quinn/Bair) Motion to approve the February 10 and 11, 2022 minutes as presented. *The motion passed unanimously.*

II. PUBLIC COMMENT

No public comment was offered.

III. CONSIDERATION OF PERFORMANCE CERTIFICATES

IPCSC reviewed performance certificates for schools renewed for a 2022-2027 term.

M/S (Scigliano/Van Orden) Motion to approve the performance certificates to begin July 1, 2022 and end June 30, 2027 as presented for the following schools: American Heritage Charter School, Bingham Academy, Chief Tahgee Elementary Academy, Coeur d'Alene Charter Academy, Heritage Academy, Idaho Connects Online, iSucceed Virtual High School, Idaho Technical Career Academy, Kootenai Bridge Academy, and Syringa Mountain School. *The motion passed unanimously.*

M/S (Peterson/Quinn) Motion to approve the performance certificate for Richard McKenna Charter School to begin July 1, 2022 and end June 30, 2027, including the following: (1) Clarification of renewal conditions 2, 3, and 5

indicating that these conditions apply specifically to the school's K-12 onsite program; (2) Inclusion of definitions with regard to alternative measures 4 and 5; (3) Customization of alternative measure 6 to reflect the school's six-week block schedule; and (4) Addition of a secondary path to meeting standard on the graduation rate measure for the onsite program that considers the school's small cohort size. *The motion passed unanimously.*

IV. DIRECTOR'S REPORT

Director Thompson shared updates on Mountain Community School, state of Idaho's upcoming transition to new financial and HR software, financial oversight, school monitoring, FY23 renewal orientations, site visits and observations, charter enrollment, and rulemaking.

No action.

V. STRATEGIC PLAN

IPCSC was presented with a report on the FY22 strategic plan and a proposed FY23 strategic plan, options for agency relocation, and discussed potential 2023 legislative ideas.

A. FY22 Strategic Plan

M/S (Fisher/Quinn) Motion to accept the Director's report of FY22 progress on strategic planning goals and to approve the proposed adjustments to the agency's strategic plan as presented. *The motion passed unanimously.*

B. Facility Options

M/S (Peterson/Scigliano) Motion to pursue a permanent move to the Chinden Campus for FY24 and a temporary relocation in the Capitol Mall area in May of 2022. *The motion passed unanimously.*

C. Legislative Ideas

No action.

VI. FRAMEWORK REVISIONS

The IPCSC was presented with proposed revisions to the K-12 General Education framework, as well as proposed revisions to the Supplemental Alternative School measures.

M/S (Quinn/Bair) Motion to approve the proposed revisions as presented. *The motion passed unanimously.*

VII. FINANCIAL MANAGEMENT

A. FY23 Budget Adjustments

The IPCSC was presented with proposed adjustments to the FY23 budget.

M/S (Bair/Quinn) Motion to approve the additional expense of \$12,000 to the FY23 budget for the purpose of acquiring temporary part-time financial support for fiscal year 2023 only. *The motion passed unanimously.*

B. FY24 Budget Approval

The IPCSC was presented with a proposed budget for FY24.

M/S (Bair/Scigliano) Motion to approve the FY24 budget as presented including the following line items: (1) An ongoing increase to the agency's general fund appropriation of \$100,000 to facilitate two additional FTE, bringing the agency's total FTE to 7 and the agency's general fund appropriation request for FY24 to \$282,400; (2) A one-time appropriation of \$25,000 from the general fund to facilitate agency moving costs and the associated capital outlay for furniture, fixtures, and equipment; (3) An increase to the agency's dedicated fund of 20% over the FY23 dedicated fund appropriation, bringing the agency's total FY24 dedicated fund appropriation request to \$595,080. *The motion passed unanimously.*

VIII. COMMISSION EDUCATION

Commissioners discussed two articles regarding effective relationships between charter schools and regarding Education Service Providers.

No action.

IX. CONSIDERATION OF COMMISSION DIRECTOR'S EVALUATION

M/S (Bair/Peterson) Motion to enter executive session, pursuant to Idaho Code 74-206(1)(b) to consider the annual evaluation of the agency director. *The motion passed unanimously via roll call vote.*

IPCSC entered executive session at 12:00pm.

IPCSC resumed regular session at 12:24pm.

M/S (Bair/Van Orden) Motion to approve the evaluation of Director Thompson for FY22. *The motion passed unanimously.*

A motion to adjourn was made by Commissioner Scigliano, second by Commissioner Fisher.
The motion passed unanimously. The meeting adjourned at 12:28pm.

DRAFT

II. PUBLIC COMMENT

A. Live Comment

1. Members of the public may address the IPCSC during this meeting.
2. Members of the public are asked to indicate the topic they wish to address on the sign-in sheet prior to the start of the meeting.
3. Public comments shall be limited to three (3) minutes.

B. Written Comment

1. Written comment may be submitted to the IPCSC staff at any time.
2. Written comment must be identified as such and must include the name and contact information of the author.
3. Written comment submitted at least seven (7) days in advance of a IPCSC meeting will be included in the meeting materials.
4. Written comment submitted fewer than seven (7) days in advance of a IPCSC meeting will be distributed to commissioners, but may not be included in the meeting materials.
5. Written comment will be read aloud at the regularly scheduled IPCSC meeting following receipt and will be limited to three (3) minutes.

III. PRE-OPENING UPDATE

APPLICABLE STATUTE, RULE, OR POLICY

I.C. §33-5206(6)

BACKGROUND

Idaho Code allows authorizers to establish reasonable pre-opening requirements “to monitor start-up progress of newly approved public charter schools and ensure that they are prepared to open smoothly on the date agreed, and to ensure that each school meets all building, health, safety, insurance, and other legal requirements for school opening.

DISCUSSION

The IPCSC authorizes four (4) charter schools approved to open in the fall of 2022. These include: Gem Prep Meridian South, Elevate North, Elevate Nampa, and Mountain Community School (formerly McCall Community School).

All pre-opening conditions have been met.

IPCSC staff conducts a series of meetings with each pre-opening school to track the school’s progress toward opening day.

SPEAKER

IPCSC Program Manager, Jared Dawson

IMPACT

Information item only.

STAFF COMMENTS AND RECOMMENDATIONS

Staff has no comments or recommendations.

COMMISSION ACTION

No Action



514 W. Jefferson, Ste. 303
Boise, ID 83720
pcsc@osbe.Idaho.gov

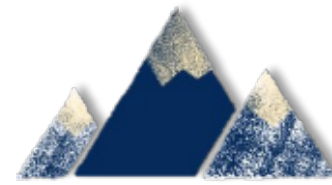
Pre-Opening Update

Idaho Public Charter School
Commission

The background is a collage of four images. Top left: A modern conference room with a large glass table and black chairs. Top right: A stack of books, including several red-spined volumes and an open book. Bottom left: A hand holding a heart-shaped icon containing three red gears, with other icons like a puzzle piece and a checkmark nearby. Bottom right: A laptop displaying various charts and graphs, with a person's hands typing on the keyboard.

IPCSC

Key Progress Indicators



- **Leadership**
 - Are strong leaders in place?
- **Finance**
 - Is the school prepared to receive and manage funds?
- **Facilities**
 - Will the location meet the needs of the students and staff?
- **Enrollment**
 - Are there enough students to meet budget expectations?
- **Operations**
 - Is the development of systems/structures on track?
- **Conditions**
 - Is the school meeting conditions established by the IPCSC?

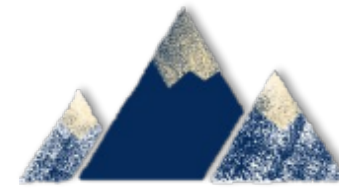
Elevate Academy Nampa

Alternative, Career Technical
Education



IPCSC

Elevate Academy Nampa



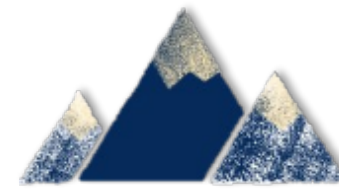
School Leadership

Jewels Carpenter – Administrator | Phil Diplock – Administrator | Erick Bullock – Board Chair
Monica White – Chief Visionary Officer | Matt Strong – Director of Growth & Development

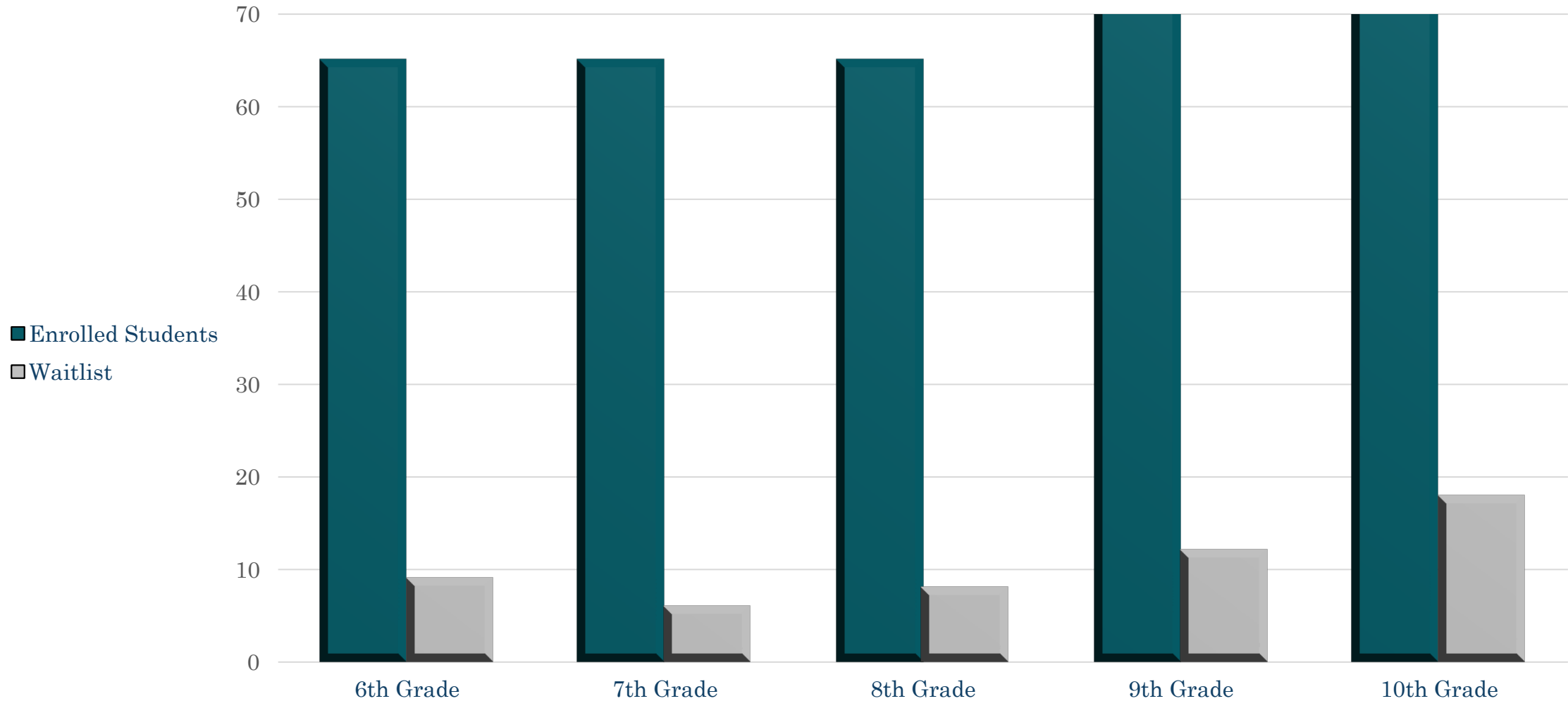


- Facilities
 - 11425 Orchard Ave, Nampa, ID 83651
 - Executed Lease
 - 40Yr. Lease
 - Fixed rent to repay total project cost of \$13,619,613
- Finance
 - BLUUM CSP Subgrant
- Conditions
 - None

Enrollment



ELEVATE ACADEMY NAMPA



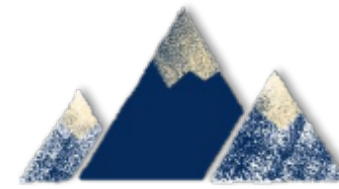
Elevate Academy North

Alternative, Career Technical
Education



IPCSC

Elevate Academy North



School Leadership

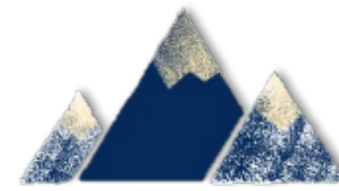
Marita Diffenbaugh–Administrator | Erick Bullock – Board Chair

Monica White – Chief Visionary Officer | Matt Strong – Director of Growth & Development

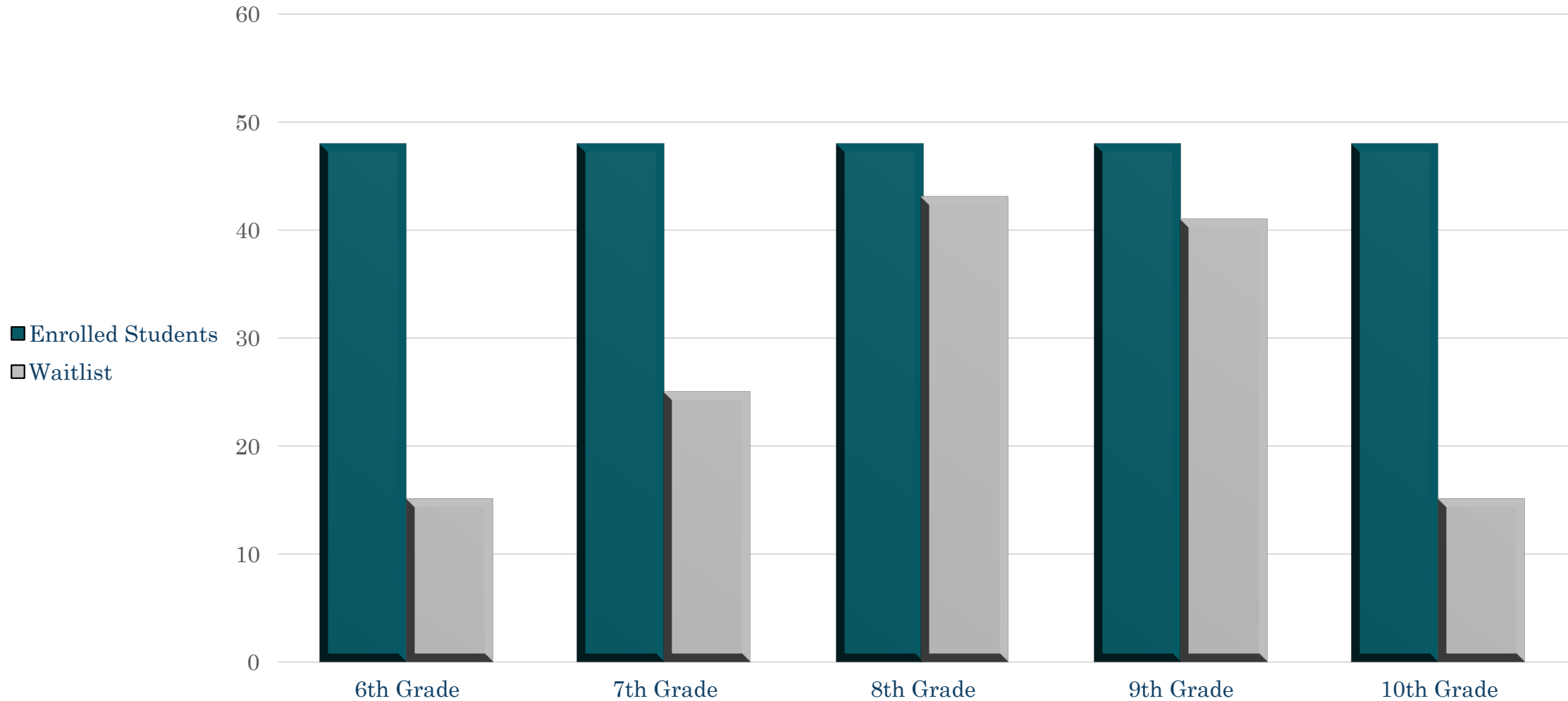


- Facilities
 - 3716 E. Killdeer Ave, ID
 - Executed Lease
 - 40Yr. Lease
 - Fixed rent to repay total project cost of \$11,976,846
- Finance
 - BLUUM CSP Subgrant
- Conditions
 - None

Enrollment



ELEVATE ACADEMY NORTH



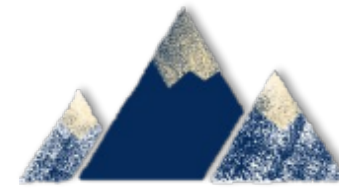
Gem Prep Meridian South

Postsecondary Prep



IPCSC

Gem Prep: Meridian South



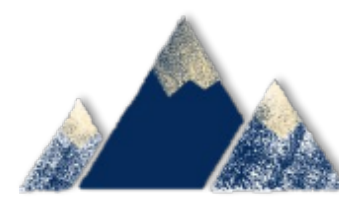
School Leadership

Kyle Leybas –Administrator | Dennis Turner – Board Chair
Jason Bransford– Chief Executive Officer

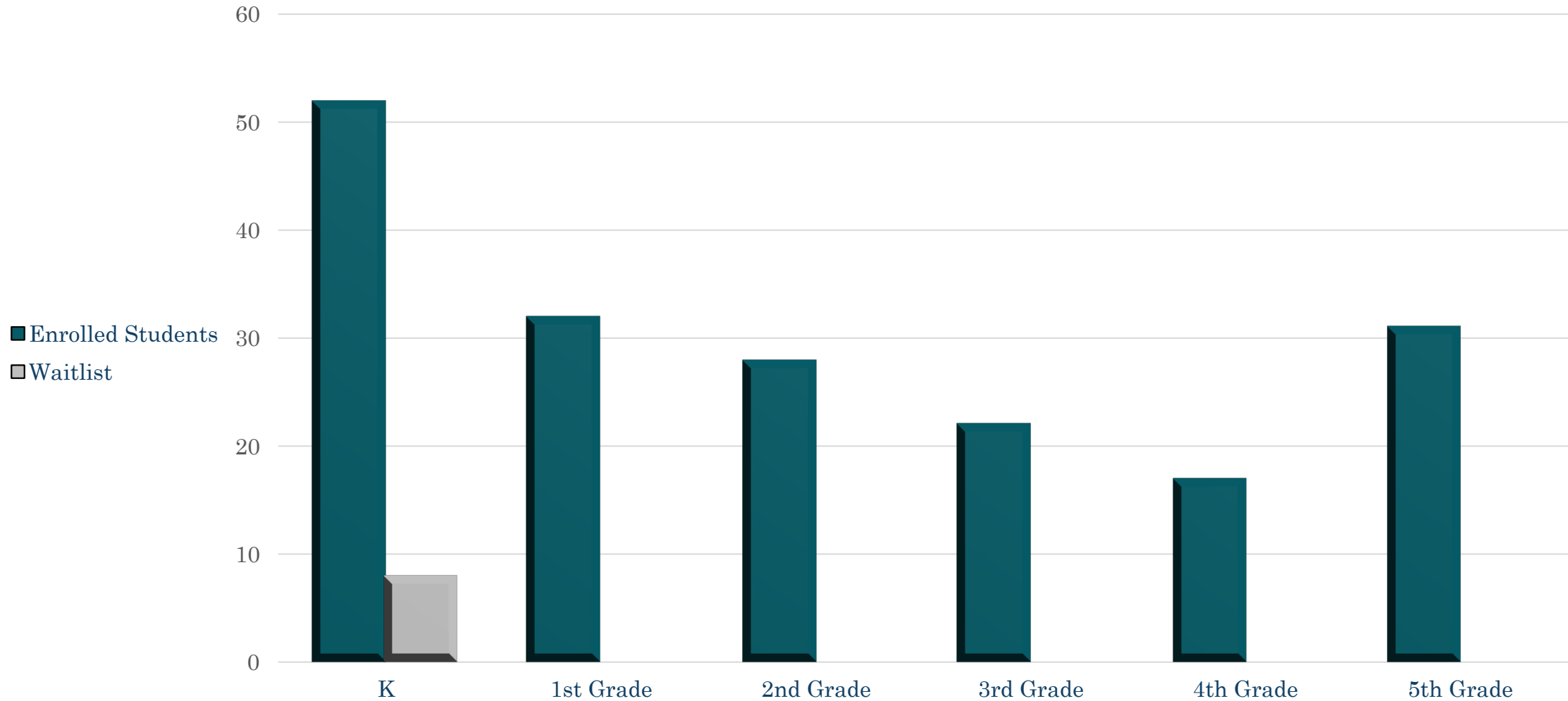


- Facilities
 - 1925 E. Lake Hazel Rd., Meridian, ID 83642
 - Mortgage –
 - First Loan \$10,185,000
 - Second Loan - \$2,000,000
- Finance
 - BLUUM CSP Subgrant
- Conditions
 - None

Enrollment



GEM PREP | MERIDIAN SOUTH



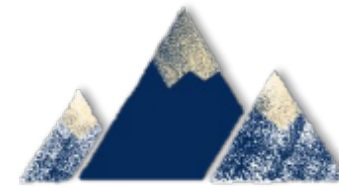
Mountain Community School

Place-Based



IPCSC

Mountain Community School



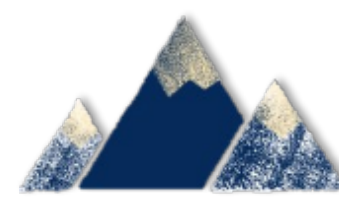
School Leadership

Patrick Berg - Administrator | Jenny Schon - Administrator
Jonas Bean - Board Chair

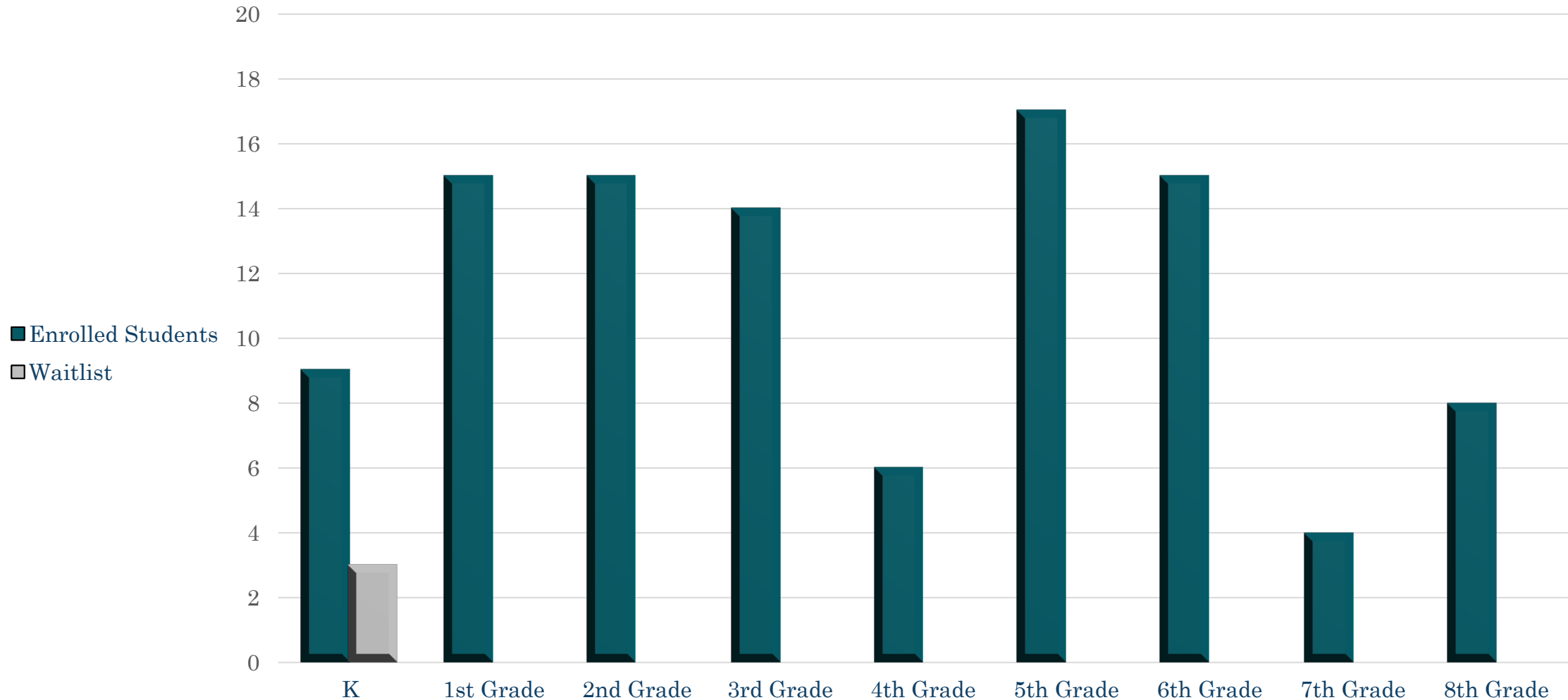


- Facilities
 - PO Box 490, McCall, ID 83638
 - Tamarack Resort providing facilities, LOI to provide agreement before August 1, 2022
- Finance
 - Charter Schools Development Coordinator Loan
- Conditions
 - Met – Submission of balanced budget by April 1, 2022

Enrollment



MOUNTAIN COMMUNITY SCHOOL



IV. DIRECTOR'S REPORT

APPLICABLE STATUTE, RULE, OR POLICY

NA

BACKGROUND

The IPCSC Director oversees the day-to-day management of the authorizing office. This agenda item provides opportunity for a brief report regarding actions taken and work in progress at the staff level.

DISCUSSION

1. We have a new address. Capitol Annex Building, 514 W. Jefferson, Ste. 303.
2. Welcome our new Finance Manager, Jacob Smith.
3. Non-renewal appeal hearing was held on 5/24. SBE to make final decision.
4. We are stepping-up direct contact with our schools – since January, the IPCSC staff has conducted 12 board meeting observations, 4 school site visits, 24 lottery observations, 17 renewal orientations, and approximately 15 other instances of direct contact. The effort has been well received.
5. Charter Sector Events:
 - a. IASBO Conference Session (6/23) – “Join the IPCSC and the DFM for a round table discussion focused on charter-specific obstacles you are challenged with in the day-to-day operations of your school. The goal of this conversation is to identify issues that are not already in the spotlight and to short-list priorities.”
 - b. IPCSC Zoom Lunch and Learn (6/3/22)– discussion with administrators regarding board training needs.

SPEAKER

IPCSC Director, Jenn Thompson

IMPACT

Information item only.

STAFF COMMENTS AND RECOMMENDATIONS

No comments or recommendations.

COMMISSION ACTION

No action.

V. CONSIDERATION OF AMENDMENTS

A. Project Impact STEM Academy

APPLICABLE STATUTE, RULE, OR POLICY

I.C. §33-5206(8) – Performance Certificate Amendments

I.C. §33-5205B – Performance Certificates

BACKGROUND

All charter schools operate under the terms and conditions of a performance certificate. Performance certificates can be amended by mutual agreement of the school and the authorizer at any time.

DISCUSSION

Project Impact STEM Academy (PI STEM) opened in the fall of 2019. The school offers a project-based learning model with a STEM focus to approximately 230 students in grades K-12.

PI STEM has requested an amendment to its performance certificate to expand its primary attendance area. This change would incorporate a small section of a West Ada School District. West Ada School District is not currently impacted by the school.

West Ada School District has been informed of the change, and has not expressed concern. As the school's enrollment is stable, it is unlikely that such a change will have a negative impact on the district.

SPEAKER

Board Chair, Theresa Fleming

Director, Jill Hettinger, Ph.D.

IMPACT

If the IPCSC approves the amendment request the school's performance certificate will be updated. If the IPCSC does not approve the amendment request the school will continue to operate under the existing performance certificate.

STAFF COMMENTS AND RECOMMENDATIONS

Staff recommends that the IPCSC approve the amendment to Project Impact STEM Academy's performance certificate as presented.

COMMISSION ACTION

A motion to approve the performance certificate amendment for Project Impact STEM Academy as presented;
OR

A motion to deny the performance certificate amendment for Project Impact STEM Academy as presented.



Project Impact STEM Academy

Invested in the life-long pursuit of knowledge.

May 3, 2022

Chairman Reed & PCSC Commissioners:

Project Impact STEM Academy (Pi STEM) would like to request an amendment to the school's performance certificate in reference to its current primary attendance area and facility location.

In the school's current certificate, the primary attendance area is defined to correspond with the boundaries set forth by the Kuna School District and the facility location of 2275 W. Hubbard Road, Kuna, ID 83634. As Pi STEM continues to grow, we are rapidly feeling the pressure our current facility is placing on our students, staff, and budget. As such, the board and school leadership would like to plan for the future of the school. To strategically plan and provide additional opportunities for the school, the board believes it is important to expand the current primary attendance area and allow for the possibility for an alternate facility location.

Pi STEM has shown dramatic growth in our operational, academic, and fiscal areas. This growth is evident in our patron support, leadership, staff and student retentions, and the leaps made in relation to fiscal standing. In a relatively short timeframe, we have moved from the consideration of a letter of financial concern from your office to a pre-qualification for the Idaho moral obligation loan funding.

The requested primary attendance area expansion encompasses a small area just north of the current attendance boundaries. This minor adjustment would allow Pi STEM leadership the capability to consider improved facilities options for the school's continued success.

Thank you for your consideration.

Sincerely,

Teresa Fleming

Pi STEM Board Chairman

Primary Attendance Area

The primary attendance area for Pi STEM will lie primarily within the current boundaries of the Kuna School District, with an expansion that encompasses the area from Robinson Rd. (West Side) to Eagle Rd. (East Side), to Franklin Rd. (North), and an eastward extension from Robinson Rd. (East Side) to Cloverdale Rd. (West Side), and E. Amity Rd. (North) to E. Lake Hazel Rd. (South). ~~as seen in the map below.~~ The current Kuna District area with the northern Pi STEM addition can be seen in Figure 5 below.

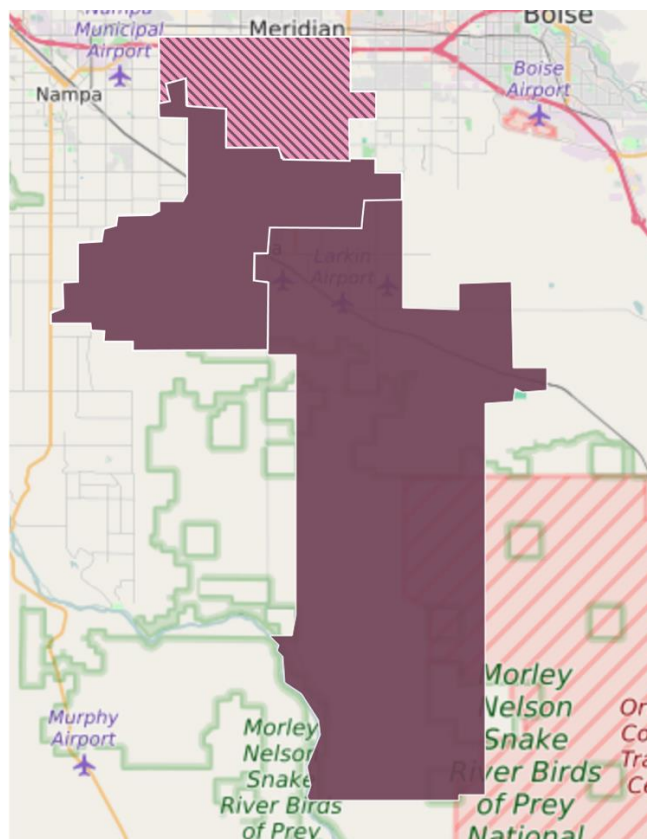
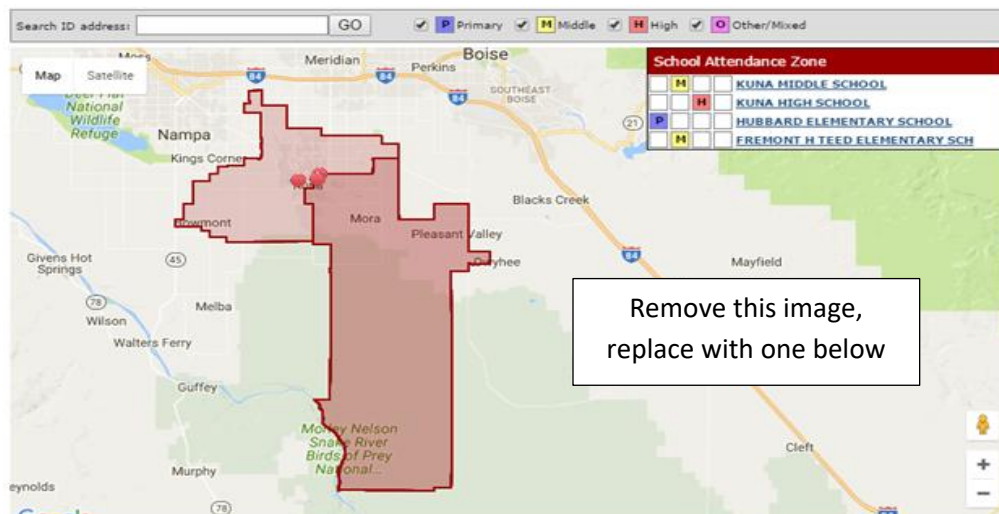


Figure 5: [Pi STEM](#) Attendance Map

Pi STEM is located in the Treasure Valley region of Idaho, [with the primary attendance area located](#) in the city of Kuna. As of the 2010 Census, there were 15,210 people living in the city. The racial makeup of the city was 91.2% White, 0.6% African American, 0.8% Native American, 0.7% Asian, 0.1% Pacific Islander, 3.6% from other races, and 2.9% from two or more races. Hispanic or Latino of any race was 8.6% of the population.

The demographics of the proposed school will be mixed with no focus on ethnicity, gender, or socioeconomic background. All students will be welcome and all students will have the opportunity to excel in their choice of study.

Community Need and Market Interest

The city of Kuna, is a growing bedroom community in the Treasure Valley located in Southwestern Idaho. Kuna's growth rate is outpacing the ability for the local school district to be able to provide a learning environment that is personalized to the individual student's needs. As the city of Kuna and its school district continues to grow, the need for families to be able to choose a form of education that fits their student's needs will also continue to grow.

Wendy Johnson, the current superintendent of the Kuna school district recently stated in a district press release that "The current high school will be approximately 200 students over capacity this year and so our need is profound." (For another school) The current Kuna High



Project Impact STEM Academy

Invested in the life-long pursuit of knowledge.

May 3, 2022

RE: Requested Performance Certificate change to primary attendance area

Project Impact STEM Academy's (Pi STEM) current primary attendance area is defined to align to Kuna School District's boundaries.

The current boundary can be seen in Image 1.

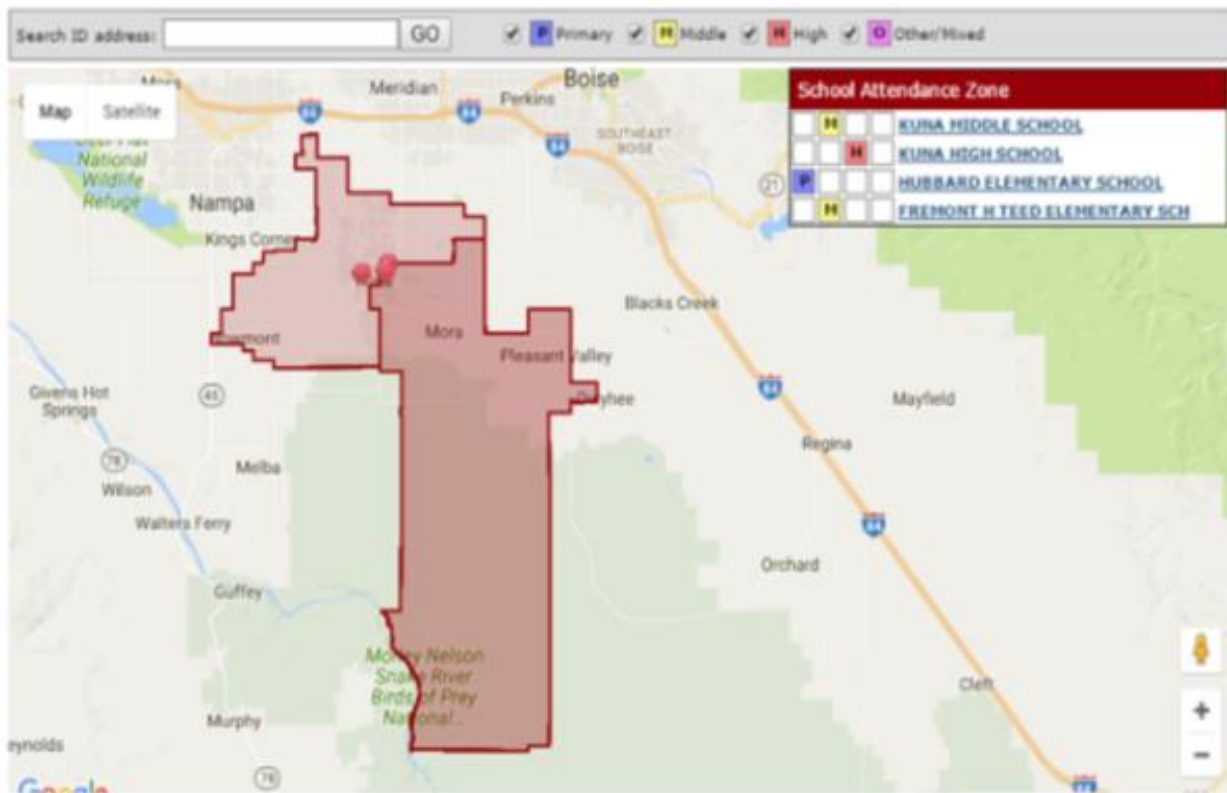


Image 1: Current Pi STEM Primary Attendance Area

To expand the school's options available, Pi STEM is requesting the adjustments, as noted in Image 2, to its primary attendance area. The blue shaded area represents the current West Ada

School District. The red shaded area represents the area currently included in the Kuna School District, and therefore Pi STEM's attendance area. The requested area is noted with the red/blue crosshatch fill.

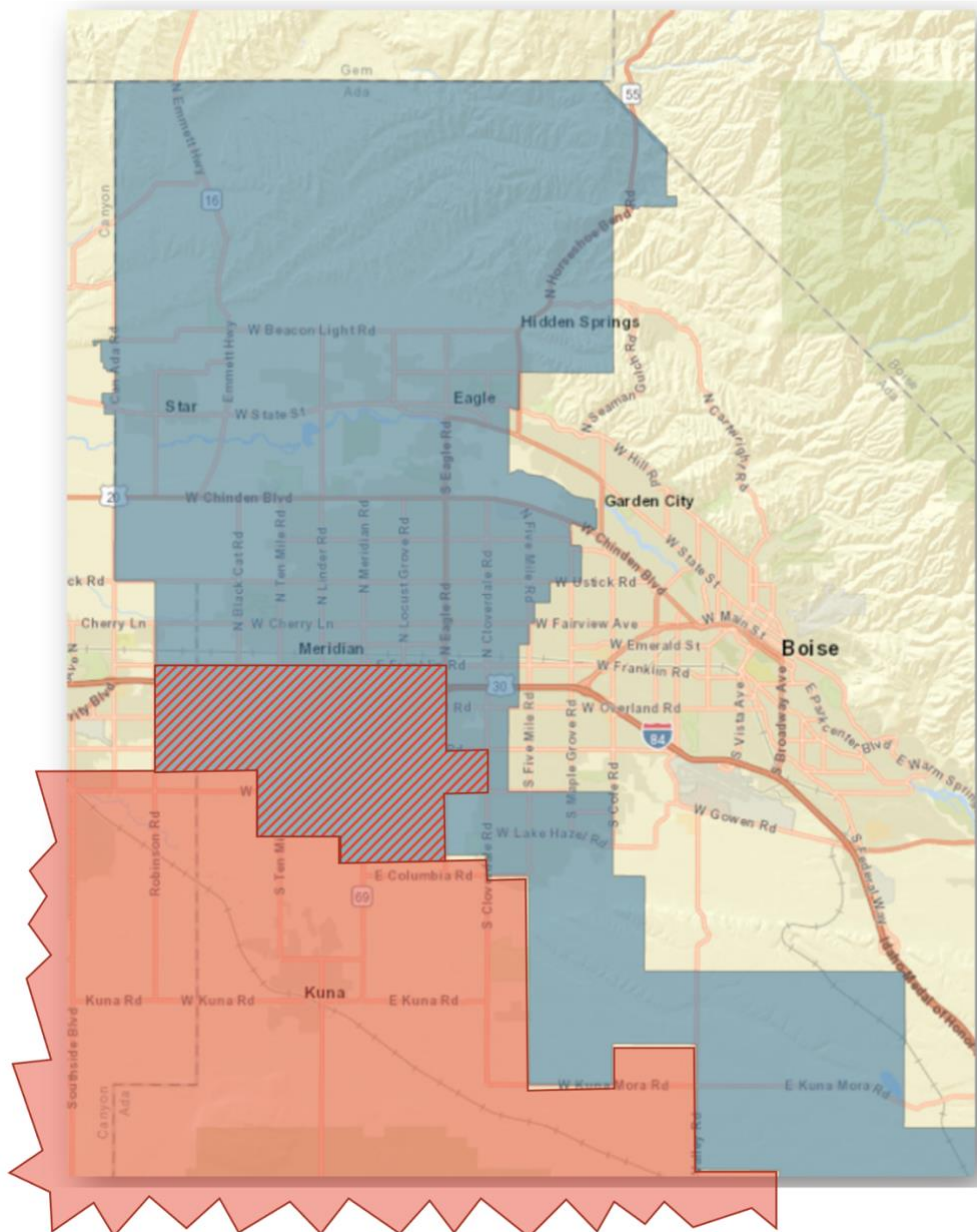


Image 2: Proposed Pi STEM Attendance Area

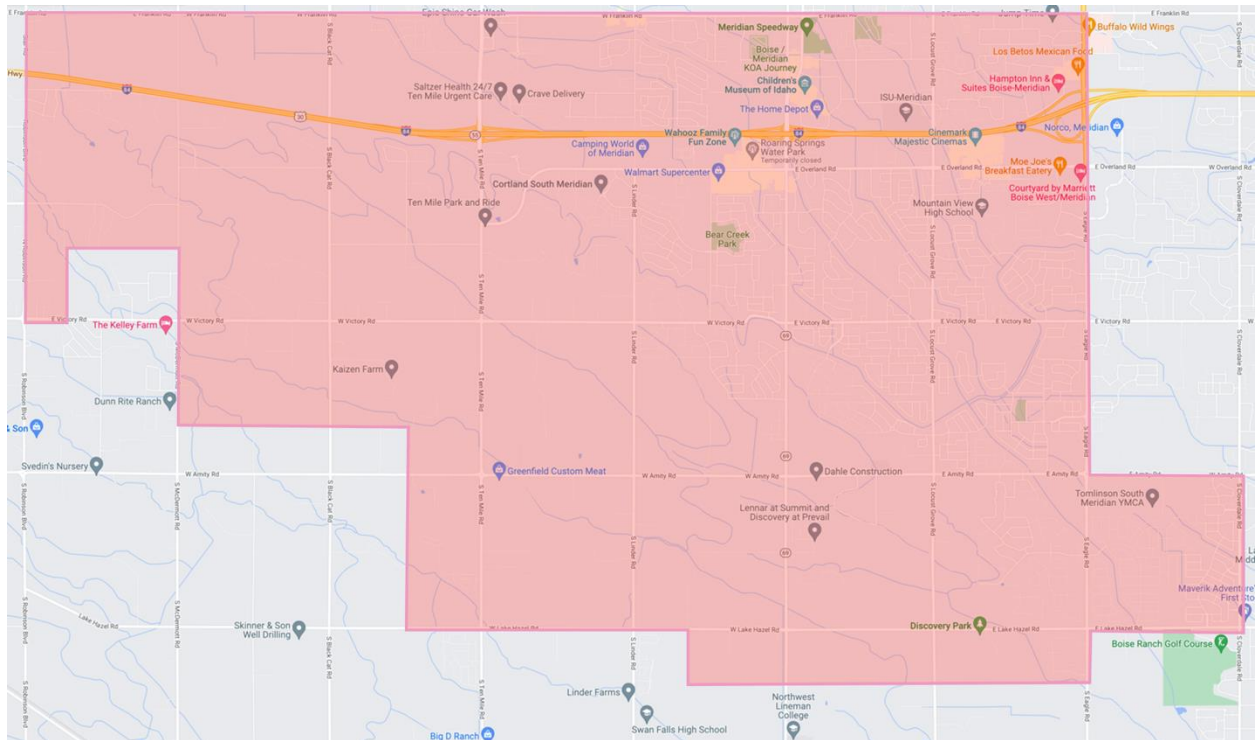
The proposed attendance area expansion encompasses the area from Robinson Rd. (West side) to Eagle Rd. (East side), to Franklin Rd. (North), with an eastward extension to from Robinson Rd. (East Side) to Cloverdale Rd. (West Side), and E. Amity Rd. (North) to E. Lake Hazel Rd. (South).

At the time of this request, Pi STEM has not made any commitment for a change to its facility location. However, the school board and leadership would like to have the opportunities available to at least consider alternate options to best meet the needs of its students, staff, and fiscal responsibilities.

Pi STEM's current facility is comprised of three leased portable structures (~9,000 sq ft) and 2 rented trailers (~3,000 sq ft). The temporary structures are located on 8.96 acres in which only ~ 4 acres are currently in use. Within those 4 acres there are the portable structures, a small parking lot, and a bus loop. Pi STEM's current lease includes an escalating rent cost of 2.5% each year and the school have an option to buy the property until July 2024. After July 2024 the buy-out is no longer an option given to the school. The school has attempted numerous discussions with the property owners related to the purchase of the property but have been unable to reach a negotiable area regarding price. The owners have remained strong on their required purchase price that is nearly 2.5 times that of the appraised value. The Pi STEM board does not believe that purchase price is valid use of its taxpayer appropriated funds.

Due to the concerns related to the purchase of, and continuing escalating costs of the current facility location, the Pi STEM board and leadership have been seeking alternate options for the school's continued success.

As previously stated, the Pi STEM leadership has began investigating alternate options within the proposed adjustment area. Viable options that offer nearly 2-3.5 times the space at nearly the same cost to the school are being seriously considered at this time. The Pi STEM board and leadership believe considerations for the future, our planning for the future, is imperative to building a successful story for our students, our staff and the mission of Pi STEM.



V. CONSIDERATION OF AMENDMENTS

B. Cardinal Academy

APPLICABLE STATUTE, RULE, OR POLICY

1. **I.C. §33-5206(8)** - A public charter school and an authorizer may enter into negotiations to revise a charter or performance certificate at any time.
2. **I.C. §33-5209C** - Authorizers are tasked with continually monitoring the schools it authorizes to ensure that they remain compliant with applicable laws, rules, policies, and regulations and the terms of the performance certificate.
3. **Cardinal Academy Performance Certificate (page 88)** – Cardinal Academy’s (CA) charter was conditionally approved with the following conditions due no later than May 26, 2021:
 - a. Evidence of 50 students by record of accepted offers;
 - b. Evidence of award of 100% of the anticipated grants and philanthropic dollars included in the pre-operational and break-even year 1 budgets as presented in the petition; and
 - c. Evidence of a fully executed facility lease specifying that the annual lease payment will not exceed the state reimbursement for facilities and letter funds received by the school in any given year as described in the petition.
4. **Section 1A of the school’s Performance Certificate** - “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.”
5. **IPCSC Policy Section IV.C** - The scope of changes necessary to align CA’s authorized charter with the terms of the continuation plan and professional services agreement require several sections of the school’s charter to be revised. CA is currently in the first operating year of its first operating term.

HISTORY

Prior to the pre-opening condition due date, CA provided the JKAF Grant Agreement (included in these materials) as evidence of meeting condition (b) and a lease agreement with the Salvation Army as evidence of meeting condition (c). CA did not meet condition (a). Consequently, In June of 2021, the school appeared before the IPCSC a second time for consideration to delay opening. The Commission did not delay the school’s opening.

FOR CONSIDERATION

Cardinal Academy is requesting to amend several sections of its charter narrative, which is incorporated into the performance certificate. Pursuant to IPCSC Policy, Section IV, regarding amendments, Cardinal Academy has submitted the following documentation for consideration:

1. A cover letter explaining the nature of and rationale for the proposed amendments, provided on 5/24;
2. A letter of support from JKAF, provided on 5/25;

3. A budget document prepared by the school, provided on 5/25; and
4. A document comprising the section(s) of the Charter or Performance Certificate to be amended, provided on 5/24:
 - Page 3 (page 45 of Commissioner packet) – references to the original founders have been removed throughout the petition.
 - Pages 14-20 (pages 56-62 of Commissioner packet) –incorporates the Elevate Academy approach to curriculum, daily scheduling, and the use of Elevate’s proprietary learning management system, LiFT, to facilitate blended learning.
 - Page 29 (page 71 of Commissioner packet) –begins the changes to staffing and the subsequent financial impact.
 - Page 35 (page 77 of Commissioner packet) –presents the current board director make up.
 - Page 51 (page 93 of Commissioner packet) – begins the changes to the management and leadership section, presenting CA as EAF managed.
 - Page 57 (page 99 of Commissioner packet) – begins the incorporation of the Elevate Academy LiFT blended learning model.

Pursuant to IPCSC Policy, Section IV, IPCSC staff has also included the following supporting documentation:

- JKAF Grant Agreement – 4/1/21, presented as evidence of pre-opening condition b fulfillment.
- Cardinal Academy Continuation Plan – received by IPCSC on 5/4/22
- EAF Professional Services Agreement – received by IPCSC on 5/11/22
- Other Statutory Considerations – Prepared by IPCSC staff

DISCUSSION

The funds originally granted by JKAF to CA were contingent on the school meeting the terms of the JKAF Grant Agreement. Section 5.1 of this Grant Agreement states that changes to key personnel must be approved by JKAF. In early April of 2022, JKAF informed CA’s administrator that grant funds would no longer be available, presumably due to the fact that the administrator had stated her intent to resign at the end of the school year.

Without JKAF funding, the school cannot operate. In April all staff were informed that contracts with CA would not be renewed and students were informed that the school was closing. This appears to be action taken based on direct instruction from JKAF leadership to the administrator. It was never discussed by the board and the board did not inform its authorizer of imminent closure as required by IDAPA.

At some time after notice of closure was made, JKAF again offered funding over the next two years on condition that the CA board agree to a continuation plan (presumably developed by JKAF, though document authorship is unclear) *and* that the board execute a professional services agreement drafted by the Elevate Academy Foundation (EAF) and approved by JKAF. Under this plan and agreement, CA would be operated by EAF, a charter management organization.

JKAF funding for the remainder of the 2021-22 fiscal year, which in April appeared to be in question, was verbally guaranteed by a BLUUM representative at CA's May 11th meeting. The board chair and the administrator both stated that they understood this offer to pay teachers through the end of the current fiscal year was also contingent on the board voting in favor of the proposed management services agreement.

No documentation or commitment of funding was provided by JKAF to the CA board before the board's May 11th decision. Additionally, the letter of support from JKAF, drafted after the board meeting, was provided to the IPCSC on 5/25 and notes a different dollar amount (lower) than that presented to the CA board to inform their May 11th vote.

IPCSC staff attended the CA board's May 11th Meeting. At that meeting the CA board voted to submit an amendment request to the IPCSC, to adopt the continuation plan as presented, and to execute the professional services agreement with EAF.

Amendment materials were submitted to the IPCSC on 5/24 and further support documentation followed on 5/25.

19 students graduated from CA the last week of May.

CONCERNS

1. The governing board is not making decisions autonomously, but has allowed itself to be in a position in which third party entities have, at least in this situation, forced the board's hand in arriving at a specific outcome.

Additionally, during the May 11th meeting, board directors discussed the fact that the copy of the professional services agreement between EAF and CA that was presented to the board for consideration did not include the most recent edits that had been made by an individual board director and the school's attorney. Those edits were not produced for the board's consideration prior to the vote.

While the law places all fault at the feet of the governing board, it is concerning that the board chair reported repeatedly receiving poor guidance with regard to communication with the authorizer by a company well experienced in Idaho's charter sector, and that the board's votes have been influenced by entities with financial interest in the outcomes (specifically with regard to facility funding).

2. The school's attorney also serves as legal counsel to EAF and BLUUM. It is not clear that the governing board sought legal counsel "independent of the party with whom they are contracting for purposes of reviewing the school's management contract". This is potentially a violation of 33-5206(10)(g).
3. The CA board executed and began acting on a major amendment to its operating contract on May 11th without seeking approval from the authorizer of that contract. Additionally, not only did the governing board fail to properly inform the authorizer

of known issues that may impact its ability to continue operations, (specifically financial and staffing issues), but it also resisted taking the proper action for more than 30 days after being informed by IPCSC staff. At this time, CA is operating out of compliance with the terms of its existing Performance Certificate, several sections of IDAPA 08.02.04, and may also be in violation of some sections of Idaho Code as noted above.

4. Because the board failed to communicate with the authorizer as required, the school could not meet the IPCSC meeting materials due date of May 10th. The IPCSC Director agreed to extend the materials due date to May 24th. However, this means that the Boise School District was given less than 30 days' notice of an IPCSC agenda item that may impact the operations of its schools and IPCSC staff has had limited time to evaluate the materials presented.
5. With enrollment below 40 students, and uncertain philanthropic commitment, the school is in financial failure.
6. Without the management agreement, the school is entirely unstaffed. Administration and all staff worked their final day on 6/2/22. The school is entirely reliant on the management services contract for operations. Failure to properly staff the school is a responsibility of the board established in IDAPA 08.02.04.300.01.

IN SUMMARY

The operational and financial outcomes of CA do not meet the IPCSC framework standards, and the school is not in good standing in either category. (Academic data is not yet available). It does not appear that the governing board is governing well. In the past, the IPCSC has not approved amendment requests to a school not in good standing.

On the other hand, the CA governing board, while ultimately responsible for this situation, may not have been receiving sufficient information from its trusted sources. In other similar cases, a courtesy letter has been issued and the board has the remainder of its performance certificate term to evidence improvements.

Additionally, approximately 20 at-risk students are within 30 days of graduation. Considering that stable relationships and continuity of routine are primary factors in at-risk students achieving academic success, and that the school had only one option to avoid mid-year closure, the CA board opted to accept the continuation plan and sign the professional services agreement before requesting an amendment from the IPCSC.

The IPCSC must now decide whether to approve or deny the amendment.

SPEAKER

Board Chair, Patricia Kempthorne

IMPACT

If the Commission approves the amendment as requested, a revised certificate will be executed and the school can proceed with operating as an EAF managed school as presented in the amendment request.

If the Commission denies the amendment, the existing Performance Certificate will remain in effect and the school can continue to offer an instructional model designed to meet the unique needs of pregnant and parenting teens, but will need to rehire according to the existing org chart.

If the Commission denies the amendment, it is our understanding that JKAF will cease funding and the school will be forced to close its doors at the end of the current fiscal year. Cardinal Academy could appeal an IPCSC decision to deny the amendment request to the State Board of Education.

STAFF COMMENTS AND RECOMMENDATIONS

Staff recommends that the IPCSC approve the amendment as presented.

Director Thompson expresses concern about several aspects of this transition including the board's lack of ability to act autonomously, the cavalier approach to non-compliance, the general hastiness with which this decision has been made, and the lack of public transparency of the circumstances. The school's annual performance report will identify the areas of necessary improvement for the purposes of charter renewal.

In the future, the IPCSC should strongly consider denial of any application for which funding is not wholly and verifiably received by the school as a means of protecting a governing board from being unduly influenced by private sector entities.

The IPCSC is also encouraged to consider the precedent this decision will set for other education services providers seeking to execute management services agreements in Idaho. These issues are addressed in the "other statutory considerations" document included in these materials.

COMMISSION ACTION

A motion to approve the performance certificate amendment for Cardinal Academy as presented;

OR

A motion to deny the performance certificate amendment for Cardinal Academy as presented.



Cardinal

A C A D E M Y

9492 W Emerald St,
Boise, ID 83704
(208) 918-1693

May 24, 2022

Dear Idaho Public Charter School Commissioners and Staff,

This amendment petition is submitted on behalf of the Cardinal Academy Board of Directors. The board is seeking to contract with outside leadership support to ensure the success of Cardinal Academy. Our mission to serve pregnant and parenting students remains strong. Additionally, our primary attendance area and enrollment cap are unaltered. The amendment to the charter includes new leadership, enhanced retention strategies, and a new learning management system.

Sincerely,



Patricia Kempthorne

The Cardinal Academy Board of Directors



Public Charter School

Serving 9th - 12th Grade Students

Opening August of 2021

Ada County, Idaho

Serving the Boise, West Ada, and Kuna School Districts

Submission Date: September 1, 2020

Revision Submitted: November 9, 2020

Amendment Submitted: May 24, 2022

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Executive Summary

Mission Statement

Cardinal Academy will provide a rigorous academic program to pregnant and parenting teens in a supportive environment where students are prepared for parenthood, college, career, and life.

Cardinal Academy Public Charter School is an alternative high school and specialty program of opportunity focusing on at-risk pregnant and parenting teens and young adults grades 9 through 12. The school is founded by veteran academic and career counselor, Emily Bergstrom, and veteran educator, Deborah Hedden-Nicely, who have almost 30 years combined experience

at the former Booth Marian Pritchett School for pregnant and parenting teens and young adults in Boise. The governing board, leadership team and faculty founders will take a comprehensive approach of educating the whole person by providing students with a rigorous and relevant educational experience *and* providing on-campus wrap-around services necessary to support pregnant and parenting students staying in school. This will enable students to continue to pursue the completion of a high school education through graduation and beyond. In collaboration with faculty advisors an academic/career counselor, students will develop and “own” their educational future by mapping personal educational goals and plans. The governing board will monitor students’ academic growth will be monitored using the Renaissance Learning Star Math and Reading assessments, content based formative, informal and summative assessments, and standardized statewide assessments.

According to the National Dropout Prevention Center/Network, “only about 50% of teen mothers get a high school diploma by age 22, compared with 89% of women who did not have a child during their teen years, and one-third of teen mothers never get a diploma or GED.” Who does this affect? Not only the mother/student, but their child, the community, and ultimately our State and nation. Most dropouts are unemployed and when they do get a job, they earn low wages, and as a result will be forced to rely on public and charitable support. In Ada County, according to the Centers for Disease Control WONDER Database, in 2016, there were 81 females under the age of 19 that gave birth and did not have a high school diploma. In 2017 there were 81, and in 2018 there were 72. Clearly there is a demonstrated need to ensure young parents complete their high school education with a plan for a healthy and prosperous future. (Please see Appendix F9, Fig. 1 (page 189) for data verification from CDC WONDER.)

Cardinal Academy will operate a year-round model *and with new approaches to retention and a staff member dedicated to recruitment we believe the goal of 60 students is achievable in the academic year 2022-2023. with a target population for the 2022-2023 n optimal enrollment of 60 students and anticipate approximately 20 students enrolled in the summer program. Our projected goal for 2024-2027 would be 75 students enrolled each year with 30-45 in the Summer Program enrollment. 120 students, not to exceed 140.*

The students will attend school 5 days a week, 4 of which will be devoted to class time and 1 that will be for extensions and credit recovery. This will provide more consistency for students and shorter class periods. *attend five days a week.* Cardinal Academy’s primary focus is to ensure that the students have the opportunity to fully build their academic capacity in an

environment that supports them through their pregnancy and early parenting with knowledge and life/job skills. ~~This is accomplished through intentional collaboration with our primary partner, The Salvation Army, Boise Corps—offering the Booth Program for Young Parents—and other community partnerships and careful hiring of highly qualified faculty and staff with experience serving at-risk pregnant and parenting students/youth. All Cardinal Academy staff and Booth Program staff will undergo professional development specifically tailored to prepare them to handle the unique circumstances that may arise in this student population.~~ Cardinal Academy's primary goal is to provide a **caring learning community** in order to instill in our students a love for life-long **learning, empowering** them to progress to other pursuits such as college or career, thus becoming **contributing** members of their **community**. Students will acquire knowledge and essential skills for a healthy pregnancy and parenting with completion of a high school education and a plan for post-secondary education/career that affords their family a successful life.

Educational Program

Description of Educational Philosophy

Vision

*Cardinal Academy envisions a world where pregnant and parenting students up to the age of 21 are **empowered** to complete their high school education in a **caring learning community**, further their education and career paths, and become self-sustaining and **contributing** members of their **community** and local economy.*

Cardinal Academy will operate with three guiding principles:

1. ***Pregnant and parenting students should have the opportunity to engage in a rigorous and relevant educational experience that they have participated in creating and that prepares them for a prosperous future.***

Cardinal Academy will take a comprehensive approach of educating the whole person by providing students with a rigorous and relevant educational experience **and** providing on-campus wrap-around services necessary to support pregnant and parenting students staying in school. This will enable students to continue to pursue the completion of a high school education through graduation and beyond. In collaboration with an academic/career counselor, students will develop and “own” their educational future by mapping personal educational goals and plans. Students’ academic growth will be monitored using the Idaho Standards Achievement Test (ISAT), Renaissance Learning Star Math and Reading assessments, content based formative, informal, and summative assessment.

Upon enrollment, ~~a faculty advisor the academic/career counselor~~ will meet with the student to develop an Individualized Learning Plan (ILP). **Together, the ~~faculty advisor~~counselor and student will:**

- Examine, consider, and develop student’s pursuits, career interests and aptitudes;
- Discuss transcripts and any standardized test scores, such as the Idaho Standards Achievement Test (ISATs), Scholastic Achievement Test (SAT), or American College Testing (ACT);
- Upon enrollment each student will take the Renaissance Star math and reading assessments to determine an entry baseline;
- Map out short-term and long-term goals; and,
- Develop a learning plan, including specific courses **and the opportunity to explore potential**, internships, and apprenticeships.

Throughout their tenure at Cardinal Academy, students will continue to work with the ~~faculty advisor~~academic/career counselor to:

- ~~Enroll in TRiO to explore career choices, and the education, years of course study required, and funding needed to attain those careers;~~
- Work on financial aid to complete post-secondary goals; and,

- Monitor progress of goals and academic achievement that will lead to goal attainment.

Individualized Learning Plans will be distributed and discussed among the teachers in order for meaningful, relevant lesson development through the use of ~~Mastery-based Curriculum Layered Curriculum (See Layered Curriculum under Instructional Model)~~. Cardinal Academy will provide students with content that is rigorous, learner-centered, connected to their self-created ILP, and integrated with skills to prepare them for the workplace, university or college. ~~Layered Curriculum~~ unit lessons are created to scaffold, individualize, and differentiate learning. Each ~~level~~ ~~layer~~ builds on students' learning and moves from acquiring knowledge, to transfer of knowledge by applying and demonstrating what students have learned.

2. Pregnant and parenting students need basic essential support in order for learning to occur.

Young students that become pregnant need specialized support to develop skills and earn credentials critical to their success as adults and as parents. Providing essential support during this critical time can help to avoid a life of poverty and dependence on public or charitable assistance. Cardinal Academy's educational plan leverages years of experience working with this at-risk population with a customized program meeting the complex individual needs of each student. Our philosophy centers around building a stable foundation where a student can continue to learn, develop a growth mindset, and take control of their future.

*Pregnant and parenting teens need a **safe** learning environment free of prejudice.* Many young women who become pregnant have already had one or more Adverse Childhood Experiences (ACES) and trauma in their life (Hillis, et al, 2014). Becoming pregnant at an early age is just one more. The prejudice faced by pregnant and parenting students presents a great educational barrier (NWLC, 2011). [\(Click here for link to video about Adverse Childhood Experiences\)](#)

~~Cardinal Academy's founding staff members, Emily Bergstrom and Deborah Hedden Nicely, have more than 30 combined years of experience working with pregnant and parenting teens. As long-time staff members at the former Booth Marian Pritchett School (BMPS) in Boise, Emily and Deborah have learned that most students chose to attend BMPS to escape the stigma associated with being pregnant, or being a young parent, in a traditional high school.~~

Teen parents are often judged harshly by their peers and sometimes by adults who do not understand their situation. This contributes to the high dropout rate for young parents. Louree Ortiz, BMPS 2020 graduate said, "I was scared and alone when I found out at 15 years old that I was pregnant. So many people called me names and I lost my 'friends.' I tried to hide my pregnancy for so long, but people finally started staring. I went to a private school and all I got was whispers to the point I wasn't going to school. I dropped out and my whole family was disappointed. I just cried everyday not knowing what to do. I then found out about this teen mom school. I felt so welcomed and all of the teen moms were so excited to talk to me and tell me their stories."

When the Boise School District closed the Booth Marian Pritchett School in May of 2020, they intended for any pregnant and parenting students to attend the alternative high school. Another student at BMPS, who will be a sophomore next year, said she did not want to attend Frank



Maslow's hierarchy of needs

Figure 1: "Students in classrooms or training courses may be distracted. They have other considerations running through their minds, such as their other classes, personal lives, friendships, hobbies, physical distractions like hunger or tiredness, and so much more. When students are sidetracked by these or any other issues, their own education and accomplishment may be prioritized below their more immediate needs. Why is this? One human psychologist suggests that this occurs because immediate needs determine the immediate action of the student. When they are worried about these things, they focus solely on those distractions. Those preoccupations will take priority over education and accomplishment. What's the best way to capture our students' attention and get them to prioritize education? Teachers can assist students in eliminating their distractions, allowing the student's top priority to become course material, education, and accomplishment." **Source:** <https://educationlibrary.org/maslows-hierarchy-of-needs-in-education/>

Church High School because "...the kids there are troubled and I wouldn't feel safe and I would not be happy going there. They say it's not a school for troubled kids, but that is exactly what it is. I'm trying to better my life, not make it worse." She adds that she transferred from a West Ada high school because "being pregnant around a bunch of immature teens does not make the social aspect part of school good."

*Pregnant and parenting teens must have **basic needs** met for successful learning.* Attending to the bottom of Jacob Maslow's hierarchy (*Fig. 1*), Cardinal Academy will remove barriers such as transportation, lack of resources for food, living, childcare, and stigma. Through collaborative community partnerships essential services will be provided on-campus, in a caring and nurturing environment, facilitating academic study focused on students achieving their highest academic potential. Cardinal Academy's most important partnership is with The Salvation Army, Boise Corps, who has served pregnant young women for almost 100 years. The Salvation Army will lease Cardinal Academy their new state-of-the-art school building, will provide food services and student transportation. Additional student services provided by The Salvation Army include coordinating with the on-site childcare, awarding child care payment scholarships, social work services, and operation of the student store.

According to a Bill and Melinda Gates Foundation survey (2011), pregnant and parenting students expressed that they would have stayed in school if their school provided necessary services and “demanded more of them”. Many pregnant and parenting students are considered low academic achievers; and perhaps, on paper, it appears that way. Cardinal Academy, like the Booth Marian Pritchett School before it, will be a place where students can achieve great heights academically while participating in a learning community filled with inquiry, curiosity, and inspiration, when given assistance with basic needs.

Students will be continuously moving forward to meet individual achievement goals in order to reach post-secondary education or career potential. According to the U.S. Department of Education, Office of Civil Rights publication, *Supporting Academic Success of Pregnant and Parenting Students* (June 2013), Title IX **does not require** school districts, their high schools or their alternative high schools, to establish programs designed to support teen parents, such as on-campus pre- and post-natal classes, child development and life skills classes or provide child care or early learning opportunities for students’ child(ren), or provide physical and mental health, WIC and Head Start appointments. However, Title IX **does protect** a pregnant or parenting student from being asked to leave their regular or alternative school due to her pregnancy. But pregnant and parenting students are still left to struggle with attending to the needs of being pregnant or managing a baby by themselves, leaving no time or energy for academics.

*Pregnant and parenting teens need a **stable and consistent** environment.* When a young student becomes pregnant their life can seem to spiral out of control and many lose hope and drop out of school, condemning themselves to a life of poverty and dependence on public and charitable assistance. Teen mothers have lower levels of socioeconomic attainment than their childless peers: they are less likely to complete high school, attend college, or earn a bachelor’s degree, and they tend to earn less and are more likely to experience poverty (Diaz and Fiel 2016). Further, children of teenage mothers exhibit lower cognitive and noncognitive skills and are more likely to become parents as teenagers themselves (Diaz and Fiel, 2016). Single mothers without a high school diploma are almost five times more likely to live in poverty and depend on public assistance than a single mother with a bachelor’s degree (IWPR, 2015). According to the National Dropout Prevention Center/Network, 50 percent of pregnant teens dropout of school and do not complete their high school education. Less than 2 percent go on to higher education. Cardinal Academy will be a safe, caring community where vulnerable students will receive comprehensive wrap-around social, mental, medical, and child care services on campus by trusted staff members. Providing these services will support students in focusing on their academics to move them toward proficiency, and onto their college and career goals.

3. *Pregnant and parenting students will benefit from a values-driven school culture that empowers them to be life-long learners who are engaged in civic pursuits and contribute to their community.*

Cardinal Academy’s core values were established to embed the following elements into the school community. The core values will be practiced by all students, faculty, staff, and collaborators of the school, throughout the campus and in our daily interactions.

Core Values

Learning. Cardinal Academy believes that learning is fundamental and leads to a multitude of opportunities for our students. Learning will empower and equip our students with the knowledge, skills, and critical thinking that will enable them to pursue a life of learning and apply that learning to gain prosperity and contribute to their community.

Empowering. Cardinal Academy believes that students will flourish in an environment focused on a growth mindset, resilience, hard work and perseverance. Students who are empowered with a growth mindset welcome challenges, persevere when tested, and see effort as a way to learn as a life-long pursuit. Empowerment focuses on a student's ability to bounce back from challenges, possess courage and resolve, and instills confidence in pursuit of their high school education and transition into career or college.

Contributing. Cardinal Academy believes in inspiring community engagement and civic responsibility in our students, first by contributing to their school community. Through content courses, collaborating partnership opportunities, community service projects, mentorships, and internships, the teachers, mentors, and collaborating partners will lead by example and show students how contributing to their communities in a variety of ways, makes a better place for all.

Caring. Cardinal Academy believes that when students are recipients of a caring environment and atmosphere, they themselves will take on this perspective and care about others, their school, and community. In an article for the Journal of Online Learning Research, Karis K. Barnett of The University of Central Oklahoma stated there are numerous studies addressing what effects at-risk students and dropout rates (2016). "One such influence is the essential concept of caring...caring can be conveyed through active teacher/student relationships." (Barnett, 2016) When caring, understanding, and support is practiced together with learning, students are empowered and inspired to attend school, learn, and succeed.

Community. Cardinal Academy believes in establishing a caring school community where students enjoy learning, which empowers them to complete their high school education and embark on a career or college experience leading to opportunities and choices for prosperity and economic and civic contribution.

Student Academic Achievement Standards

The mission of Cardinal Academy is to provide a rigorous academic program in a supportive environment where students are prepared for parenthood, college, career, and life. Cardinal Academy's academic goals are directly connected to that mission and establish high expectations for the school's students.

First and foremost, the school's goals fully align to meet or exceed the academic standards of the Public Charter School Commission's Performance Framework:

	Meets	Exceeds
Math and ELA Proficiency	Proficiency is equal to the mean or falls between the mean and one standard deviation above the mean of the identified comparison group.	Proficiency is greater than one standard deviation above the mean of the identified comparison group or in the 90 th percentile of all Idaho public schools.
College and Career Readiness	a 4-year or 5-year ACGR is equal to the mean or falls between the mean and one standard deviation above the mean of the identified comparison group.	Greater than one standard deviation above the identified comparison group or is equal to 100 percent.
Literacy Proficiency	Proficiency on the spring administration of the statewide literacy assessment is equal to the mean or falls between the mean and one standard deviation above the mean of the identified comparison group; OR the fall to spring change in proficiency rate is between 10 percent and 19 percent.	Proficiency on the spring administration of the statewide literacy assessment is greater than one standard deviation above the mean of the identified comparison group; OR the fall to spring change in proficiency rate is 20 percent or greater.
Alternative Math and ELA Content Mastery	The percentage of continuously enrolled students who have either already completed ELA/Math graduation requirements or successfully earned credit for the equivalent of one year of instruction is equal to or up to 10 percent greater than the school's percentage in the previous year.	The percentage of continuously enrolled students who have either already completed ELA/Math graduation requirements or successfully earned credit for the equivalent of one year of instruction is more than 10 percent greater than the school's percentage in the previous year; OR the percentage in the current year is greater than 80 percent.

Alternative 9-12 Progress Toward Graduation	The percentage of students who either completed 3 credits for every 45 days enrolled (if enrolled for at least 45 days but not continuously enrolled) or completed 11 ½ credits (if continuously enrolled) is equal to or up to 10 percent above the school's percentage in the previous year.	The percentage of students who either completed 3 credits for every 45 days enrolled (if enrolled for at least 45 days but not continuously enrolled) or completed 11 ½ credits (if continuously enrolled) is more than 10 percent above the school's percentage in the previous year, OR the percentage in the current year is greater than 80 percent.
Alternative College and Career Readiness	The percentage of the not continuously enrolled students who were enrolled for at least 45 days and were eligible to graduate in the same academic year (plus summer) who graduated is equal to or up to 10 percent greater than the school's percentage in the previous year.	The percentage of the not continuously enrolled students who were enrolled for at least 45 days and were eligible to graduate in the same academic year (plus summer) who graduated is more than 10 percent greater than the school's percentage in the previous year, OR the percentage in the current year is greater than 75 percent.

Because of Cardinal Academy's unique student population, the school will be applying for alternative school status and plans to include the Commission's alternative school standards among its academic goals.

In addition to the Public Charter School Commission's academic standard, Cardinal Academy has established the following high standards:

- 100 percent of graduating students will pass the state civics exam;
- 90 percent of students will (a) have established career goals or secured a job in a career of choice, or (b) have been accepted by a post-secondary institution; and,
- 90 percent of students will be proficient in the knowledge and skills for a healthy pregnancy, child development, and other parenting best practices, as measured by school-developed assessments.

Statewide and Standardized Assessments

Cardinal Academy students will participate in all state-mandated testing as required by Idaho Code, including ISAT, ISAT Alt, PSAT and SAT. The school's Director of Academics will be responsible for testing, and ensuring the testing procedures outlined by the Idaho State Department of Education (SDE) are followed. Students will take the standardized tests during the state-mandated testing windows as outlined by the SDE. Teachers will use time in the Professional Learning Communities (PLC) to analyze, evaluate, and discuss the data in order to inform and adjust instruction to align with the needs of the students.

Formative and Summative Assessments

Cardinal Academy will utilize both formative and summative assessments to measure student progress. Teachers will use the data from these assessments to inform and plan their instruction and ensure students are progressing toward their ILP goals. Informal assessments will occur in classrooms where teachers use strategies such as oral defense or exit tickets to assess students' learning. Summative assessments will be utilized at the end of content units. A variety of summative assessments will be utilized. For example, a written essay, a research paper or oral defense presentation, a completed project, or a paper and pencil test. Summative assessments will be aligned to the standards.

All students will take a college entrance exam during their junior year and the civics exam during their senior year. Additionally, each student will complete a senior project. The senior project is intended to be a culmination of each student's academic knowledge, skills, and experiences from their high school career. The project encourages students to think about issues, challenges, and problems, and to seek answers by developing higher order thinking questions that direct their inquiry to find research-based answers that are then produced in a written argument, portfolio, presentation, or product. Students will learn to cite evidence of their claims within a written document and in a works cited page. **These are the skills students will need at university or college as well as in the workplace.** This project will be an opportunity for thoughtful reflection on how a parenting students' goals may have morphed throughout high school and their goals following graduation.

Description of Key Design Elements, Curricula, Tools and Instructional Methods

Cardinal Academy will be a year-round, five-days a week school in order to provide continuity in learning and to prevent a break in the essential wrap-around services that our students and growing families need and depend on during this critical time in their education and life. Missing almost three months during the summer severs ties to not only learning, but to the trusted faculty and staff, and services such as WIC, pregnancy and parenting classes, the school store, and quality childcare. Learning gaps and lack of services can trigger adverse experiences that lead to dropout and other negative consequences. Keeping students at Cardinal Academy engaged and inspired in their academics as well as their growing knowledge of pregnancy and parenthood, is critical to their success. Barnett (2016) states that when at-risk students are out of school too long, they can become isolated and estranged from school, and dropping out can occur. She goes

on to say that “school engagement and school membership,” are key to preventing students dropping out of school.

Academic learning at Cardinal Academy will be aligned to the **Idaho State Standards** and will provide highly rigorous, learner-centered, differentiated learning. In her article, Barnett (2016) states that effective at-risk programs and strategies for at-risk students include “customized approaches, individualized instruction, low-student teacher ratio, and distinctive curriculum and instructional methods.” Cardinal Academy class size will average 12-15 students and courses will correspond with students' individual learning plans (ILP) and with their college or career goals. Under the guidance of the academic/career counselor, students will understand **why** they are taking particular courses, and **how** the courses are connected to their goals. All highly qualified faculty will be well informed of students' plans in order to support instruction and differentiation. Students having goals embedded in a learning plan that they themselves have developed, will promote confidence and security that accomplishments in school will lead to participation in a career of choice, earning a salary that enables financial support for themselves and their family resulting in a life of success and contribution.

Students will be provided with opportunities to take AP and Dual Credit courses. AP will be offered on campus through our partnership with Boise State University's Computer Science program. Additional AP courses can be accessed through on-line learning platforms such as the Idaho Digital Learning Academy. Dual Credit can be accessed from school or through College of Western Idaho's Ada County campus due to its proximity to Cardinal Academy. Students will be encouraged to take advantage of Advanced Opportunities to take more rigorous courses and, in some cases, facilitate early graduation.

Students at Cardinal Academy will **complete the High School Graduation Minimum Requirements as set forth by the Idaho State Department of Education and IDAPA 08.02.03, 104, 105, and 106, earning at least 46 credits.**

Curricula and Course Descriptions

All curriculum is designed by teachers through an integrated, project-based program built from state standards. It is evaluated at the end of each term for student success and modified to better help students ~~each~~ achieve mastery through teacher collaboration. Teachers will pull from a variety of resources and ~~from~~ the shared library on the Learning Management System of LiFT. LiFT is a cloud based Learning Management System built for Mastery Learning. It is designed to track student mastery of standards using a scaffolded approach.

Literature and Humanities

Cardinal Academy will **offer 8 credits of English Language Arts.** ~~Cardinal Academy will utilize the Baltimore County Public Schools curriculum for ELA.~~ This curriculum aligns with Idaho Core State Standards, is guided by essential questions, and provides end of unit and end of course assessments. The curriculum makes meaningful, relevant connections between the literature and students' contemporary lives, engaging them and immersing them in literary study that they perceive as interesting. **At least 7 credits of the core Social Studies courses** will be

offered at Cardinal Academy. Curriculum from iCivics, JA Economics, New Visions for Public School will be utilized.

Throughout the study of literature and humanities, students will be challenged to analyze and interpret information, and synthesize information in writing. Students will access diverse and varied assigned texts, develop and conduct inquiry-based projects using their knowledge, producing a written argument that demonstrates discourse about the chosen topic. In addition, cultural, social, geographical, and historical context will be analyzed and compared with contemporary issues for students to make meaningful, relevant connections to their studies. Lessons are active and engaging and engender conversations, including interactive simulations encouraging teamwork and cooperative learning. Much of the curricular materials offer high quality digital resources that are easily adapted and differentiated for at-risk learners in the classroom and provide end of unit and end of course assessments.

Math and Science

At least 6 credits of core Math classes will be offered. Cardinal Academy plans to use the student-centered, problem-based and Idaho Core Standards aligned ~~College Preparatory Math (CPM)~~ curriculum. These instructional ~~methods materials~~ work well with at-risk students as they emphasize students working in small groups or pairs to combine efforts in solving real-life scenarios with math problem solving. ~~The course materials balance procedural fluency (algorithms and basic skills), deep conceptual understanding, strategic competence (problem solving), and adaptive reasoning (application and extension).~~

Cardinal Academy will offer **6 credits in Science**. The science courses will be lab and inquiry-based with emphasis on projects, observations and investigation in the classroom and field studies. Students answer a central question for themselves, discovering learning through a series of guided discussions, experiments, and hands-on activities over several class periods. Each unit incorporates a culminating project as the final assessment in which students research a topic, synthesize their research and apply and demonstrate what they know.

A **Physical Education** course will be offered to all students and will include personal health and physical fitness. Students will learn about the benefits of physical exercise, healthy nutrition, self-care, mindfulness, yoga, and meditation.

Electives

Cardinal Academy students will need to complete **at least 17 elective credits**. Through the new program under the Idaho Division of Career Technical Education, the school will offer several electives in **Business Education and Family and Consumer Science**.

The business teacher and school leaders will collaborate with industry experts to form a technical advisory committee for Business Education. The elective offerings are critical in developing students' computer knowledge and skills, as well as preparing them for career, college and personal use. Additionally, the elective choices are centered on empowering teens and young

adults to make informed personal financial decisions, while providing practical, real-life connections to our students' lives and increasing relevance and meaning for them.

The Family and Consumer Science teacher will also form a technical advisory committee for Family and Consumer Science Education. Courses such as Child Development allows students to learn the importance of reading to their child beginning at an early age as well as playing fun basic math games and using math manipulatives to teach math. Instruction on the relevance of literacy and numeracy at an early age, and of imagination-play, is also part of the elective course. Students can utilize the brand new on-campus child care facility for their children, newborn to 5-years, and preschool classes will be available to students' children when they reach age three. Head Start will be on campus to enlist the students from pregnancy through to when the child(ren) is eligible for Head Start classes.

In addition to the above electives, Cardinal Academy will offer a critically important course, the **Resilience and Well-being elective**. This class will cover such topics as: Child Development; Pregnancy and Parenting; Food and Nutrition; Resilience and grit (Angela Duckworth); Self-regulation through mindfulness and meditation; Growth Mindset (Carol Dweck); Legal matters for parents; Vulnerability (Brene Brown); Brain Development and learning; Personal and Consumer finance; Decision Making; and, Healthy Relationships and Communication.

Cardinal Academy is decisively affecting two generations: our students, and their child(ren), who will become students in the near future. The Resilience and Well-Being course study includes classes that instruct students on healthy pregnancy for a healthy outcome, food and nutrition for mom, baby and family, and current information and skills with regard to parenting and child development.

Content Area	Course Offering	Credits Earned
Literature and Humanities	English I	2
	English II	2
	English III	2
	English IV	2
	American Government	2
	Economics	1
	US History I	2
	US History II	2
	Speech	1

Math and Science *in addition to Algebra and Geometry, students must have 2 more credits of Math during their senior year for a total of 6	Algebra	2
	Geometry	2
	Algebra II *	2
	Pre-Calculus*	2
	Calculus*	2
	Personal Family Finance*	2
	Physical Science	2
	Biology	2
	Environmental Science or	2
	Anatomy and Physiology	1-2
	Physical Education	1-2
Electives	Business Education	
	Computer Applications	1
	Personal Finance	1
	Bookkeeping	1
	Foundations in Marketing	1
	Entrepreneurship	1
	Family & Consumer Science	
	Parenting and Child Development	1-2
	Adult Living I & II	1-2
	Healthy Living, Healthy World	1
	Nutrition & Foods	1
	Early Childhood	
	Professions I & II	2-4
	Education Assistant I & II	4-8
	Other	
	Resilience & Well-Being	1-2
	Work-Based Learning	1-4
	Physical Education	1 - 2

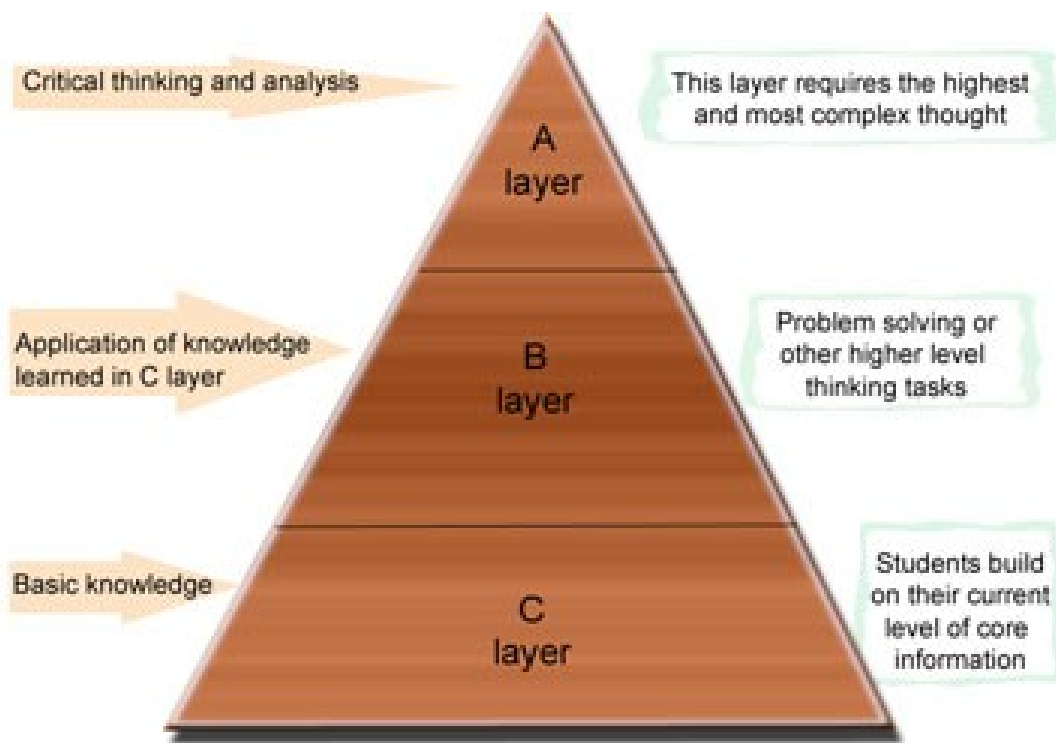
❖ See Appendix F7 for more detailed information on curriculum.

Instructional Model

Cardinal Academy will employ the **Layered Curriculum** instructional model developed and used by Kathie F. Nunley, Ed.D. (Curriculum Vitae, Dr. Nunley: <http://help4teachers.com/about.htm>)

The main elements of the Layered Curriculum Instructional Model include:

- Individualized instruction;
- Differentiated assignments and assessments;
- Different expectations for different students even with the same assignment;
- Same objectives, different ways of achieving them; and,
- Emphasis on personal growth from different starting points.



<https://www.edunators.com/articles/classroom-strategies/differentiating-instruction-using-layered-curriculum>

Students begin with **Layer C** to build background, knowledge and activate prior knowledge. This layer consists of a wide variety of assignment **choices**. Students learn basic facts, content, skills, and vocabulary. **Layer B** involves application and problem-solving. The **B** layer offers an assortment of projects or labs and other problem solving activities to **choose** from which allow students to **demonstrate** an application of the knowledge and skills gained in the **Layer C**. **Layer A** moves students into critical thinking and analysis. The **A** layer requires students to critically analyze a current issue of their choice in the real world which relates to the unit of study.

John J. Medina, Professor of Bioengineering at the University of Washington, and author of the book *Brain Rules*, says “*Individually, the worst kind of stress is the feeling that you have no control over the problem - you are helpless.*” (Medina 2014) What can help alleviate the stress of having no control? Dr. Medina says **choice**. According to Dr. Nunley, when the brain is on constant guard, in fight or flight, victim mode, it is difficult to be creative or learn. Most of Cardinal Academy’s students have experienced and/or continue to experience adverse childhood experiences and trauma. They have little or no control over their life. Affording the students some choice in their educational pathway and goals, as well as in their daily lessons allows students to have a sense of control, thus allowing them to fully engage in academics. Dr. Nunley further says that “*offering even a simple choice allows students to shift out of their primitive brain, allowing their higher brain (cortex) to engage which gives them the opportunity to be the master of their learning.*” (Nunley 2004)

According to Dr. Medina, the brain processes meaning before detail and “likes” hierarchy, processing from the general to the specific. The Layered Curriculum starts with the general idea of a unit of study, **Layer C**, then digs deeper into the specifics through application in **Layers B** and **A**. Dr. Medina further says, “*...the relationship between repetition and memory is clear. **Deliberately re-expose yourself** to information if you want to retrieve it later. **Deliberately re-expose yourself** to information more elaborately if you want to remember more of the details. **Deliberately re-expose yourself** to the information more elaborately and in fixed, spaced intervals if you want the retrieval to be as vivid as possible.*” (Medina 2014) Layered Curriculum is a hierarchical system of learning which starts with core concepts and meaning (**Layer C**), then **re-exposes** students more elaborately by applying knowledge and demonstrate understanding (**Layer B**), concluding with **more exposure** by asking students to think critically about how the information connects to their world today (**Layer A**).

Accountability is paramount in the Layered Curriculum Instructional Model and is accomplished through **daily individual oral defense or exit tickets**, and:

- small group discussion;
- written quizzes and tests;
- daily and/or weekly check in with the teacher; and/or,
- presenting research projects.

There are many approaches built into the Layered Curriculum for students of all academic abilities to substantiate what they know, demonstrate the application of that knowledge, and think critically about the content. Teachers are responsive throughout the classroom, engaging with students in question/answer sessions and discussions as students continually relate to the teachers what they are learning.

Layered Curriculum content units can be fully electronic and shared for use in the classroom or at home during maternity leave, when a student or her/his child is sick, or during situations like the Covid-19 pandemic. Assignments can be turned into **a cloud based Learning Management System through LiFT**. ~~Google Classroom, and immediate formative feedback is shared using the Comment mode. Google Hangouts can be utilized for virtual instruction, discussions, and question/answer sessions.~~

Additionally, Google Classroom allows teachers and students to expand learning beyond the walls of the classroom. As aforementioned, students are able to access learning while on bedrest, during maternity leave or when a family member falls ill. Further, Cardinal Academy students will be familiar with the blended learning model in the event of another pandemic.

All teachers and staff will receive intensive LMS and technology training from academic and curricular liaison and administration. Other schools that use LiFT as a learning management system, have reported success using it as a cloud-based platform that supports mastery learning and enables a cross-disciplinary approach. LiFT also enables teachers to create a continuous feedback loop on assignments and projects, which benefits Layered curriculum and can be easily modified in house to be accessed virtually or in a blended model. This type of learning management system allows students to focus on learning skills with repeated attempts for improvement to reach mastery.

Benefits of Block Scheduling

Cardinal Academy will utilize the AB|AB|A and AB|AB|B block scheduling format for classes. For at-risk students, this schedule has many benefits: concentration on fewer classes enabling students to focus and learn more deeply toward mastery. The day is less hectic with more time in class learning with teachers' attention and peer collaboration. And students can finish high school early or easily recover lost credits. According to a study conducted by The LAB, a program of The Education Alliance at Brown University, "Time determines class schedules, structures the curriculum, influences teaching, and shapes the interactions between teachers and students... Time is lost in passing between classes, maintaining discipline, structuring classroom activities, and recordkeeping (1998)." Scheduling is critical and has far-reaching effects. Block scheduling with fewer class periods, saves time in passing, in recordkeeping, and provides more time for classroom learning, activities, projects and labs. Superintendent Cedric G. Clark says in an article for the National Association of Secondary Principals, that block scheduling provides more time in class, fewer classes and less information for students to process, and allows students the time to master concepts and develop skills (Clark, 2018). ¶

- **Learning:** With block scheduling there is more time for teachers to develop ideas and concepts in-depth, and for students to apply and demonstrate those concepts during the same period with teacher attention and scaffolding. Block scheduling is well suited for various types of activities and assessments, including project-based learning, scientific labs, field studies, field trips, and presentations. Block scheduling allows more time for students to interact with teachers and work collaboratively with peers. ¶
- **Focus:** Students can focus on fewer content areas in a day, more in-depth, thus mastering a topic of study rather than surveying it. With longer and fewer classes, learning is not as fragmented, and students spend less time in the halls changing classes and more time in class learning. ¶

- **Flexibility:** Block scheduling allows students to earn two more credits per year than the six or seven period day, enabling students to finish high school early. Block scheduling also enables students to recover credits without falling too far behind.¶¶
- **Interaction:** With fewer classes and longer class times, students will spend more time collaborating with their peers and teachers, and developing trusting relationships, an essential factor for learning for at-risk students. Also, teachers develop their Funds of Knowledge of students and can create lessons that intersect content with students' interests.¶¶
- **Calm Environment:** Block scheduling is less frantic with less changing of classrooms and content to study. Students can get more done in class with the scaffolding and attention of the teacher and have less homework. Homework is a barrier to completing high school for parenting students who need to attend to their child(ren) when at home or who must work in the off-school hours to support themselves and their families.

Strategies for Effectively Serving Special Populations

Cardinal Academy is uniquely equipped to serve special populations due to its small size and experienced staff. Our year round calendar expands access to services for all students. We recognize each student's learning path is individual and will serve students with diverse cognitive, physical and social and emotional needs. This will include English Learners (EL), students with intellectual, social emotional and physical disabilities, and Gifted and Talented Learners. Each student will receive equal access to educational opportunities. All of our students will learn in the least restrictive environment in the general education classes. Teachers will modify, differentiate, and accommodate for individual students' learning needs. This is readily accomplished with Layered Curriculum. The main elements of Layered Curriculum are individualization of instruction, differentiated assignments and assessments, different expectations for different students even with the same assignment, same objectives, different ways of achieving them; and an emphasis on personal growth from different starting points. Teachers can differentiate, for example, with assignment and assessment choices, shorter assignments and assessments, and reading assessments aloud to students.

Cardinal Academy's anticipated demographics: 20 percent Special Education, 90 percent Free and Reduced Lunch, 20 percent English Learners, and 15 percent homeless/foster care.

Cardinal Academy's supports for these special populations include:

- Bus services within the attendance zone beginning in year 1;
- Free breakfast and lunch program beginning in year 1;
- Work with our collaborative partner, The Salvation Army, to provide child care, and to provide child care scholarships and assistance in applying for the Idaho Child Care Program (ICCP), a program to help students pay for child care beginning year 1;
- Staff development on working with students and families from low socioeconomic situations;
- Staff development on incorporating effective EL strategies;
- Staff development on working with students with disabilities;

- Support for students and their families by partnering with community organizations;
- Teaching self-regulation and conflict resolution skills to all students;
- Contracting services for Speech Language Pathologists, Physical Therapy, Occupational Therapy and educational psychological testing as necessary;
- Cardinal Academy will hire a special education teacher its first year. The special education teacher will work with all members of the IEP team (parents, teachers, administrators and related service providers) to develop data-based, individualized educational plans that are aligned with student needs. This teacher will begin his or her contract earlier than the other teachers to ensure that SPED students are accommodated on the first day of school. Prior to the SPED teacher's contract, the Executive Director and Director of Academics will consult with the special education consultant for Bluum if any legal compliance questions or concerns arise.;
- Special education teacher collaboration with building staff implementing guidelines outlined in IDEA, Child Find and the Idaho Special Education Manual;
- An academic interventionist will be hired to work alongside the special education teacher and students to ensure students are receiving necessary support; and,
- Cardinal Academy faculty and staff will participate in professional development focused on working with students from low income, English learner, and traumatized backgrounds.

Child Find

Cardinal Academy will develop a Response to Intervention (RTI) process that addresses building-wide intervention needs for all students. The RTI team will work together to gather parent input, review data, problem-solve, and develop/adjust interventions for students needing specific targeted instruction in academic, behavioral, and/or social domains. The team will monitor student progress regularly to assure that any referrals to consider consent for evaluation are considered as appropriate.

Discipline

Cardinal Academy believes in restorative practices which focuses on mediation and agreement rather than punishment. The guidelines provided by the IDEA and the Idaho Special Education Manual will be followed in regards to disciplining students with disabilities. If a student currently has a Behavior Intervention Plan (BIP), the plan will be reviewed to determine if intervention and response steps were implemented appropriately in a given disciplinary situation. If a BIP is not in place, the IEP team will meet to determine if a Functional Behavioral Assessment is appropriate. A Behavior Intervention Plan may be implemented if the special education team determines that the behavior of the student impacts their learning and/or the learning of others. This intervention, if deemed necessary, would be included in the IEP.

Counseling, both individual and group, will be available to all students, including those with disabilities. Mental wellness is a priority at Cardinal Academy. We believe all at-risk students should have access to this service on-site.

Gifted and Talented

Gifted and Talented students will be provided with accelerated programs and enrichment of curriculum to provide a challenging educational experience.

English Language Learners (ELs)

Cardinal Academy will use a home-language survey upon student enrollment to identify English Learners as defined by Title III and IX of the ESEA. Students for whom English is a second language will be assessed using the EL placement test.

Cardinal Academy will use instructional approaches such as Sheltered Instructional Observation Protocol (SIOP) to support ELs across the curriculum. Students will work towards proficiency in reading, writing, speaking and listening. An Educational Learning Plan (ELP) including curriculum, teaching strategies, academic goals and assessment accommodations will be developed.

Student growth will be monitored and students can be exited from the EL program once they meet recommended levels of proficiency on the Idaho English Language Proficiency Assessment or other assessments.

Section 504

Any student with a mental or physical impairment that substantially limits one or more major life activities is entitled to a Section 504 Accommodation Plan. Once identified, a team of knowledgeable individuals, including the student's parents will move forward with the Section 504 process. Section 504 is not special education. The 504 process will be coordinated by the school counselor. Section 504 responsibilities are clearly outlined and will be followed by Cardinal Academy. The Board of Directors will develop a process for grievance and 504 hearing procedures for Cardinal Academy.

Title IX

Pregnant and parenting students are protected under Title IX of the Education Amendments of 1972. Students are encouraged to take two weeks (14 days) off of school for a regular birth and three weeks (21 days) off of school for a cesarean birth. These are the generally accepted "medically necessary" time periods agreed to by the student's medical provider. Students are able to make up all work missed due to pregnancy related conditions, including childbirth, and are encouraged to complete work from home to the best of their ability. Blended learning allows for greater access to teachers and class work during times of absence. Students are allowed reasonable breaks to access private spaces for breast milk expression and are allowed and encouraged to feed their newborn children in the classroom to the degree which they are comfortable.

We educate students about their legal right to attend any school they desire while pregnant and parenting. They are not required to attend a special program and sometimes feel forced to do so due to discriminatory leave policies. However, most pregnant and parenting students will be

drawn to enroll in our program due to access to affordable childcare, being part of a community of peers who understand the joys and challenges of being a young parent, supportive staff and the broad range of other services provided by Cardinal Academy.

Homeless and Housing-Unstable Student

Pregnant and parenting students sometimes face homelessness or housing instability. In fact, pregnancy can be a risk factor for homelessness. At Cardinal Academy, homeless students will work with social workers to ensure their needs are being met and that all possible measures are taken to try to keep them in school. These services may include connecting them to services for stable housing, providing meals, allowing use of laundry facilities and showers, counseling, and others. Homeless teen mothers are at increased risk for further pregnancies, sexual abuse, mental health issues and dropping out of school (McCoy, 2015). Additionally, Cardinal Academy will adhere to the guidelines of the McKinney-Vento Act.

Multidisciplinary Team

There will be a weekly MDT meeting including the ~~Lead teacher, Cardinal staff Executive Director, and the wrap-around~~ social worker from the Salvation Army to discuss and troubleshoot any needs all students have that are a barrier to their academic success. ~~Director of Academics, academic/career counselor, school nurse, school social worker, and The Salvation Army social worker, to discuss student concerns, needs, and solutions.~~

Professional Development Plan

Cardinal Academy staff share the common mission of serving the whole student. By providing high-quality professional development and time for the Professional Learning Community (PLC), teachers will be better able to help all Cardinal Academy students to reach their potential. PLC sets a school-wide tone for growth by improving the skills and knowledge of its educators. PLC time will be used to foster a positive school culture and community of leaders working to improve educational aspirations and achievement for their students.

Academic Professional Development

Like the students and their Individual Growth Plans (IGPs) for differentiated instruction, each teacher and faculty member will create an Individual Professional Growth Plan (IPGP) to guide their growth and development as an educator through the school year. This will be completed during the first month of school. The IPGP will outline how the teacher/staff member hopes to advance their practice with professional growth goals and a plan for meeting those goals. These goals will connect to the observation and evaluation cycle utilized based on the Danielson Framework as required by the Idaho SDE.

In addition to weekly Professional Learning Community (PLC) meetings, professional development will be held seven (7) times during the school year. ~~Professional development will initially be led by Cardinal Academy Executive Director and Director of Academics, who have master's level degrees in emotional/social well-being and curriculum and instruction respectively.~~ Master teachers who have knowledge and experience in a particular area will also

lead PD sessions. Prior to school opening fall of 2021, faculty and staff will attend 3-4 full days of professional development. This is in addition to the seven other scheduled sessions.

Cardinal Academy will use data to drive and inform instruction and assessments. Our professional development will include how teachers will utilize the Renaissance Star math and reading as well as classroom quizzes, summative assessments, writing assignments and other culminating projects and assignments to gather data to inform their instruction and differentiation. These types of assessments are frequent, correlated to classroom instructional objectives, and the results can be quickly analyzed and evaluated to immediately adjust and correct instruction. Teachers will understand that assessments and the data they reveal, are an essential part of instruction, relevant sources of information, and a powerful tool in student learning.

School Culture and Character Professional Development

From their years at Booth Marian Pritchett School, Cardinal Academy's founders know that a well-rounded education goes beyond any established curriculum. In order to ensure our students are prepared for parenthood and life while also being college and career ready, we have identified some skills-based learning objectives that will take place school-wide in all academic areas.

Cardinal Academy students will gain experience and work towards proficiency in public speaking and presenting, discussing, problem solving, teamwork, listening and critical thinking. All students will work to develop solid study skills including note taking, active reading for understanding, organizing, including scheduling of appointments, and vocabulary.

Cardinal Academy students will become familiar with and will be expected to be proficient in the Idaho State Workplace Skills for Career Readiness standards. All teachers, having participated in professional development on these standards, will integrate opportunities to practice these in the classroom setting. For example, Standard 1.1 is "*demonstrate personal qualities and people skills.*" Students can show proficiency in this standard by coming to school every day on time, being honest and reliable, dressing appropriately and using appropriate language, demonstrating conflict resolution skills and showing creativity and resourcefulness. From their years of experience at Booth Marian Pritchett School, the leaders of the school know that students will either rise or fall to the expectations which are set by those around them. By having high standards for behavior, students are shown that the staff members believe in them and know they are capable of reaching their goals, whatever they may be.

While the Resilience and Well-Being course will focus in large part on character development skills, there is also an opportunity school-wide for teachers to be trained in and share with students these character development related skills. Based on experience, the school founders know that pregnant and parenting students are some of the very most resilient young people in our community. Those who have the grit to stay in school can model a thing or two about what resilience in action really looks like. Teachers will be able to connect character development in their lessons in the same way they work hard to connect their content lessons to students in a relevant way.

It is important to develop common language around these crucial skills such as the development of resilience and grit, the ways mindfulness and meditation can be used for self-regulation, and our school-wide belief in growth mindset. Our staff follows Trauma Informed School practices and realizes that curriculum is but one part of a student's learning process. All staff must serve as role models who exhibit such traits as vulnerability and trustworthiness. Staff will have an understanding of the ways trauma impacts brain development and learning. They will be able to utilize this information for their teaching, but also talk with students about the ways we can work through difficulties.

Professional Development topics may include:

Instruction	<ul style="list-style-type: none"> ● Layered Curriculum - Cathie Nunley and Mastery ● How to use Star to monitor student growth and inform instruction and differentiation ● How to use classroom assessments to inform instruction and differentiation ● Learning Management Systems Google Classroom/Blended learning models and other ways to use technology effectively in the classroom ● Workforce Readiness Standards & Career Technical Education
Evaluation	<ul style="list-style-type: none"> ● Danielson Framework for teacher evaluations
Social-Emotional	<ul style="list-style-type: none"> ● Growth mindset - Carol Dweck ● Trauma informed school model ● Adverse Childhood Experiences (ACEs) ● Resiliency building ● Trauma and brain development ● Trauma Stewardship and self-care ● Self-regulation skills for student ● Restorative Justice practices
Special Programs	<ul style="list-style-type: none"> ● Working with students living in poverty ● Sheltered Instructional Observation Protocol (SIOP) and other strategies for working with English Learners ● Section 504 Accommodations ● Best practices for Special Education

	<ul style="list-style-type: none">• Best practices for Gifted and Talented
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Financial and Facilities Plan

Fiscal Philosophy and Spending Priorities

Cardinal Academy knows that proper financial stewardship is an essential element of a successful school. Proper financial stewardship begins with prudent and balanced multi-year financial plans, as presented in this petition. Proper financial stewardship at Cardinal Academy also includes skilled financial management and oversight. Because of the small size of our school, financial management will be outsourced to a high-quality, experienced school financial management firm.

During the start-up phase and during the first year of operation, Cardinal Academy has contracted to use Bluum for its financial management services at no cost to the school. The school and Bluum anticipate continuing this relationship thereafter.

Financial oversight will be conducted by the board, in particular by its Finance Committee and Treasurer, Catherine Olschanowsky. As part of her management of the Adapt Lab in the College of Engineering at Boise State University, Olschanowsky has contributed to projects with federal funding exceeding \$7 million. She directly manages nearly \$2 million from the National Science Foundation and National Institute of Health.

Cardinal Academy's philosophy on financial management is to maximize the expenditure of available resources on services and supports that benefit students while maintaining spending flexibility needed to manage unanticipated financial events. Our three-year financial plan is balanced and includes the following assumptions:

- An enrollment of 80 already-pregnant or parenting teens at the beginning of the 2021-22 school year. Eighty is 50% of the average number of teen pregnancies per year in Ada County. Plus, we will add an additional 36 newly-pregnant teens for a total of 120 students during the school year. Both figures are roughly half of each population in Ada County and represent a conservative expectation of enrollment.
- \$423,000 of grant funds through start-up, Year 1 to Year 4. Beginning in Year 2 and each year thereafter, end-of-year Net Income exceeds budgeted grant funds. Thus, even if the school did not receive the budgeted grant funds, it would still end the year with a positive balance. In Year 5, no grant funds are budgeted. (See Appendix A for 5 Year budget). The budgeted grant funds are anticipated from the federal Charter Schools Program and/or the J.A. and Kathryn Albertson Family Foundation and are in line with norms among new charter schools in Idaho. More than 70% of Idaho applicants for federal Charter Schools Program grants have been approved and the average grant amount has exceeded \$900,000. Cardinal Academy will be seeking less than half of the average amount. In addition, Cardinal Academy is being founded by two educators who are Bluum Fellows and the Albertson Family Foundation has routinely provided financial support to schools started by Bluum Fellows. In addition, the Albertson Family Foundation has a long-standing partnership with The Salvation Army and was a major contributor to the

construction of the facility that will house Cardinal Academy. All of these facts indicate the school's projected fundraising income is likely and reasonable.

- While we are confident in our enrollment projections, multiple income and expense items that can be managed differently if enrollment or grant funds do not meet expectations. These tactics could also be used in the event that there is not a 3% yearly budget increase., for example:
 - If enrollment is lower than expected, the school can increase outreach to male parenting teens and to pregnant and parenting teens in Canyon County (which has slightly higher teen pregnancy numbers than Ada County);
 - The budget assumes an attendance rate of 75 percent, which is likely to be higher;
 - The budget assumes a full-time school counselor, which could be switched to part-time if enrollment is lower than projected;
 - The budget Medicaid reimbursement for eligible services provided by the school could be higher;
 - Limit salary increases, which are currently budgeted at 3% increases per year, including across the teacher salary ladder;
 - Fundraising (the school has established significant community support); and,
 - After Year 1, the school is building reserves that could ultimately be leveraged.

Transportation and Food Service Plans

Because Cardinal Academy will be serving students from throughout Ada County, transportation will be essential. The Salvation Army has proposed to operate transportation services for Cardinal Academy students, using pass-through funding from the state. Cardinal Academy is interested in this offer, both directly because of the service The Salvation Army could provide, but also because of the opportunity to strengthen the school's partnership with The Salvation Army. While the school and The Salvation Army have not executed a contract regarding transportation services and are not bound to do so, the budget submitted with this petition reflects a plan that the parties will do so.

Whether or not transportation is provided by The Salvation Army, Cardinal Academy will follow all state reporting requirements for transportation. A formal bid process as outlined by the Idaho State Department of Education and Idaho Code will be followed. Transportation will be provided to the student population as outlined in Idaho Code. These funds are reflected in the budget provided with this petition.

Students with special needs will be provided transportation in accordance with the requirements of state and federal law. A student's IEP will determine if transportation is required and the best method of transportation.

Proper nutrition is important for all students, especially pregnant and parenting teens and Cardinal Academy will ensure all students receive healthy meals. The Salvation Army has proposed to operate a food service program at the school at no charge to students. As it does in locations throughout the country, The Salvation Army proposes to directly administer this program. Because The Salvation Army plans to directly administer food service, including seeking government reimbursements, these are pass-through funds in the Cardinal Academy

school budget. While the school and The Salvation Army have not executed a contract regarding food services and are not bound to do so, the budget submitted with this petition reflects a plan that the parties will do so.

Financial Management and Monitoring Plan

Cardinal Academy ~~will contract with Elevate Academy Foundation~~ ~~has contracted with Bluum,~~ an experienced provider of charter school financial management and back office services, for financial management and back office services.

The ~~lead teacher administrator~~ or their delegate will have the authority to initiate purchase requests. Our outside financial manager will work with the administrator to review purchase requests and submitted invoices and determine the proper account coding for the purchase. The financial manager and ~~lead teacher Executive Director~~ will also track the expenses and keep a ledger using 2M software of current expenses compared to budgeted expenses, reporting to the board at least monthly. ~~Blank checks will be stored at the outside financial manager's office in a locked cabinet.~~ Payment of expenses will be made by check. The checks will be printed by the financial manager and sent to the ~~lead teacher administrator~~ for review and signature. Authorized signatories will be the ~~lead teacher administrator~~, the board chair, and the board treasurer.

Our outside financial manager will also offer guidance in developing an accurate estimate of the school's budget based on school funding formulas. The ~~board of directors in conjunction with the Elevate Academy CFO Executive Director~~ will develop a budget in accordance with the requirements and timelines set forth by the State Department of Education (SDE).

Cardinal Academy will maintain all financial records in accordance with Generally Accepted Accounting Principles (GAAP) and will follow all requirements set forth by the Idaho State Department of Education.

The Board of Directors will hold the responsibility for the financial oversight of Cardinal Academy. The board's responsibilities will include:

- With input from the ~~CFO Executive Director~~ develop and monitor the annual operating budget, develop a long-term financial plan;
- A quarterly review of the budget-to-actual expenditures and income, and make adjustments as necessary;
- A quarterly review of cash-flow;
- Development of financial policies that follow the requirements of state and federal laws and Generally Accepted Accounting Principles to provide for financial controls;
- Review of the general ledger to verify compliance with policies;
- Meeting with the bookkeeping/accounting personnel or professionals to monitor financial viability; and,
- Conducting an annual audit of the financial statements through the use of a qualified audit firm.

Payroll

Subject to the approval of the Board of Directors and the policies and procedures established by the board, Cardinal Academy's Executive Director will contract ~~for back office support with a private company~~ for the purposes of outsourcing the processing of payroll.

Purchasing

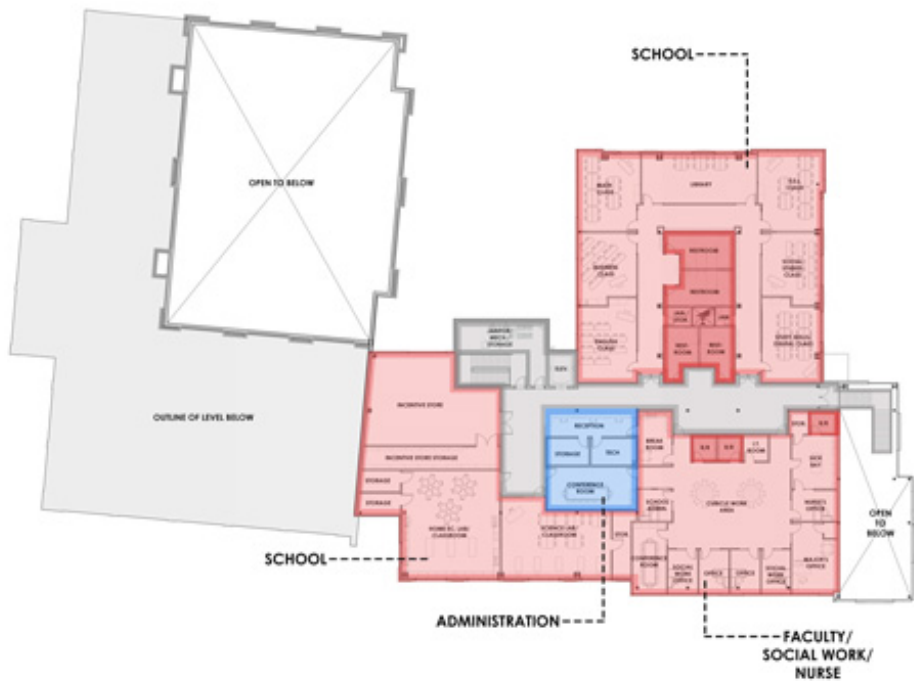
Subject to the approval of the Board of Directors and the policies and procedures established by the board, the ~~Executive Director or lead teacher~~ will develop the procedures for procuring goods and services for Cardinal Academy. All purchasing procedures will comply with Idaho laws and administrative rules, including competitive bidding.

Facilities Plan

Cardinal Academy will be located in a state of the art facility that was completed in 2019 for the purpose of serving a school for pregnant and parenting students. This facility was part of a capital campaign carried out by The Salvation Army to raise over \$9 million dollars of philanthropic support to help build the new Booth School Program which was presented to those donors as a joint effort between The Salvation Army and a quality educational program (then BSD - now Cardinal Academy). The community values and supports this program and they were willing to put millions of dollars behind it. Please refer to Appendix F10 for a list of major donors. This facility will be leased from The Salvation Army, Boise Corps. The location of the school at 9492 W. Emerald St. in Boise, Idaho, was carefully selected in order to maximize access to Cardinal Academy's target demographic. The location in West Boise allows students in Boise City proper, students in Kuna, Meridian, Eagle, Star, and even Canyon County, to easily access the school. In addition to the bussing arranged by the school, city busses can be utilized as Cardinal Academy is located along a major city bus line.

The facility provides eight ample classrooms, including a science and home economics classroom/lab. There is office space for administrative staff, the school nurse as well as the services provided on site, such as: mental health counseling, appointments with the Special Supplemental Nutrition Program for Women, Infants and Children (WIC), medical appointments with Family Medical Residency of Idaho (FMRI), Vocational Rehabilitation, and others. Students will have access to a library, a school store, the sick bay, gymnasium, and cafeteria. The commercial kitchen can be used for culinary education. The on-site childcare center provides free, high quality childcare for Cardinal Academy students. On-site, dependable, high quality, childcare is crucial for young parents seeking to further their education.

The school is primarily located on the second floor (Fig. 1). The gym, child care center, and cafeteria are located on the first floor (Fig. 2).



SECOND FLOOR PLAN



Figure 1



Figure 2



Street view of school from Emerald

Cardinal Academy and The Salvation Army have agreed to all material terms to a lease, including the annual lease amount and the use of spaces within the building. A detailed lease is currently being negotiated. The Salvation Army has agreed to lease the facility to Cardinal Academy for an amount equal to the state charter school facility funding rate, projected to be \$49,980 in Year One. Once Cardinal Academy is eligible for Lottery funds, starting in year 2, the lease amount will increase to include this distribution.

The facility meets state and federal health and safety laws and Americans with Disabilities Act (ADA) requirements. The school will comply with state laws to have annual safety inspections of the facilities and will address any issues that are found during those inspections.

The school will remain in compliance with applicable state and federal guidelines as provided in Section 39-4130, Idaho Code, and the ADA and will provide certification that the facilities meet all requirements for health, safety, fire and accessibility for those with disabilities.

Board Capacity and Governance Structure

Strong governance is the foundation for a strong organization and a strong school. For this reason, Cardinal Academy has established an exceptional Board of Directors who collectively possess a depth and breadth of skills and experiences that will enable the school to be successful.

Cardinal Academy is incorporated as a nonprofit corporation in the State of Idaho and has adopted bylaws that have been reviewed by counsel and determined to be legally compliant and to address all necessary content.

The Board of Directors understands and values the difference between governance and management. Accordingly, the board will perform the proper functions of governance and will:

- Maintain Cardinal Academy's vision and mission;
- Establish academic, operational, and financial goals;
- Adopt policies;
- Ensure the financial viability of the school;
- Hire, evaluate, and determine the compensation of the school leader; and,
- Comply with all applicable laws, including but not limited to laws on public information and open meetings.

Cardinal Academy management will be responsible for implementing operating practices to support the school's vision and mission, achieve the organization's goals, implement board policies, maintain the financial viability of the school, hire and manage all other staff, and comply with all applicable laws. The board will monitor and evaluate how well management is implementing and achieving board policies, goals, and objectives.

Governance Structure

Cardinal Academy's bylaws provide for a Board of Directors comprising no less than five and no more than 15 members. The founding Directors are Hannah Gayle, Jason Hudson, Patricia Kempthorne, Emily McClure, Cathie Olschanowsky, and Greg Richmond. Each founding Director's qualifications are described in the board Member Qualifications section that follows.

Board members serve staggered, three-year terms, with a limit of two terms. Initial board members are those named in the incorporating documents. Thereafter, board members will be selected by the board pursuant to a policy developed by the board. The board will meet at least 4 times a year, including 1 annual meeting and three or more regular meetings, but may choose to meet more frequently.

Board officers are a Chair, Vice-Chair, Secretary, and Treasurer.

The Chair presides at all meetings of the Board of Directors and is an ex officio member of all committees. The Chair oversees implementation of board and organizational policies and ensures that appropriate administrative practices are established and maintained.

The Vice Chair discharges the duties of the Chair in the Chair's absence and shares other responsibilities as appropriate.

The Secretary provides direction for the keeping of legal documents including minutes of all meetings of the board.

The Treasurer provides direction for the financial management of the organization and helps the board to meet its financial oversight responsibilities.

Cardinal Academy's Board of Directors has the following committees:

- **Governance.** Key responsibilities include ensuring all trustees understand their roles and responsibilities, board member recruitment and selection, annually evaluating the full board, individual trustees, and the school leader.
- **Finance.** Key responsibilities include conducting proper oversight of the financial health of the organization and ensuring compliance with all applicable laws.
- **Academic Excellence.** Key responsibilities include ensuring that the full board and the school leader have a shared vision of academic excellence and a clear plan to achieve it, and conducting oversight of that plan.

Cardinal Academy's bylaws allow for the board to add or modify its committee structure through board policy.

Board Member Qualifications

Cardinal Academy's board reflects diverse experiences and skills needed to support the success of the school. In building the composition of the board, Cardinal Academy has considered and will continue to look for Directors with skills and experience in six areas: education, social service, finance, law, post-secondary preparedness, and teen pregnancy and parenting. In addition, Cardinal Academy is working to build a board that reflects the diversity of race, ethnicity, and genders of the community served by the school.

The following presents a brief description of each current Director and her/his qualifications.

Hannah Gayle

Graduate of Booth Marian Pritchett School, Current Boise State University student, and Mentor, Boise State University Young Parent Mentor Program

Hannah Gayle is a Behavioral Interventionist that is skilled in mental health, special education and de-escalation techniques. She currently works for a charter school that equips engineers (students) with the knowledge, skills, and character to succeed in college and the future world. She has developed a peer and faculty mentor program for teen mothers that are pursuing their undergraduate degree and is currently working on finishing her nonprofit management certification. A willingness to adapt and hard work ethic are what set her on a path for achieving her professional goals. She is completing her Bachelor's in Multidisciplinary Studies with a minor in Economics and a Nonprofit Management from the College of Business and Economics.

The bulk of Hannah Gayle's career has been in healthcare working as a Certified Nursing Assistant for Idaho's largest nonprofit hospital St. Luke's. In the Clinical Support Unit, she gained a variety of skills that spanned over three hospitals and many departments including Behavioral Health, Neurology, Oncology and Wound Care. Outside of her career, she has volunteered her time as an [advocate for Education in the Idaho Capitol](#). She has a great amount of experience in public relations, professional writing and communication and problem solving.

Jason Hudson (Board Treasurer~~Secretary~~)

Director of Government Affairs, Idaho AFL-CIO

Jason Hudson is the Government Affairs Director of the Idaho AFL-CIO, serving as the full-time lobbyist to the Idaho Legislature, as well as the lobbyist to Idaho's federal delegation to the US Congress. He works with the Idaho Governor's office and state administrative agencies on policy matters related to worker rights, worker safety, and building good jobs in Idaho. He educates members and affiliates about participation in government and the political process, and develops and implements electoral programs to support pro-worker candidates for public office.

As the Director of the Idaho Worker's Opportunity Network, he served as the state's Labor Liaison, coordinating activities and communication between the Department of Labor and the local unions across the state affiliated with the Idaho State AFL-CIO. He worked with the Idaho Workforce Development Council and the Idaho Division of Professional-Technical Education to help develop state policies to promote and support a well-educated and well-trained workforce. He served as the chief proponent of JATC Apprenticeship programs in the state, working with the training directors of the 26 apprenticeship training centers that serve Idaho to improve their reach and recruit people to train for high skill careers in the construction crafts. He worked with students in our schools and with adults interested in apprenticeship training to help them understand the options available to them and to provide support through the application process.

Patricia Kempthorne (Board Chair)

Patricia Kempthorne has dedicated her work life and her life's work to building a family-consciousness in her family, workplace, and community. After graduating with a degree in business management from the University of Idaho she chose to build her career in the non-profit sector and community service. In 2014 she was awarded an honorary doctorate in Administrative Policy from the University of Idaho.

A champion for families and children, she was able to shine a spotlight on the issues closest to her while serving as Idaho's first lady from 1999 to 2006. Mrs. Kempthorne volunteered her time to ensure that Idaho continues to be the best place to raise a family. In 2005, she created the Twiga Foundation, Inc. – a non-profit dedicated to continuing that work in organizations through educating them about work-life fit, flexibility, and effectiveness for working parents. Today, the Twiga Foundation focuses on parent engagement and early learning opportunities. In 2009, through a partnership with the University of Idaho, Twiga became the exclusive licensor of BLOCK Fest®. BLOCK Fest® raises awareness of early math and science learning

opportunities by offering hands-on block play experiences to families of young children thus helping to develop the workforce of the future.

A leading advocate for women, families, and children, Mrs. Kempthorne serves as the Chair of the Parents as Teachers National Board of Directors, the St. Luke's Children's Hospital Advisory Board and Executive Committee, and the Idaho Food Bank Capital Campaign. In 2016 she was honored by the American Mothers, Inc. as a National Mother of Achievement.

Mrs. Kempthorne and her husband, Dirk, were married in 1977, have two grown children and five grandchildren.

Emily McClure (Board Vice-Chair)

McClure Policy LLC

Emily McClure is a Boise lawyer, lobbyist and mom to three children. Her practice, McClure Policy LLC, focuses primarily on government affairs in the fields of education, health care and natural resources both in Idaho and across the West. An advocate for children, she has contributed on behalf of a variety of clients to numerous statutes and regulations aimed at benefiting Idaho's kids, and has worked closely with her clients to improve the legislative climate for charter schools, innovative educators and students. Before starting her own firm, Emily practiced litigation at Givens Pursley in Boise, held a Ninth Circuit clerkship, and dabbled in international law at a United Nations Tribunal. Prior to attending Boston College Law School, Emily worked in Washington D.C. for Senator Mike Crapo where, among other things, she handled education and labor policy.

Catherine Olschanowsky (Board ~~Secretary-Treasurer~~)

Ph.D., Assistant Professor, Computer Science, Boise State University

Dr. Olschanowsky became involved in the education of at-risk youth through her involvement in diversity and inclusion efforts for computer science. She designed and implemented a service learning course to expose, recruit, and engage students from historically excluded backgrounds to computer science. During this course university students develop lesson plans and engage high school students in problem solving using computer science. This class has been successfully implemented as a collaboration with the Booth Marian Pritchett School.

Dr. Olschanowsky's primary research interests include high performance scientific computing, in other words, using supercomputers to solve scientific and engineering problems. She teaches a range of courses at Boise State University and has experience teaching high school students computer science basic through project-based learning.

~~Greg Richmond~~

~~Greg Richmond founded the National Association of Charter School Authorizers and served as its CEO from 2005 through 2019. He serves or has served on the boards of the Perspectives Charter School, St. Walter Parish elementary school, and Mother McAuley high school. He has~~

~~served as a consultant to the Colorado League of Charter Schools, Missouri Public Charter Schools Association, Texas Association of Charter Schools, and the national Coalition of Public Independent Charter Schools. He was a founding board member of the National Alliance for Public Charter Schools and was inducted into the National Charter School Hall of Fame in 2017. Currently, he serves as a Strategic Advisor to Bluum.~~

Brady Watkins

Brady is a CPA for an accounting firm in the Treasure Valley. His work includes tax, audit, and other various business advisory services. In addition to his work in public accounting Brady is an adjunct instructor for Eastern Oregon University. Brady volunteers his time with a number of nonprofits that include, Finance and Family Strengthening committee member for Family Advocates, treasurer at his church, president and treasurer of HOAs in communities where he owns rental properties, and Paint the Town/Rake Up Boise committee member for NeighborWorks Boise. Brady received a Bachelors of Business Administration, Accountancy from Eastern Oregon University and a Masters of Accountancy from Boise State University.

Pragnyaa Chakravarthy

Pragnyaa is an Educational Specialist focused on Math intervention with a passion to help children and young adults discover their learning processes. She has more than 8 years of experience at a leading Boise non-profit that is committed to finding a pathway for learning for every individual. She strongly believes that every learner has unique strengths that can be leveraged to meet their needs; make learning a fun, enjoyable experience with focus on self-regulated learning rather than just academic learning. Driven by both passion and fascination for the human brain, she designed and implemented evidence-based math framework, and curriculum guides that allow students with diverse strengths and needs to enjoy and learn Math. Prior to her career in education, she spent many years as an IT project Manager in various settings. She lives in Boise, Idaho with her family and loves yoga, board games, and being outdoors!

Transition Plan

Cardinal Academy’s board has been established from the beginning to provide a solid foundation, continuity, and stability for the school now and for years to come. There will not be a “founding board” that transitions to a “governing board.” There is a single, continuous board. The board held its first meeting on August 12, 2020, at which it adopted bylaws and elected officers. It has scheduled regular meetings on the first Wednesday of each month through June, 2021.

To provide continuity, individual terms are staggered from the start. One group of Directors will initially serve a one-year term with the option of being re-elected to a three-year term in Spring 2021. A second group of Directors will initially serve a two-year term, with the option of being re-elected to a three-year term in Spring 2022. A third group of Directors will initially serve a three-year term, with the option of being re-elected to a three-year term in Spring 2023. Current board members will be assigned to terms at the September, 2020 board meeting.

This approach allows for the consistent stewardship of the school’s mission and vision for years to come.

None of the founding members of the board intends to resign in order to apply for a paid position at the school. Consequently, there is no risk to the board or the school of founder’s syndrome derailing the governance of the school.

Board Member Recruitment and Training

Cardinal Academy has identified a set of board member qualities, skills, and experience that will enable the school to thrive for years to come, and has been using those attributes to identify, recruit, and select board members. The goal of the board is to have each attribute filled by at least one board member, and preferably more than one. The list of qualities, skills, and experiences that Cardinal Academy is using to recruit and select board members includes:

1. Gender,
2. Race and ethnicity,
3. Education experience,
4. Social service experience,
5. Finance expertise,
6. Legal expertise,
7. Post-secondary pathways, and
8. Experience with pregnant and parenting teens.

This list of attributes will be used to identify, recruit, and select future board members as well. Board member recruitment will be the responsibility of the Governance Committee.

Cardinal Academy has relationships with two organizations to provide for ongoing training of board members: the Idaho School Boards Association and BoardOnTrack. The expertise of these

two organizations is complementary: ISBA has expertise in Idaho school law, policies, and requirements; BoardOnTrack is a national organization with years of experience training and supporting charter school boards.

The Cardinal Academy Board of Directors will use the Idaho School Board Association's "School Board Professional Services," including its Professional Development Modules and its many resources in its New Board Member Packet: Code of Ethics, Basics of Governance, Boardsmanship 101, 8 Characteristics of an Effective Board Member, and more. The New Board Member Packet will serve as the foundation for on-boarding new board members. New board members will also meet with appropriate school staff to learn the history, educational program, finances, and legal obligations of Cardinal Academy.

The Board of Directors is using BoardOnTrack's on-demand online courses, including "What's Your Board's Role in Academic Excellence," "Board Governance 101," "Assess Your Board to Reach a Higher Bar," and more. The information learned from all of the above, especially the results of the "Assess Your Board" course, are being used by the board to develop full board and individualized training programs, both during the initial founding stage of the board and for its on-going self-assessment and improvement. The on-going self-assessments will include opportunities for the school leader, school staff, and school community to provide feedback to the board on the strengths and weaknesses of the school and the board.

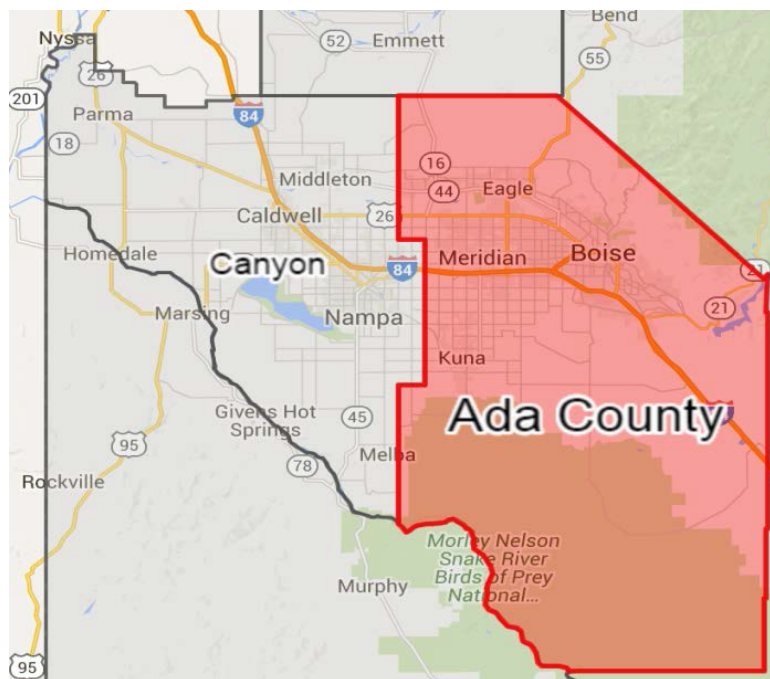
Student Demand and Primary Attendance Area

Primary Attendance Area

Our primary attendance area is Ada County, including Boise, Garden City, Meridian, Eagle, Star and Kuna. Included in this county boundary are the school districts of Boise City, West Ada and Kuna. The population of Ada County continues to grow. According to www.census.gov, there was more than 20 percent population growth recorded between 2010 and 2019. Ada County's residents identify as 91.9 percent white, 1.4 percent Black or African American, .8 percent American Indian or Alaskan Native, 2.7 percent Asian, .2 percent Native Hawaiian or other Pacific Islander, 8.5 percent Hispanic or Latinx and 3.0 percent two or more races. The median household income for 2014-2018 was \$63,137, with close to 10 percent of residents living in poverty.

There are 11 traditional high schools and 6 alternative high schools within Ada County, covering the three separate school districts. Only one of them currently provides on-site childcare for parenting students. The provision of childcare is the strongest predictor of school retention (Assini-Meytin et al, 2018). Since the closure of the Booth Marian Pritchett School in spring of 2020, there is no existing designated pregnant and parenting program in the state of Idaho.

The founders of Cardinal Academy know, based on both quantifiable and anecdotal data, that most pregnant and parenting students are in a different subset of at-risk alternative students than those attending traditional alternative high schools. There are similarities, but the glaring difference is pregnancy and parenting which call for a much different set of interventions. A well thought out, comprehensive approach, addressing the specific needs of pregnant and parenting students can ensure their success.



Student Demand

The chart below shows births to mothers 19 or younger in Ada County between 2016 and 2018, according to the CDC WONDER database. During this same time period (2016-2018), there were an additional 324 women between the ages of 20 and 24 who gave birth in Ada County and did not have a high school diploma. This is relevant because Cardinal Academy can serve students up to age 21, allowing previous dropouts to return and finish their high school diploma. Despite birth rates for teens in the U.S. decreasing over the last 20 years, the United States continues to have the highest teen birth rate among developed countries (Kearney and Levine, 2012). Canyon County had a similar birth rate to Ada County during these years. If there is space, pregnant and parenting students from Canyon County and other counties may open enroll in Cardinal Academy, though transportation will not be provided to open enrolled students. We will serve up to 140 pregnant and parenting students each year, with 120 students being optimal enrollment.

According to the CDC WONDER database and Idaho Vital Statistics (Please see Appendix F9, Fig. 2, pg 190 for data verification):

Year	Ada County - Births to mothers 19 or younger
2018	159
2017	173
2016	164

Teen births have decreased significantly in Idaho since the 1990's. And yet, there are still a significant number of young women giving birth each year. As the teen pregnancy rate for Idaho has dropped, the population of Idaho, including Ada County, has continued to grow. Please see Appendix 9, Figs. 3 & 4, pgs 191-102 for more information.

Slightly more than one half of young mothers received a high school diploma by the age of 22, compared with 89 percent of women who had not had a child during their teen years (HHS). This continues to be true according to a 2018 report from Child Trends. Half of all female dropouts and one-third of male dropouts said becoming a parent played a role in their decision to leave school (HHS). Designated pregnant and parenting charter school programs such as New Legacy

Charter in Aurora, CO and NET Charter High School in New Orleans, LA show a more than 50 percent increase in their graduation rate (75 percent and 88 percent, respectively, according to their websites). This growth is attributed to the wraparound services these programs provide, such as smaller class size, on-site childcare, and a flexible learning model.

- According to the ACLU, illegal discrimination is a major contributing factor to this high dropout rate among parenting teens (ACLU, 2020). Many schools enact policies that punish rather than support pregnant and parenting teens, despite the Title IV protections.
- Adolescent mothers are more likely to be poor and disproportionately African American and Latinx, live in low-income communities, be born to parents with low educational and employment attainment, have a history of child abuse, reside in chaotic home environments and have limited social support networks (Hodgkinson et al, 2014).
- Parenting teens without financial support from parents are at greater risk of falling behind in their education (Assini-Meytin et al, 2018).
- It is important to include the father in programming, as appropriate and as long as it is a healthy relationship with the mother and child(ren). (HHS).
- There is a link between teen pregnancy and early trauma. Adverse childhood experiences are associated with changes in brain structure which lead to long-term health and social consequences, including adolescent pregnancy (Hawkins & Guinasso, 2014).
- Adolescent mothers experience significantly higher rates of depression, are at elevated risk for suicidal ideation, and almost half of adolescent parents in one study met the full criteria for posttraumatic stress disorder (Hodgkinson, 2014).
- Adolescent parents face significant barriers to accessing mental health services and may be more likely to engage in treatment when appointments are flexible and school-based (Hodgkinson, 2014).
- Small, designated pregnant and parenting programs allow students to avoid the stigma attached to young parents in our society. These students are primarily female, low income, and in large part ethnic minority students. Both popular and policy discourse, tend to question pregnant and parenting girls' intellect and character, while commonly viewing them as "undeserving" and whose poor choices and character caused their predicaments (Kelly, 2000; Pillow, 2004; Wilson et al 2019). (Click here for link to access Salvation Army marketing video from 2017).
- Research shows that 25 percent of teen dads want to be an active part of their child's life, but financial restraints, the relationship with the baby's mother and lack of parenting skills are barriers that make this difficult (The Fatherhood Project, 2016). Cardinal Academy is a school that welcomes and encourages the participation of teen fathers and will help them address some of the barriers to fatherhood, as well as provide them with a well-rounded education that will prepare them for college or career.

- Nationally, if not internationally, there is a glaring gap in services available to teen dads. Not all teen parent relationships are healthy, and Cardinal Academy provides the services necessary to single parents to help navigate these difficulties. However, when a co-parenting agreement can be reached, there are great benefits to the child(ren). These young men became involved fathers who were better able to support their children both financially and emotionally upon the completion of the program.

Cardinal Academy will be the only school in Idaho that addresses and redresses these barriers and issues.

- Continuity of enrollment is especially important for at-risk students. Cardinal Academy is specially equipped to work with students to overcome barriers that interfere with their educational planning. In addition to pregnancy and parenting, Cardinal Academy social workers and counselors will assist students with homelessness, financial difficulties, family problems, mental health issues and other life circumstances that can interfere with education attainment.
- Year round school gives students the opportunity to access the services they need when many schools are out for the summer. Student needs and the needs of their families are not put on hold for summer vacation. Further, students are able to either catch up when they are deficient in credits, stay on target taking into account maternity leave, or get ahead to ensure an early graduation.
- When provided with strong social and functional supports, the majority of teen mothers and their children can have positive outcomes equal to those of their peers who bear children later (Hodgkinson et al, 2014).
- Applied practical skills and basic skills related to problem solving, critical thinking and lifelong learning are crucial in the changing workforce of Idaho (Winters, 2020). These skills can add value to a high school diploma for students who are unable to go onto higher education directly from high school and choose to directly enter the workforce.
- Each level of educational attainment, starting with a high school diploma, reduces the amount of public assistance received by a parent and her/his dependents.
- Of the eight non-graduates who finished the 2019-2020 school year at Booth Marian Pritchett, four are attending Frank Church High School. Two of the remaining students left Boise and two are attending the Booth Young Parent Program at the Salvation Army while attending ICON. Frank Church High School does not have any information on their website about services for pregnant and parenting students as of early October.

Student Population

A student may become pregnant at any time during middle school or high school or may become pregnant after dropping out. Some pregnant and parenting students are on-track for a four year high school graduation and fit neatly into grade levels. However, many pregnant and parenting

students are credit deficient, ranging from 1-2 credits behind to several years behind. Enrollment projections by grade level are difficult, if not impossible to ascertain.

It is crucial that Cardinal Academy be able to meet students where they are, literally, both in regard to life-timing and academic planning. When a student comes to register at a designated pregnant and parenting program, she or he is frequently in crisis. Life has been turned upside down. Cardinal Academy is a safe place to land; a place free of stigma and rejection. It is essential we not turn the student away due to inflexible calendars.

No matter the student's academic credit standing, we will meet with her/him to create a clear plan for success. Cardinal Academy will operate with block scheduling which allows for more credits to be earned throughout the school year (16 vs 12-14) and students will have the opportunity to earn additional credits over the summer, as well as trying out internships, job shadows, work experiences or other unique training opportunities. This will be a unique plan, based on the student's previous schooling, Star test measurements in Math and English, and post-secondary goals.

A date will be set for the weighted enrollment lottery. If the school is not at maximum enrollment, an admissions lottery will be held in accordance with Idaho Code.

Any student who is pregnant or parenting, qualifies as "at-risk" according to Idaho Code.

Enrollment Capacity

Centers for Disease Control WONDER data shows that an average of 80 mothers, age 19 or younger, **without a high school diploma**, give birth in Ada County each year. Additionally, there are eligible mothers ages 20-21, but the data does not delineate these exact numbers. Idaho Vital Statistics states that between the years 2016-2018, there were 2,322 births in Ada County to 20-24 year olds and more than 300 of those births were to mothers without a high school diploma.

For the 2021-22 school year, Cardinal Academy will market itself to teen mothers and fathers who have given birth during the prior two years and will plan to begin the school year with 80 such students (representing a 50 percent enrollment rate for the 160 mothers who gave birth during those two years).

During the 2021-22 school year, Cardinal Academy will continually market itself to new teen mothers and fathers who give birth during the school year, with a goal of enrolling 60 new mothers and fathers by January 1.

At that time, there will be 140 students enrolled at Cardinal Academy and the school will be at full enrollment for that school year. For funding purposes, because the 60 additional students will not be enrolled at the school for the full school year, we anticipate that state funding for them

will be prorated and we estimate that those 140 students will generate funds equal to 119 or 120 full-time equivalent students.

Pregnant and parenting teens who approach Cardinal Academy after it reaches full enrollment will be provided a wide array of support services, coordinated by The Salvation Army, and will be encouraged to apply to enroll the following school year.

Approximately 40 percent of the student body is expected to be in its senior year and will graduate at the end of the year. Approximately 60 percent of students, or 84 students, will not be completing their diploma at that time.

Of those 84 students, Cardinal Academy expects that 90 percent of them (76 students) will continue to be enrolled for the 2022-23 school year. An additional eight students are expected to enroll during the summer, bringing the total enrollment on the first day of the school year to 84.

During the second year and each successive year, the projections regarding the number of new parents enrolling during the year are the same as the first: 60 new parents will enroll in the school by January 1.

During the second year and each successive year, the projection regarding graduating, continuing students, and new student enrolling for the following year are the same, producing an enrollment of 81 students on the first day of each school year. As Cardinal Academy becomes well-known in the community these conservative numbers for enrollment will likely increase.

Avg. annual # of teen new mothers in Ada County w/o a HS diploma	80
Avg. # of teen already parenting mothers in Ada County	160
New parent recruitment rate	75%
Parenting mothers recruitment rate	50%
New mother partial year adjustment rate	75%

	Y1	Y2	Y3	Y4	Y5
FTE					

New mothers	40	44	44	44	44
Parenting/continuing mothers	80	76	76	76	76
Total FTE	120	120	120	120	120
Headcount					
New parents	60	64	64	64	64
Parenting/continuing mothers	80	76	76	76	76
Total headcount	140	140	140	140	140
Headcount after graduation (60%)	84	84	85	85	85
Retention rate	90%				

Enrollment Projections by Grade Level

	2021-2022	2022-2023	2023-2024	2024-2025	2025-2026
9	12	12	12	12	12
10	25	24	24	24	24
11	38	36	36	36	36
12	45	48	48	48	48
TOTAL	120	120	120	120	120

Cardinal Academy's optimal enrollment will be 120 students, not to exceed 140.

On-Going Marketing Plan

Pregnant and parenting students in our impact area live throughout Ada County. Therefore, to create awareness of Cardinal Academy, the student recruitment plan must be a consistent, well-timed, well-targeted, public relations and advertising campaign, with an annual budgetary line-item. Cardinal Academy will initiate the student recruitment plan beginning with the development of marketing materials the first week in January. Cardinal Academy's leadership team and Board of Directors will lead the marketing efforts with an Executive Assistant who will coordinate student recruitment activities.

First, a website will be designed and launched and social media accounts will be developed. ***Second***, an electronic, shareable brochure with links to the school website will be created and emailed to medical clinics, physicians, Terry Reilly Health Services, Stanton Healthcare clinic, Planned Parenthood Health Center and mental health clinics in the area. ***Third***, a press conference inviting the local media will be held at the campus to announce the opening of Cardinal Academy. ***And fourth***, a promotion plan of **regularly distributed** press releases and public service announcements to be sent to the local media, and updates will be posted on our website and social media.

Market research of this student population has been commissioned by Cardinal Academy's collaborating partner, The Salvation Army, and paid for with grant funds. The market research is currently being conducted by Drake Cooper Advertising, Marketing & Digital Agency of Boise and Cardinal Academy will use the data to give direction to and increase marketing effectiveness of our student recruitment plan. Using the results, advertising will begin in February, driving potential students and their parents to the website encouraging them to enroll. Student recruitment will continue at various levels of frequency and market saturation each month according to the plan. Additionally, Cardinal Academy will develop easy, student-friendly, enrollment procedures on our website, and implement a plan for **constant contact** with students from enrollment to the start of school.

* One significant difference between Cardinal Academy and Booth Marian Pritchett School will be our commitment to fund and develop an on-going, year-round, student recruitment plan. Student recruitment at BMPS was not prioritized by the Boise School District after 2013; therefore, numbers dwindled.

Community Partnerships and Local Support

Cardinal Academy's strongest and most important partnership is with The Salvation Army, Boise Corps. The Salvation Army has been providing services to young parents in the Boise area for more than 100 years. They will provide our program with the facility, additional social work services, manage the on-site childcare, provide financial assistance for childcare, contract with the school for transportation and work with us to provide nutritious and delicious meals to our students.

Furthermore, Cardinal Academy is strengthened exponentially by our other community partnerships. Cardinal Academy has the great privilege of serving the underserved and will

continue to help ensure our students are connected to not only the services for which they are eligible, but connect them to any and all services that can help them to find success.

Cardinal Academy partners with:

- The **Special Supplemental Nutrition Program for Women, Infants and Children (WIC)** to provide on-site access in order to ensure students are utilizing this important program while not having to miss school to attend regular appointments. WIC provides nutritious foods, information on healthy eating and referrals to health care for pregnant women and their infants and children up to age 5.
- **Family Medicine Residency of Idaho** to provide on-site, quality and affordable health care to young parents and their children. They also provide the school with referrals.
- **St. Luke's Regional Medical Center and St. Alphonsus Regional Medical Center** baccalaureate level nurses contribute to the pregnancy and parenting Resilience and Well-Being courses throughout the school year. St. Luke's nurses also teach on-campus child car seat safety classes as well as providing a car seat for students.
- The **Idaho Department of Labor** to connect eligible graduates with case management services, internships, workforce training and assistance with higher education through the Workforce Innovation and Opportunity Act (WIOA).
- **Vocational Rehabilitation** to provide pre-employment transition services to students with disabilities through job exploration counseling, work based learning opportunities, workplace readiness training, and instruction in self-advocacy.
- **TRiO Educational Opportunity Center** to help low-income, first generation and disabled students gain access to post-secondary education by providing free college advising and financial aid support. TRiO comes to campus to help students complete the FAFSA and are all eligible to take advantage of TRiO services following graduation.
- The **Idaho Workers Opportunity Network (I-WON)** to connect students interested in learning a trade with apprenticeships so they can enter a high demand career directly following completion of high school.
- **College of Western Idaho** to assist our students with applications, financial aid, and course selection on our campus. Further, we collaborate with CWI to ensure our graduates are connected to programs that will help to increase their success in higher education such as support groups and other special programs aimed at increasing student retention.
- Dr. Catherine Olschanowsky of **Boise State University** will provide Cardinal Academy students with an opportunity to learn computer programming and will be collaborating

with our math and science departments to provide an opportunity for Dual Credit. Her specialty is increasing diversity in the field of computer science.

- Dr. Sara Fry from **Boise State University** is working closely with our staff and a previous Booth Marian Pritchett School graduate to build a mentor program for our students who choose to attend Boise State. She has also established a scholarship fund for our graduates.

Other collaborative relationships and referral sources include:

- Idaho Department of Health and Welfare
- Idaho Central District Health
- Agency for New Americans
- International Rescue Committee
- Create Common Good
- Life's Kitchen
- The Cabin's Writers in the School program (WITS)
- Micron Foundation's K-12 Outreach program
- Idaho Youth Ranch
- Casey Family Programs
- Baby Steps
- Headstart
- The House Next Door, Nampa, ID
- Ada County Juvenile Probation
- Idaho Coalition Against Sexual and Domestic Violence - Center for Healthy Teen Relationships
- Several bachelor's and master's level counseling and social work programs
- Various charitable organizations and individuals who provide both new and used inventory for the school store

School Leadership and Management

Leadership Team

~~The school leadership team consists of the Executive Director and Director of Academics. Cardinal Academy's Executive Director is the lead school administrator and will be responsible for the overall leadership and operation of the school. The Executive Director will report to and be evaluated by the Board of Directors of Cardinal Academy. The Director of Academics will report to the Executive Director and is responsible for the academic leadership and educational program of the school. The Executive Director will follow the Code of Ethics for Idaho Professional Educators and maintain a staff who also follow the same code.~~

The Board of Directors will contract with Elevate Academy Foundation ("EAF" or "the Executive Director"), led by Matt Strong and Monica White, to provide school leadership and management services in an advisory capacity for a minimum of two years. These services will include: providing back-office support related to budgeting, purchasing, payroll, HR functions and compliance and reporting; hiring staff and providing oversight and professional development; designing and implementing a student recruitment and retention strategy; and integrating academic curriculum, personal development curriculum and credit recovery options for students. EAF will advise the Board of Directors in identifying and hiring staff, including a lead teacher and lead student recruiter. EAF will report to and be evaluated by the Cardinal Academy Board of Directors.

Monica White and Matt Strong have been in the education field for over 20 years each. Their experience ranges from classroom teacher to building administration to central office superintendent roles in large districts. Most importantly their passion for at-risk and disenfranchised youth that were not finding success in the traditional system based on their personal circumstance brought them to develop Elevate Academy and EAF. Their work at Canyon Springs High School working with at-risk youth in a turnaround situation, positions them uniquely to understand schools in need of turnaround services. The EAF team is staffed with seven employees in addition to Monica and Matt, including an experienced charter school CFO, an academic team, and a COO who will manage federal programs as it relates to state reporting during the 2022-2023 school year.

Overall Leadership

The Executive Director will be responsible for the overall leadership and operational management of Cardinal Academy. The Executive Director will work with the Board of Directors to develop, amend, and implement the school budget and the overall governing policies and strategies. The Executive Director will also manage other operational responsibilities, including: managing the finances, purchasing, and payroll (with Bluum support) and collaborating with The Salvation Army on the facility, food service, child care services and likely transportation for the students. The Executive Director will know and understand state and federal law requirements. The Executive Director will have knowledge and capable skills in effective personnel management strategies, and in restorative practices of mediation and

agreement to successfully implement the student disciplinary practices of the school. The Executive Director will hire the faculty and staff, and will manage, and evaluate the Director of Academics, the school nurse, social worker, and academic/career counselor.

Cardinal Academy is a small school with a lean staff. It is imperative that the Executive Director develop a **team of leaders** comprising the faculty and staff, and create an atmosphere of collaboration where the leadership team has a voice in decision making, setting organizational goals and in the implementation of responsibilities. The faculty and staff will meet at least monthly to examine the instructional program, the operation of the school, student concerns, fundraising, and the achievement of the overall mission and vision of the school. Leadership team committees will be created to assist in the overall operation of the school.

The Executive Director will create a viable, vibrant school community where students, faculty, staff, and families develop a pride of ownership. The Executive Director is the face of the school and represents Cardinal Academy in the greater community to communicate the mission and vision, to advocate for the school, to build and maintain collaborative partners, and to bring collaborative partners and other volunteers to campus to instruct and mentor the students. When the community partners and volunteers are an integral part of the school, it gives students a sense of belonging and interdependence in a greater group that will follow them after graduation.

Academic Leadership¶¶

The Director of Academics will assist the Executive Director in monitoring and evaluating the effectiveness of the overall academic program to ensure that strategic academic goals are met. The Director of Academics will develop and implement short- and long-term plans for curriculum and instruction, will collaborate with faculty to create curricular materials, collect and share resources, and will identify and acquire academic resources making sure that it is learner-centered and aligned with Idaho State Standards and the mission of Cardinal Academy. ¶¶

The Director of Academics will be current with best practices for both student instruction and professional development, lead the faculty in continuous improvement of instruction and school culture, and collaborate with faculty to analyze assessment and research data in order to inform and plan instruction around outcomes. ¶¶

The Director of Academics will coach and mentor teachers, modeling best practices across multiple content areas and grade levels. The Director of Academics will know and understand the reasoning and basis for the Layered Curriculum instructional model, and will plan professional development to ensure all faculty are knowledgeable and confident in executing this instructional model. The Director of Academics will also collaborate with faculty to prioritize and plan the professional development schedule and Professional Learning Community (PLC) sessions. The Director of Academics will have a firm knowledge of the Danielson Framework in order to evaluate teachers¶¶

Executive Director¶¶

Emily Bergstrom, M.A., School Counselor and Licensed Professional Counselor, Bluum-Idaho New School Fellow¶¶

Emily is a master's level counselor, certified in both mental health and school counseling, with more than a decade of extensive experience in the schools working with students, teachers, and administrators. Emily has dedicated her career to serving the underserved, especially pregnant and parenting teens and juvenile offenders. At Booth Marian Pritchett School, Emily was part of a strategic planning and continuous school improvement team. She provided the leadership in researching, developing, training, and implementing a schoolwide effort in becoming a "Trauma-Informed School," providing faculty and staff with the necessary knowledge and skills to work effectively with the student population, many of whom experience great trauma and Adverse Childhood Experiences (ACES) that affect their ability to learn. She also provided the leadership in researching, developing, training, and implementing a schoolwide Growth Mindset culture at Booth Marian Pritchett School. Emily researched and provided training to faculty and staff on the effects of burn-out working with traumatized students and then monitored faculty and staff for symptoms and provided intervention. She collaborated with The Salvation Army social worker to develop and implement the pregnancy, parenting, and life skills programs and services to our students. Emily has strong ties to stakeholders in the Boise community and she coordinated student services with more than 20 collaborating community partners.¶¶

Emily has a vision to build a team to create a therapeutic and accessible educational experience for Idaho's most vulnerable young adults and their children. She believes in a school program that provides students with their most basic needs, including mental health counseling for all students who seek it. By meeting basic needs first, students can access education in ways they have not been able to before. Students will be able to invest in their own education by developing their own plan and goals for learning. These emerging adults can then create the kind of life they desire for themselves and their children.¶¶

Emily has completed the required three-credit Danielson Model Teacher Evaluation course through Idaho State University, as required for the Public Charter School Administrator Certificate.¶¶

Additionally, during her fellowship year with Bluum, Emily will participate in Idaho-specific training on financial management and legal requirements for schools. She will participate in hands-on learning through residencies in some of Idaho's high-performing public charter schools. Emily will undergo professional development to effectively coach staff and improve their performance, while also regularly being coached by an expert in the field.¶¶

Emily will continue to learn and reflect on areas of development while she works to create a positive school culture and learning environment with high expectations for students. She will be evaluated by the Cardinal Academy board using the Idaho Standards for Effective Principals.¶¶

Director of Academics¶¶

Deborah Hedden-Nicely, M.A. Curriculum and Instruction, Bluum Idaho New School Fellow

Deborah has had an accomplished career as a professional educator and site administrator at the secondary and post-secondary level. She has comprehensive experience in teaching students of all ability levels, ages 13 to adult, creating special programs for at-risk students, especially pregnant and parenting students, and in differentiating curriculum to ensure that all students have the opportunity to learn and succeed.

During her tenure at the Booth Marian Pritchett School, Deborah worked with faculty in analyzing and evaluating assessment data and best practices research in order to inform, enrich, and differentiate their instruction to improve student academic success. She worked closely with Emily Bergstrom, academic/career counselor, in leading the faculty and staff in continual school improvement through professional development in-service during the Professional Learning Community (PLC) time and weekly faculty/staff meetings.

In her 40-year career, Deborah has developed an extensive background in managing an organization and business, including budgetary and financial responsibilities, hiring and managing staff as well as administering the day-to-day operation of a unique speciality high school and a business.

Deborah believes in a *circle of equals* management style, honoring and welcoming all ideas and concepts to the table, empowering people to have ownership in the organization. She believes entrepreneurship, creating and innovating, is as essential in education as it is in business.

Deborah has completed the three-credit Danielson Model Teacher Evaluation course through Idaho State University. As part of her Bluum fellowship, Deborah is committed to her own continued professional development by learning further about the prevailing best practices in coaching and mentoring faculty, and current directions in effective academics and teacher professional development. She plans on engaging in hands-on experiences in other public charter schools, enrolling in other professional development courses, and by engaging in coaching sessions with an instructional professional.

¶¶

Elevate Co-Founder and CEO

Monica White

Monica White has been in the education profession for 17 years. During this time, she has served as a teacher, coach, principal and assistant superintendent. She believes that there is genius in all of us and that the best way to create success is to ensure that people have the tools to work and live with passion and purpose. Monica is an inspired and passionate educator who is committed to being an advocate for teachers, and even more importantly, students. She's a problem-solver who will work tirelessly with her team to find opportunities and resources to help all students become successful.

Monica believes in empowering people, and she works intentionally to empower her staff so that they can deliver the best education to students. When offering professional development opportunities, Monica spends equal time building the staff up personally, improving their professional efficacy, and having fun and coming together as a team.

Monica is Co-Founder of Elevate Academy, a proposed public charter school intends to train and create a pipeline of highly-skilled, employable workers that meet the needs of Idaho industry and business, while empowering students to be leaders in their own lives.

Elevate Co-Founder and Director of Growth and Development

Matt Strong

Idaho New School Fellow - 2017

Matt Strong has been an educator since 1995. His tenure includes time at Weiser Middle School, Skyview High School and Caldwell High School before becoming the assistant principal at Canyon Springs High School. Matt has been deeply involved in athletics; coaching football at every level, including his current position as an assistant football coach at the College of Idaho. He was formerly a District 3 basketball referee. Matt is very community minded and serves with Caldwell Proud, a community improvement organization, and Go Purple, a College/Community collaboration initiative. As an assistant principal, Matt has been an instrumental part in transforming Canyon Springs High School from a school in need of restructuring to a school that has become a model throughout the state of Idaho.

Matt is a master at working with and reaching at-risk students. He has a gift for making them believe in their potential, and providing them the opportunity and resources necessary to reach it. Matt's strengths lie in community relations and recruitment, classroom management and school culture.

Matt is Co-Founder of Elevate Academy, a proposed public charter school intends to train and create a pipeline of highly-skilled, employable workers that meet the needs of Idaho industry and business, while empowering students to be leaders in their own lives.

Cardinal Lead Teacher

Jamie Garn

Jamie was born and raised in northern Utah. She began her career in education as an English and health teacher in 2006 and completed her Master's in Educational Administration in 2019. She has taught students ages 13-18 in a variety of levels ranging from struggling learners in remedial courses to advanced learners in Honors. Her passion is working with students facing obstacles in their academic progress to find success and prepare for the future.

Fair Hiring Procedures

Cardinal Academy and its Board will comply with all fair hiring procedures as required by the state of Idaho under the advice of The Idaho Department of Labor and the Idaho Human Rights Commission.

Virtual and Blended Programs

A blended program will be implemented through the use of the LiFT LMS. LiFT is a cloud based Learning Management System built for Mastery Learning and is designed to track student mastery by standard using a scaffolded approach, which fits well with the layered curriculum. All Cardinal students will receive a chromebook in order to be able to work from home when necessary and an administrative team will be overseeing student devices. All teachers and staff will receive intensive LMS and technology training from academic and curricular liaison and administration. This technology has been used in other school where students are making or exceeding expected growth targets based on the STAR assessment, which is nationally normed for at-risk youth, in reading and math.

Other schools that use LiFT as a learning management system, have also reported success using it as a cloud-based platform that supports mastery learning and enables a cross-disciplinary approach. LiFT also enables teachers to create a continuous feedback loop on assignments and projects, which benefits an integrated project-based curriculum that can be easily modified in house and can be accessed virtually or in a blended model. This type of learning management system allows students to focus on learning skills with repeated attempts for improvement to reach mastery.

Engaging the students and families in blended learning involves putting the focus on the needs of that student as a person. Credit recovery can be conducted through the LiFT LMS when the student is virtual. Ideally our students will be able to attend school in person full time, but in the case of extenuating circumstances that prevent students from attending, in person will be dedicated to providing the student the skills they need the most. The virtual side of the process will allow students to continue mastering standards and work towards graduation requirements when they are not able to be in the building.

Based on the student's accessibility to the school during regular school hours, Cardinal's teachers will partner with the student to make sure the student has the adequate time needed in each academic area when in person.

Ultimately, Cardinal students will be able to take advantage of the LiFT LMS to recover required credits for graduation while being able to utilize excellent training and learning in skilled areas. Most alternative school students severely off track for graduation are placed in full time credit recovery programs, leaving no time for other areas that developed such as the topics covered in the FCS and Resilience and Well-being classes that help students develop life long skills and sustainable employment after graduating. Cardinal maximizes a student's time in the building by providing access to

classes while allowing the student to recover credits and work towards graduation through a blended classroom environment.

Every Cardinal Academy student will be provided a laptop computer to use at school and at home. Our ultimate goal is to have students present on our campus in order to utilize all of the services available, but when students are unable to attend school due to pregnancy complications, maternity leave, and family illness, students will already be equipped to continue their studies at home. By expanding access, we can ensure pregnant and parenting students are receiving the education for which they are entitled. Cardinal Academy will utilize an online educational platform for credit recovery and to supplement with courses we cannot offer onsite. Further, by having an online platform established, we will be better prepared in the event of another pandemic.¶¶

Other services can be offered virtually, as well. The fields of telehealth and telemental health have expanded this year in new and exciting ways. Counseling and social work services can be delivered safely and securely in accordance with HIPAA and state/national ethical guidelines. Additionally, the student store, The Salvation Army food pantry, and WIC clinic, can be accessed with appointments, social distancing and wearing masks.¶¶

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CARDINAL ACADEMY

5 Year Budget Plan

	<u>2022-2023</u>	<u>2023-2024</u>	<u>2024-2025</u>	<u>2025-2026</u>	<u>2026-2027</u>
Enrollment	45	60	75	75	75
Summer Enrollment	0	20	30	45	45
<u>REVENUE:</u>					
Salary Apportionment	\$ 240,900	\$ 341,936	\$ 444,015	\$ 483,913	\$ 502,070
Benefit Apportionment	\$ 47,192	\$ 66,985	\$ 86,983	\$ 94,799	\$ 98,355
Entitlement	\$ 134,715	\$ 187,418	\$ 244,065	\$ 263,608	\$ 271,516
Transportation	\$ 60,000	\$ 60,000	\$ 40,000	\$ 40,000	\$ 40,000
State Special Distributions	\$ 63,720	\$ 77,741	\$ 88,904	\$ 90,398	\$ 90,398
Federal Funds	\$ 130,000	\$ 130,000	\$ 30,000	\$ 30,000	\$ 30,000
Other Local Revenue	\$ 250,000	\$ -	\$ -	\$ -	\$ -
TOTAL REVENUE	\$ 926,528	\$ 864,080	\$ 933,966	\$ 1,002,717	\$ 1,032,339
<u>EXPENDITURES</u>					
Salaries	\$ 425,532	\$ 431,831	\$ 468,532	\$ 485,829	\$ 508,377
Benefits	\$ 168,962	\$ 174,087	\$ 192,063	\$ 200,388	\$ 210,044
Educational Programs	\$ 97,233	\$ 99,178	\$ 101,161	\$ 103,184	\$ 105,248
Board of Directors / Administration	\$ 31,100	\$ 33,322	\$ 35,588	\$ 37,900	\$ 40,258
Facilities Payment (Lease &/or Debt Service)	\$ 20,000	\$ 20,400	\$ 20,808	\$ 21,224	\$ 21,649
Other Facilities (Maintenance, Utilities,Etc)	\$ 5,000	\$ 5,100	\$ 5,202	\$ 5,306	\$ 5,412
Transportation	\$ 15,500	\$ 15,810	\$ 16,126	\$ 16,449	\$ 16,778
Administrative Contract	\$ 80,000	\$ 80,000	\$ 80,000	\$ 80,000	\$ 80,000
TOTAL EXPENDITURES	\$ 843,327	\$ 859,727	\$ 919,481	\$ 950,280	\$ 987,766
OPERATING INCOME (LOSS)	\$ 83,201	\$ 4,352	\$ 14,485	\$ 52,437	\$ 44,573

J.A. and KATHRYN
ALBERTSON FAMILY
FOUNDATION

May 20, 2022

To: Idaho Public Charter School Commission
Chairman Alan Reed
Vice-Chair Sherrilynn Bair

RE: Support for Cardinal Academy

Dear Chairman Reed and members of the Idaho Public Charter School Commission,

The J.A. and Kathryn Albertson Family Foundation (JKAF) wrote to you approximately two years ago requesting your support of Cardinal Academy, a public charter school designed for pregnant and parenting teens and other at-risk students. During that time, we also made a financial commitment to help the school as it launched and have followed through with that commitment.

We still stand strongly behind our belief that Cardinal Academy has the tremendous opportunity to make a difference for one of the most vulnerable populations in our community, pregnant and parenting teens, and to ensure that as many of them as possible graduate from high school. With 70% of teen moms dropping out of school after giving birth, having a safe and supportive school dedicated to the unique needs of teen parents will be the difference between those students staying in school and graduating, or dropping out and having few prospects for a bright future.

This letter is to let you know that we have committed to provide financial support to Cardinal Academy for the 2022-2023 school year, in the amount of \$250,000. We understand it is possible they will need an additional year of support for 2023-2024 and we have let the Cardinal Academy board know we are open to receiving a request for financial assistance for that school year as well.

Many thanks to you and the Commission staff for your continued support of Cardinal Academy as they navigate our changing education landscape and ensure that pregnant and parenting teens have a safe, welcoming, and supportive school designed to meet their unique needs.

Sincerely,



Roger Quarles
Executive Director
J.A. & Kathryn Albertson Family Foundation

J.A. AND KATHRYN ALBERTSON FOUNDATION, INC.
Grant Agreement

(April 1, 2021 through July 31, 2025)

Project Title:	Cardinal Public Charter School
ID #:	9278
Grantor:	J.A. and Kathryn Albertson Foundation, Inc. ("Foundation")
Grantee:	Cardinal Academy 9492 W. Emerald Boise, ID 83704
Contact Person:	Emily Bergstrom, Executive Director ebergstrom@bluum.org
Grant Period:	4/1/2021 - 7/31/2025
Total Award:	\$423,000.00

Specifications of the Grant Award:

1. **Project Description:** With the closure of the Boise School District's (BSD) Booth-Marian Pritchett High School for pregnant and parenting teens, Cardinal Academy is poised to fill this much needed gap in specialized education for at-risk students. They plan to provide a rigorous academic program to pregnant and parenting teens in a supportive environment where students are prepared for parenthood, college, career, and life. The school offers a powerful example of how charter schools can fill voids school districts are unable or unwilling to fill.
2. **Project Objectives:** Cardinal Academy, located in the Salvation Army's new Booth Campus, will serve the unique needs of pregnant and parenting high school students. This location will provide Cardinal Academy space to accommodate 140 students in grades 9-12, with a broad array of college and career preparation. They will work with community partners to provide the social and emotional supports young parents need to complete high school and become productive members of the community.
3. **Expected Results and Measurements:** See Appendix A (attached)
 - Alternative Math and ELA Mastery to reflect a 10% increase (at a minimum) over the previous year – working toward an 80% or higher goal.
 - Alternative college and career readiness to reflect a 10% increase (at a minimum) over the previous year – working toward a 75% or higher goal.
 - In collaboration with an academic/career counselor each student will create an education map to achieve graduation and include their post-secondary plans.
 - By year-5 of school operations have 80% or higher graduation rate.
 - Use of STAR and ISAT as assessments of student performance.

4. **Participation Requirements:** Cardinal Academy must meet the conditions placed upon them for approval of their charter:
 - Cardinal must provide evidence of \$423,000 in philanthropic gift/grant for fiscal stability.
 - Cardinal must have a fully executed lease stating that the annual lease payment will not exceed state reimbursement for facilities.
 - Cardinal must enroll at least 50 students by May 26th.
5. **Program Accountability:** Cardinal Academy is responsible for the implementation and evaluation of the project outlined above.

5.1 Retention of Key Personnel: The J.A. and Kathryn Albertson Foundation, Inc., recognizes that the participation of Emily Bergstrom and Deborah Hedden-Nicely of Cardinal Academy, is critical to the success of the Cardinal Public Charter School project. If the key personnel noted above ceases to be directly involved in this project, Cardinal Academy must immediately notify the Foundation Program Officer for this grant. Upon such notification, the Foundation will hold the grant, subject to notification of replacement of the personnel. At such time the Foundation will make a written determination as to the feasibility of continuing the grant agreement. The Foundation reserves the right to reclaim any remaining grant funds and/or suspend the disbursement of any remaining grant payments in the event of a change in key personnel.

6. **Fiscal Accountability:** These funds have been awarded by the Foundation based on the budget indicated in the Cardinal Academy proposal approved by the Foundation's Board on February 23, 2021. All grant funds must be expended for charitable or educational purposes. It is understood that the funds will be used in accordance with the approved budget. Line-item variations greater than \$5,000 that are in excess of 10% of the amount originally approved for the budget category must be requested in advance in writing and approved by the Foundation Program Officer. Any grant funds as well as any interest earned thereon not expended or committed for the specified purposes as stated in the Cardinal Academy proposal approved by the Foundation's Board on February 23, 2021, or within the Grant Period stated above, will be returned to the Foundation. If funds are expended in violation of the Agreement, the Grantee shall repay that portion of the grant not used for the intended purpose.

6.1 Budget: See Appendix B (attached)

Total	Multiple Payments	\$423,000.00
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6.2 Expenditure Prohibitions: Grantee shall not use any of the funds received from the Foundation:

- (a) To carry on propaganda, or otherwise to attempt, to influence legislation (within the meaning of Internal Revenue Code ("IRC") Section 4945(d)(1);
- (b) To influence the outcome of any specific public election, or to carry on, directly or indirectly, any voter registration drive (within the meaning of IRC Section 4945(d)(2);
- (c) To make any grant to an individual or other organization that does not comply with the requirements of IRC Section 4945(d)(3) or (4);

- (d) To undertake any activity for a non-charitable purpose, as defined in IRC Section 170(c)(2)(B);
- (e) To provide material support or resources to any individual or entity that Grantee knows, or has reason to know, is an individual or entity that advocates, plans, sponsors, engages in, or has engaged in terrorist activity; or
- (f) To pay administrative indirect costs that are not directly related to Cardinal Public Charter School as defined in this Agreement.

6.3 Funds Disbursement: Funds will be disbursed as follows (upon receipt of signed Agreement and verification of charter authorization):

Schedule Date	Notes	Status	Amount
7/1/2021	Payment – 1	Scheduled	\$32,000.00
10/1/2021	Payment – 2	Scheduled	\$221,000.00
10/2/2022	Payment – 3	Scheduled	\$56,000.00
10/1/2023	Payment – 4	Scheduled	\$60,000.00
10/1/2024	Payment – 5	Scheduled	\$54,000.00

Release of subsequent payments toward multi-year awards will be made only after the required reports have been received and approved by the Foundation.

6.4 Accounting and Record Keeping Procedures: Cardinal Academy shall separately account for the Grant Award funds on its books and records. Any interest earned must be expended for the purposes of the Project and Grant Award. Cardinal Academy shall maintain records of receipts and expenditures relating to the Grant Award and shall make its books and records available to the Foundation at reasonable times. Records of all expenditures from Grant Award funds, interest-earned and copies of reports submitted to the Foundation, shall be kept by the Grantee for at least four years after completion of the use of the Grant Award funds.

7. **Further Assurances:** Grantee shall take all such actions reasonably requested by the Foundation, and shall comply with the provisions of any future regulations promulgated under IRC Sections 4942 to 4945 that are applicable to the Grant Award, to ensure that the Grant Award (a) will constitute a “qualifying distribution” by the Foundation within the meaning of IRC Section 4942(g), (b) will not constitute a “taxable expenditure” by the Foundation within the meaning of IRC Section 4945, and (c) will not violate the USA PATRIOT Act, Executive Order 13224, or any other applicable law, regulation, or order.
8. **Indemnification:** Grantee acknowledges that the Foundation has no control over the operations, acts or omissions of the Grantee. Grantee shall indemnify and hold the Foundation harmless from and against any claim, liability, loss, damages, fines, penalties, and expenses (including but not limited to reasonable legal fees and costs) arising out of the project outlined above, any breach by the Grantee of this Agreement, or any act or omission of the Grantee in connection with project activities.

9. **Reporting Requirements:** Cardinal Academy shall submit the following reports to the Foundation:

- **Mid-Year Progress Report due on or before January 31 of each year until enrollment targets are met.** The Performance Report template details the specific reporting requirements to be included in this report.
- **Annual Report(s) due on or before July 31 of each year during the term of the grant agreement.** The Annual Report shall be a full and complete report on the use of grant funds to-date, compliance with the terms of the grant, and the progress made by Grantee toward achieving the purposes for which the grant was made.
- **Annual Financial Report due on or before July 31 of each year during the term of this Grant Agreement.** Cardinal Academy shall submit a Financial Report including fiscal year-end balance sheet and annual statement of operations to the Foundation. This should be sent to the Foundation annually and shall include an attestation as to the accuracy of the financial report by the responsible financial officer or a Certified Public Accountant.

Grantee also shall promptly report to the Foundation any change in its corporate or tax status, or any material change in the conduct of the program that the grant is intended to support.

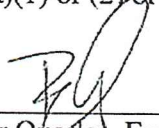
10. **Communications:** If Cardinal Academy wants to issue a news release to inform the community of this project, the Foundation requires review of it prior to release. When referring to the Foundation, the title of “J.A. and Kathryn Albertson Foundation” should be used and the focus of the release should be on the Project rather than the Foundation. A copy of all news releases should be sent to the Foundation. Cardinal Academy should not purport to speak on behalf of the Foundation. If clarification of Foundation activities or position is required, a Foundation officer should be contacted.
11. **Termination of Grant:** The Foundation reserves the right to rescind the grant or cease any further payments of the grant award if---
- (a) The original purposes of the grant are changed in any material respect without the Foundation’s prior approval;
 - (b) The Grantee’s capacity to accomplish the purposes of the grant have been materially adversely affected;
 - (c) Grantee has failed to comply with any of the terms or conditions of the grant in any material respect; or
 - (d) There is a change in key personnel as outlined in section 5.1 of this agreement.
12. **Funding:** This is a multi-year grant that the Foundation has agreed to fund based on the Cardinal Academy proposal approved by the Foundation’s Board on February 23, 2021 and described in this Grant Agreement. **Notwithstanding anything in this Agreement to the contrary**, the Foundation reserves the right, in its sole absolute discretion, to terminate funding for any reason at any time during the term of the Grant Agreement. This shall be in addition to the rights of termination set forth in section 11 of this Grant Agreement.

13. Additional Requirements: Grantee shall:

- (a) Honor all timelines specified in the Agreement.
- (b) Share all relevant information on project design, implementation and project outcomes with school districts or other institutions.
- (c) Send the Foundation copies of any publication that describes or is a result of this particular project.
- (d) Permit the Foundation to include information on this project in annual reports or Foundation publications.
- (e) Consent to a review of operations under this grant by the Foundation, which may include a site visit from Foundation personnel or Foundation contracted evaluators to observe your program, discuss the program and finances with personnel, and review financial and other records and materials connected with the activities of this grant.

14. Entire Agreement: This 5-page Agreement and any referenced attachments represent the entire agreement between the parties. No change or amendment shall be effective unless made in writing and duly executed by the parties. Any proposed changes should be addressed to the Foundation's program officer working on the grant. All references in this Agreement to "IRC" are to the Internal Revenue Code of 1986, as amended, and shall be deemed to include the corresponding provisions of any future federal tax laws and regulations that are applicable to the grant. References to the USA PATRIOT Act are to Public Law No. 107-56

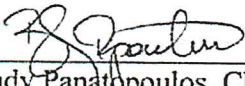
The signatures of Cardinal Academy indicate acceptance by the grantee of all of the terms and conditions of this agreement for grant ID#9278 and confirm the grantee's commitment to the project objectives and expected results outlined above. The signatures of Cardinal Academy also confirm that the Grantee is (a) a tax-exempt organization under IRC Section 501(c)(3) that is not a private foundation by virtue of being described in IRC Section 509(a)(1) or (2) or (b) a governmental unit described in IRC Section 170(c)(1).



Roger Quarles, Executive Director
J.A. and Kathryn Albertson Foundation, Inc.

4-16-21

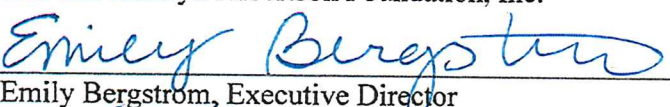
Date



Brady Panatopoulos, Chief Executive Officer
J.A. and Kathryn Albertson Foundation, Inc.

4.19.2021

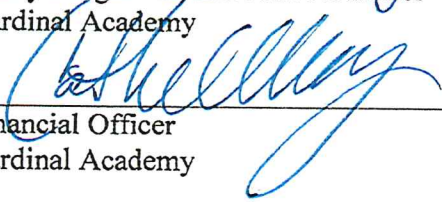
Date



Emily Bergstrom, Executive Director
Cardinal Academy

4-22-21

Date



Financial Officer
Cardinal Academy

4/22/21

Date

APPENDIX A CARDINAL ACADEMY

Benchmarks				
	2021-2022	2022-2023	2023-2024	2024-2025
Assessments	Star for Reading and Math (3 times per year) ISAT	Star for Reading and Math (3 times per year) ISAT	Star for Reading and Math (3 times per year) ISAT	Star for Reading and Math (3 times per year) ISAT
Academic Performance				
STAR	For each grade 9-12, 50% or more of students enrolled for at least 90 days will reach a SGP of 60% or higher.	For each grade 9-12, 50% or more of students enrolled for at least 90 days will reach a SGP of 60% or higher.	For each grade 9-12, 50% or more of students enrolled for at least 90 days will reach a SGP of 60% or higher.	For each grade 9-12, 50% or more of students enrolled for at least 90 days will reach a SGP of 60% or higher.
ISAT	Baseline year: Future targets TBD	TBD	TBD	TBD
Path to Graduation	All students will create an education map to achieve graduation and include their post-graduation plans.	All students will create an education map to achieve graduation and include their post-graduation plans.	All students will create an education map to achieve graduation and include their post-graduation plans.	All students will create an education map to achieve graduation and include their post-graduation plans.
College or Career Readiness	90% of students will a) have established career goals or secured a job in a career of their choice, or b) have been accepted by a post-secondary institution.	90% of students will a) have established career goals or secured a job in a career of their choice, or b) have been accepted by a post-secondary institution.	90% of students will a) have established career goals or secured a job in a career of their choice, or b) have been accepted by a post-secondary institution.	90% of students will a) have established career goals or secured a job in a career of their choice, or b) have been accepted by a post-secondary institution.

APPENDIX A CARDINAL ACADEMY

Pregnancy and Parenting Education	90% of students will be proficient in knowledge and skills for a healthy pregnancy, child development and other parenting best practices, as measured by school-developed assessments	90% of students will be proficient in knowledge and skills for a healthy pregnancy, child development and other parenting best practices, as measured by school-developed assessments	90% of students will be proficient in knowledge and skills for a healthy pregnancy, child development and other parenting best practices, as measured by school-developed assessments	90% of students will be proficient in knowledge and skills for a healthy pregnancy, child development and other parenting best practices, as measured by school-developed assessments
Enrollment				
Targets	120	120	120	120
Financial				
Audits	Clean Audit	Clean Audit	Clean Audit	Clean Audit

Other				
Leadership	Emily Bergstrom as Executive Director or approved successors	Emily Bergstrom as Executive Director or approved successors	Emily Bergstrom as Executive Director or approved successors	Emily Bergstrom as Executive Director or approved successors
Authorizer	In Good Standing with authorizer	In Good Standing with authorizer	In Good Standing with authorizer	In Good Standing with authorizer
Student Retention Rate	Baseline year	TBD based on baseline data	TBD based on baseline data	TBD based on baseline data
Staff Retention Rate	Baseline year	TBD based on baseline data	TBD based on baseline data	TBD based on baseline data
Average Attendance Hours Based on a school year of 1230 total hours	80%	80%	80%	80%

APPENDIX B CARDINAL ACADEMY

6-Year Budget Projections for Cardinal Academy

	Y0 - 2020-21	Y1 - 2021-22	Y2 - 2022-23	Y3 - 2023-24	Y4 - 2024-25	Y5 - 2025-26	Total Request	Per Seat
Average Enrollment	0	119	119	119	119	119		
Actual Headcount (Seats)	0	140	140	140	140	140		
State, Federal and Other Revenues	230,000	1,393,263	1,452,171	1,512,032	1,573,321	1,631,115		
JKAFF Startup Grant Support Request	32,000	221,000	56,000	60,000	54,000	-	423,000	3,021
Total Revenues	262,000	1,614,263	1,508,171	1,572,032	1,627,321	1,631,115		
Operating Expenses	262,000	1,478,114	1,436,163	1,470,798	1,525,742	1,538,571		
Facility Dept Service	-	50,120	56,093	56,093	56,093	65,000		
Total Expenses	262,000	1,528,234	1,492,256	1,526,891	1,581,835	1,603,571		
Net Income	-	86,009	15,915	45,142	45,087	27,545		
Beginning Cash			86,009	101,924	147,065	192,552		
Net Income		86,009	15,915	45,142	45,087	27,545		
Ending Cash:		86,009	101,924	147,065	192,552	220,096		
Days Cash		19.4%	24.6%	34.1%	41.1%	49.2%		

Cardinal Academy Continuation Plan

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Cardinal Academy Continuation Plan

Executive Summary

If this continuation plan is accepted by the Cardinal Academy Board, Monica White and Matt Strong will assume leadership at Cardinal Academy starting June 3, 2022. On April 13th, 2022 the board voted to begin a transition period on May 1, 2022. This includes hiring a lead teacher and transitioning back office support. The new leadership team will hire and oversee the new Cardinal Academy staff in an advisory capacity for a minimum of two years through June 2024.

The primary goals during this transition are to (1) streamline staffing, and (2) enroll a minimum of 60 students, which is the minimum enrollment needed to break even with state funds so that philanthropy is no longer needed for operations. New recruiting and retention efforts will be introduced to increase that population over time using a sustainable growth model. Monica White and Matt Strong have identified and will be asking the board to approve two key leaders to fill the lead teacher and lead recruitment role. Both individuals will be strong classroom teachers as well.

After an initial evaluation the new leadership team is proposing a series of changes in leadership and operations at Cardinal Academy. The primary mission of serving pregnant and parenting students remains the same. The education model and commitment to wrap-around services also remains the same. We believe that all of the design principles stated in Cardinal Academy's Performance Certificate in sections 2 and 3 will remain the same.

Leadership Team

Team

Monica White and Matt Strong are the co-founders of Elevate Academy Network of Schools. The Elevate Network team is staffed with 7 employees in addition to Monica and Matt. Their staff, which includes a high level CFO, is equipped to manage all back office support including budgeting, payroll and HR functions. In addition to back office support the Elevate team has an academic team that can help with the development and integration of academic curriculum, personal development curriculum and credit recovery options. The Elevate team is also bringing in a COO for the 22-23 school year, who will manage federal programs as it relates to state reporting. This team is well equipped to assist in the development of programs.

Monica and Matt have been in the education field for over 20 years each. Their experience ranges from classroom teacher to building administration to central office superintendent roles in large districts. Most importantly their passion for at-risk and disenfranchised youth that were not finding success in the traditional system based on their personal circumstance brought them to develop Elevate Academy. Their work at Canyon Springs High School working with at-risk youth in a turnaround situation, positions them uniquely to understand schools in need of turnaround services.

Services

The Elevate team (Appendix E) under this proposal will provide professional development, leadership advising and development, back office support including budgeting, purchasing, and payroll, board reports, monitoring and developing all state reports.

The team will work with teacher leadership at the school level to develop a comprehensive recruitment and retention of students plan.

The new leadership team will continue to facilitate positive integrated relationships with the Salvation Army team and work to establish a written MOU by the end of August to ensure ongoing partnerships that will benefit students at the highest level (Appendix B).

Budget Justification

5% or an average of 2 hours per week of Elevate Network staff's 9 employees up to 18 hours per week of Network time will be dedicated to Cardinal Academy. This totals \$80,000 based on a per pupil rate (Appendix D).

Remaining Academic Year 2021-2022

The incoming lead teacher will start between May 1 and May 15th. All existing Cardinal Academy faculty and staff, unless exceptions are negotiated with the new leadership team will have their final day on Jun 2, 2022 . All contracts will be honored through August as originally planned.

Summer 2022

A firm plan for summer school cannot be made until the board votes affirmatively on hiring Matt and Monica. However, they have identified priorities and suggested the following as a possible direction for summer school planning. The highest priority is to serve graduating seniors who need to take credit recovery over the summer. Those students will be served. Additionally, we anticipate and will confirm that the Salvation Army will continue to provide support services for all students, new and continuing enrollees.

School Enrollment and Staffing (not firm)

A second lead teacher will start July 1, 2022. This teacher will work with the 2022-23 staff to create a schedule aligned with the academic priorities mentioned above, create a system for credit recovery and work with the Salvation Army staff to ensure a transition plan that is collaborative in an effort to meet the needs of the students by maximizing all of the combined resources.

It is the intention that the remainder of the positions will be filled by the middle of May for the following school year. Knowing that we will be working with a very modified staffing plan we would start with welcoming any current Cardinal Academy teachers that would like to interview to have the first option. Currently we anticipate needing a science teacher, social studies teacher, and a math teacher. Any teacher that has multiple endorsements and/or would consider additional certifications will help to fill voids in a small teaching staff.

Academic Year 2022-2023

School Enrollment and Staffing

The target population for year one is 60 students. Cardinal Academy served 79 students in year one. The current enrollment is 37 students. Over the course of the year 32 students started Cardinal Academy and left (without graduating). With new approaches to retention and a staff member dedicated to recruitment the goal of 60 students is achievable in the academic year 2022-2023.

The faculty of Cardinal Academy must have among them certifications in Math, Science, English/Language Arts, Social Studies, and Special Education. We propose to hire faculty that have multiple certifications. Additionally, we plan to include medical arts, business, and personal finance. Two faculty members will have dual administrative roles. The English teacher will also be academic lead instructor and the special education teacher will also be the director of recruitment.

- Math/Business/Personal Finance
- English/Academic Lead Instructor
- Science/Medical Arts
- Social Studies
- Special Education/Director of Recruitment

Non-certified Staff

Transportation remains a key component of the retention plan as such we will retain the 3 bus driver positions. Considerations going forward will need to be made for bussing zones and the ongoing cost of bussing. The bussing model is not sustainable in the current funding model. As we move forward strategic plans will need to be addressed to ensure that the state transportation reimbursement model can support such an extensive transportation budget. One item that will need to be considered is moving all transportation personnel to part time positions that do not have benefits. This is a common practice in many schools, however Cardinal and its boundaries create a unique set of circumstances that will need to be explored further.

- Administrative Assistant/Recruiter/Attendance Clerk
- 3 Bus Drivers

Medical/Social/Emotional Support

All Cardinal Academy staff and Booth program staff will undergo professional development specifically tailored to prepare them to handle the unique circumstances that may arise in this student population. The Salvation Army team will help provide additional support, education, and enrichment opportunities through the Booth program. The Booth program will include family and parenting classes, culinary opportunities utilizing their kitchen staff, and fitness utilizing intentional scheduling of the gym.

Homeroom Leaders

All adults involved in the Cardinal Academy and the Booth program will participate in a community-centered approach to attendance and retention. The effectiveness of grouping students with an adult during home room at the beginning of the school day has proven to be an effective retention strategy. These teams hold each other accountable for their attendance and work to track down students that need help getting to school. All adults in both, Cardinal and the Booth program, will have a group of students that they are accountable for to ensure they are showing up to school each day and to offer the Next Step Ready curriculum. Through

collaborative efforts we believe this staffing model will be financially efficient, and academically powerful to ensure student success while providing opportunities to establish relationships.

On Campus Medical Support

Given the nature of this school population the board of directors would like a plan for attending to students' medical needs during school hours. This includes creating a plan to handle over the counter medication, handle medical situations during school hours, and handle any medical emergencies that may occur. All Cardinal Academy staff and Booth Program staff will be trained in procedures handling medical events that may occur within the student population.

On Campus Medical Care

We will work to maintain the relationship with FMRI to provide medical visits on campus.

On Campus Therapy

We will work to create relationships with outside agencies for mental health purposes.

Academic Programming

Improvements to the academic model are proposed to provide daily consistency and accountability for students, keep students moving physically and among content areas, and provide a foundation for relationship and community building. The recommendations below come from two site visits, meetings with staff, and a review of the current academic programming. These are beginning thoughts and as we move forward planning with staff, there will be more ideas generated and potential replacements for these ideas.

1. Move to a default 4 day schedule. This will provide more consistency for students and shorter class periods which will keep the students moving. Friday's will continue to be for extensions and credit recovery.
2. Start everyday with homeroom using the Next Step Ready curriculum.
3. Use the LiFT platform for credit recovery courses. LiFT is a customized Learning Management System.
4. Evaluate and adjust how long each block should be so students can earn credits in condensed time.
5. Attach workforce opportunities to classes to help students launch after graduation.
6. Create a lot of transitions throughout the day to keep students engaged and curious.

Budget Considerations (See Appendix C)

- 1) Anticipate a carry over of 100,000 from FY 22
- 2) Consider all costs of a transition plan, detailed in budget and justification below
- 3) Cover operations gap in year one and two as we grow enrollment.
 - a) Year one at 45 FTE we are anticipating (\$270,771)
 - b) Year two 60 FTE we are anticipating (\$77,087)
 - c) Year three will be a break even year with 75 students

- d) Assumption is $\frac{1}{3}$ students will attend summer school each year
- 4) Goal for year one is to budget for 45 to 60 FTE as the target enrollment.

DRAFT

Appendix A - Management Services

Elevate Network Management Services

Cardinal Academy through the transition will utilize the Elevate Network staff for back office support and leadership development: 5% or an average of 2 hours per week of Elevate Network staff's 9 employees will be dedicated for a period of time to Cardinal Academy.

1. Selection of Leadership and staffing to include all services outlined in professional services agreement. Some highlights include;

a. Monica White and Matt Strong will utilize their connections to the greater Treasure Valley community to find the right person to lead Cardinal through this transition. We have strong candidates we have spoken with that are excited and willing to take on this challenge.

2. Leadership development and ongoing support

a. Led by Matt Strong Cardinal Academy leadership will be a part of all leadership retreats, book study's and one on one coaching throughout the year. Individual mentorship and coaching will occur weekly for a minimum of 2 hours and will diminish as capacity is built within the system and the leadership team.

3. Finance Back Office Support will be led and supported by Darren Uranga, CFO for Elevate Academy Network. Supports will include but are not limited to:

- a. Payroll
- b. Benefits processing
- c. Accounts payable
- d. Budget monitoring

4. ISEE and state data collection will be led by Colton Sweesy Operations, Director.

5. Federal Programs reporting and compliance will be led by Colton Sweesy, Operations Director.

6. Academic and curriculum support will be led by Tegan Byerly, Academic Liaison.

7. Board Meeting Reporting will be led by Monica White with the intention of transition to local leadership within the year.

8. Transportation compliance and reporting will be led by Kelly Culver and overseen by Matt Strong.

Appendix B - Teacher Leader Roles

TEACHER LEADER ROLES

It is imperative that we have leadership in place, however with the funding model being set conservatively at 45 students all staff members must engage in teaching students daily. We have identified two teachers that will take on leadership roles. One leader will focus on academic programming and teacher leadership, while the other leader will focus on recruitment and retention of students.

Academic Leader Roles and Responsibilities. 5 FTE combined with teacher roll for 1 FTE:

- 1) Professional Development for staff
- 2) Train and implement the use of LiFT Learning management system
- 3) Train and Implement the use of Next Step Ready Curriculum
- 4) Hold weekly collaborative meetings with Salvation Army Staff to identify areas of concern, what is going well and next steps to enhance opportunity for students
- 5) Co-create reports to inform the board of lessons learned, successes, and next steps
- 6) Participate in leadership training and mentoring with Elevate Network Staff
- 7) Approve local purchases
- 8) Troubleshoot daily transportation needs
- 9) Manage student behavior as needed.
- 10) Collaboratively create an inspiring relevant system of education that meets the needs of the students you serve so they want to come to school daily.

Recruitment Leader Roles and Responsibilities .5 FTE, combined with teacher role for 1 FTE.

- 1) Develop in conjunction with the Salvation Army Staff an ongoing recruitment plan

- 2) Develop and manage routines with partners for referral for students as needed
- 3) Develop and communicate recruitment goals for startup and ongoing recruiting metrics to ensure school is meeting enrollment targets
- 4) Develop a system for daily tracking of absent students, and make adjustments to get them to school when possible.
- 5) Work with support systems to remove barriers students may have that are preventing them from coming to school.
- 6) Directly communicate daily with the Academic leader to ensure plans are being carried out and collaborate best practices for ensuring all students are attending school in a consistent manner.

Appendix C - Budget

CARDINAL ACADEMY						
5 Year Budget Plan						
	<u>5 Month Transition</u>	<u>2022-2023</u>	<u>2023-2024</u>	<u>2024-2025</u>	<u>2025-2026</u>	<u>2026-2027</u>
Enrollment		45	60	75	75	75
Summer Enrollment		0	20	30	45	45
REVENUE:						
Salary Apportionment	\$	240,900	\$ 341,936	\$ 444,015	\$ 483,913	\$ 502,070
Benefit Apportionment	\$	47,192	\$ 66,985	\$ 86,983	\$ 94,799	\$ 98,355
Entitlement	\$	134,715	\$ 187,418	\$ 244,065	\$ 263,608	\$ 271,516
Transportation	\$	60,000	\$ 50,000	\$ 40,000	\$ 40,000	\$ 40,000
State Special Distributions	\$	63,720	\$ 77,741	\$ 88,904	\$ 90,398	\$ 90,398
Federal Funds**	\$	130,000	\$ 130,000	\$ 30,000	\$ 30,000	\$ 30,000
Other Local Revenue	\$	-	\$ -	\$ -	\$ -	\$ -
TOTAL REVENUE	\$ -	\$ 676,528	\$ 854,080	\$ 933,966	\$ 1,002,717	\$ 1,032,339
EXPENDITURES						
Salaries	\$	37,500	\$ 425,532	\$ 451,831	\$ 468,532	\$ 485,829
Benefits	\$	7,500	\$ 168,962	\$ 184,087	\$ 192,063	\$ 200,388
Educational Programs	\$	10,000	\$ 97,233	\$ 99,178	\$ 101,161	\$ 103,184
Board of Directors / Administration	\$		\$ 31,100	\$ 33,322	\$ 35,588	\$ 37,900
Facilities Payment (Lease &/or Debt Service)	\$		\$ 20,000	\$ 20,400	\$ 20,808	\$ 21,224
Other Facilities (Maintenance, Utilities,Etc)	\$		\$ 5,000	\$ 5,100	\$ 5,202	\$ 5,306
Transportation	\$		\$ 15,500	\$ 15,810	\$ 16,126	\$ 16,449
Administrative Contract	\$	30,000	\$ 80,000	\$ 80,000	\$ 80,000	\$ 80,000
Cash on Hand Reserve***	\$	100,000	\$ 103,972	\$ 41,439	\$ -	\$ -
TOTAL EXPENDITURES	\$ 185,000	\$ 947,299	\$ 931,167	\$ 919,481	\$ 950,280	\$ 987,766
OPERATING INCOME (LOSS)	\$ (185,000)	\$ (270,771)	\$ (77,087)	\$ 14,485	\$ 52,437	\$ 44,573

* Year 1 Revenue is based on enrollment funding, and Year 2-5 are based on ADA funding by the State

**In Year 1 & 2, the federal funds includes \$100,000 of ESSER funds in each year.

***In Year 0, funds need to be received by June 30th to ensure a positive balance on the FY 2022 audit report. In Year 1, it would get the school to 45 days cash on hand. In Year 2 it would get the school to 60 days cash on hand.

	<u>Transition</u>	<u>Year 1</u>	<u>Year 2</u>	<u>Total</u>
Budget Request from JKAF	\$ 185,000	\$ 275,000	\$ 80,000	\$ 540,000

Appendix D - JKAF Request

JKAF Support needed

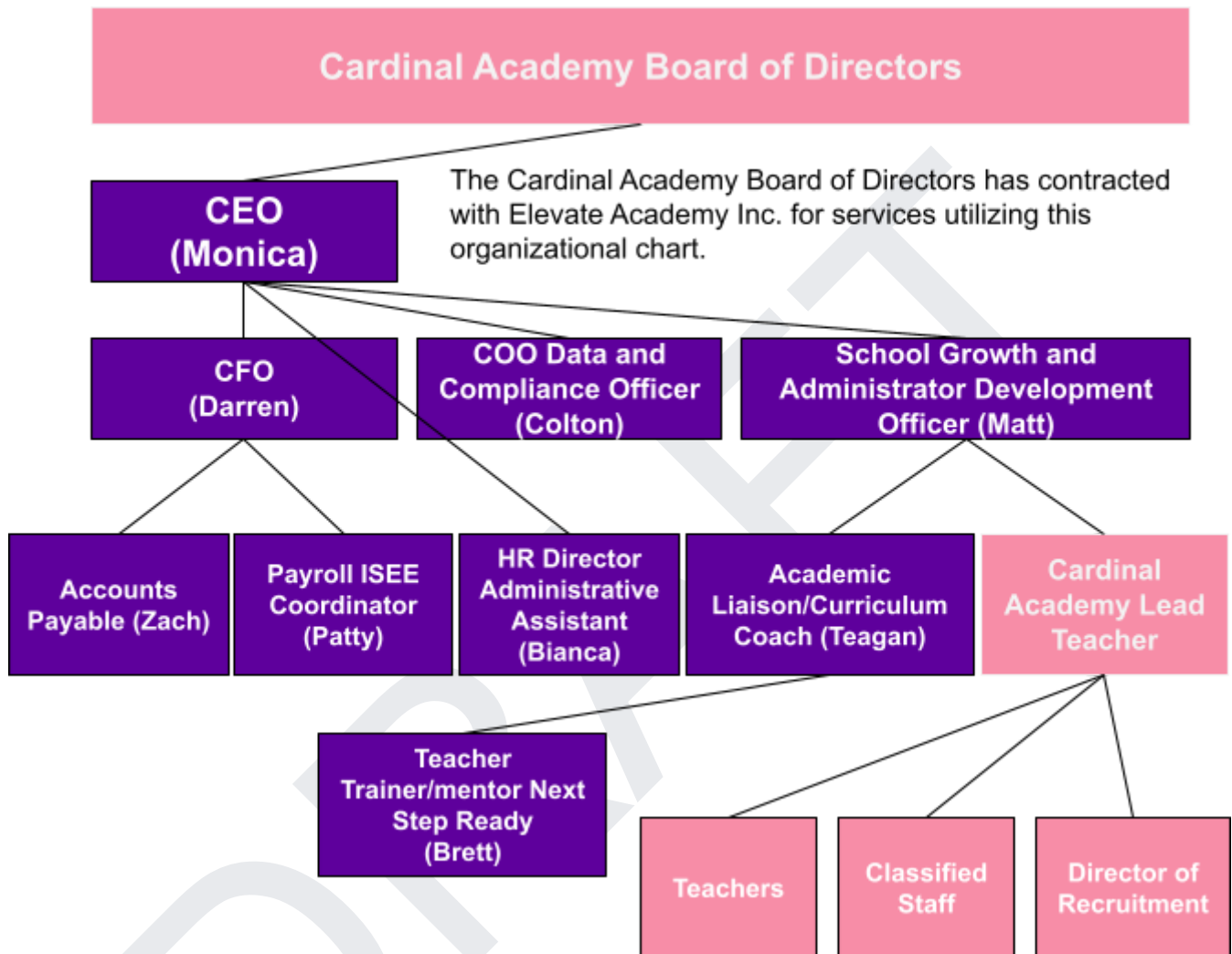
Transition: 185,000

FY 2023: 275,000

FY 2024*: 80,000

***Enrollment must maintain 75 ADA to sustain beyond 2024 without additional philanthropy funding.**

Appendix E Network ORG Chart



PROFESSIONAL SERVICES AGREEMENT

This Agreement is entered into between Elevate Academy Inc. operating as an Idaho non-profit organization (hereinafter referred to as “EAF”) and Cardinal Academy Inc., operating as an Idaho public charter school (hereinafter referred to as “CA”).

It is hereby agreed by both parties that:

DURATION OF AGREEMENT

The period of this Agreement will commence on the _____ and expire on June 30th, 2023. This Agreement is contingent upon the availability of funds to CA. At the discretion of the parties, the Agreement may be renewed on an annual basis for additional one-year terms.

RELATIONSHIP OF PARTIES

In performing services under this Agreement, EAF and CA shall remain separate and distinct Agencies.

SERVICES TO BE RENDERED

EAF shall render the professional services enumerated on Attachment A, attached hereto and made a part of this Agreement, as if set forth fully herein. EAF shall provide an annual report to the Board of Directors indicating the services EAF has provided to CA, as contemplated by this Agreement.

RECORD KEEPING

EAF shall be responsible for maintaining complete and accurate records documenting the professional services provided pursuant to this Agreement. Upon written request, EAF shall submit copies of the records to CA within ten (10) working days of the date requested. Additionally, upon reasonable notice CA shall have the right to review such records at any time during business hours at EAF’s office.

STUDENT DATA PRIVACY AND SECURITY

Both parties to this Agreement acknowledge their obligation to comply with the Idaho Data Accountability Act and further acknowledge the following requirements are being met under this Agreement:

- (a) All information regarding services provided pursuant to this Agreement, including, but not limited to, the student’s identity and the nature of services rendered, shall be confidential and comply with all federal and state laws;
- (b) Administrative Security, Physical Security, and Logical Security controls are in place to protect student data from a data breach or unauthorized data disclosure;
- (c) Personally identifiable information (PII) is restricted to access only by authorized staff who require such access to perform their assigned duties;

- (d) The parties are prohibited from using student data and PII for secondary uses including, but not limited to, sales, marketing, or advertising;
- (e) EAF and CA agree to indemnify and hold harmless the other party from any liability, including, but not limited to, costs, fines, expenses, and attorney fees, resulting from EAF's performance of the services provided under this Agreement and/or non-compliance with state and federal law regarding Student Data Privacy and Security; and
- (f) EAF and CA represent and warrant that they have an appropriate records retention schedule and/or policy for the destruction of data that is consistent with federal and state law.

CONSENT/AUTHORIZATION TO ACCESS EDUCATIONAL RECORDS OR PROTECTED HEALTH INFORMATION

Both parties to this Agreement shall at all times require the written consent or authorization of the parent/guardian or student, if 18 years of age or older, for the disclosure or access to educational records pursuant to FERPA or protected health information pursuant to the Health Information Portability and Accountability Act (HIPAA) regarding any student, unless an exception applies, and shall maintain the confidentiality of that information consistent with the state and federal law and regulations. For the purposes of FERPA, school officials with legitimate educational interests shall include both EAF and CA administrators, supervisors, teachers, support staff members (including health or medical staff and law enforcement unit personnel), board members, volunteers, contractors, or a student, parent or other volunteer assisting another school official in performing his or her tasks. A school official has a legitimate educational interest if the official needs to review an education record in order to fulfill his or her professional responsibility.

COMPENSATION/BILLING

CA shall compensate EAF for the professional services identified in Attachment A as set forth in Attachment B. The services identified in Attachment A, and the compensation for services set forth in Attachment B may be amended at any time in writing by mutual agreement by the parties to this Agreement.

EAF will submit a monthly statement of professional services rendered to CA for payment, which shall be approved at its next regularly scheduled meeting.

PROFESSIONAL SERVICES

The services rendered pursuant to this Agreement will be provided by individuals who are duly qualified to perform the services, or supervised by a qualified individual in accordance with applicable professional standards.

BACKGROUND CHECKS

All employees of both parties to this Agreement who come into contact with students shall have been subject to a criminal background check as required by Idaho Code Section 33-130 and policies of EAF, and will have been determined to not have a criminal background inconsistent with working with children.

INSURANCE AND LIABILITY

Both parties to this Agreement shall indemnify and hold harmless the other party from any liability, including, but not limited to, costs, expenses, and attorney fees, resulting from the performance of the services provided under this Agreement. Both parties shall maintain insurance as required by law.

ASSIGNMENT

This Agreement shall not be subject to assignment, in whole or in part, by either party to this Agreement, or by operation of law, so as to authorize any entity other than EAF, or its employees, to assume the duties subject to this Agreement without prior written consent.

SUCCESSORS AND ASSIGNS

This Agreement is binding upon, and inures to the benefit of, successors and permitted assigns to the Agreement.

AMENDMENT

This Agreement may be amended at any time with the prior written, mutual consent of both parties. Any and all amendments to this Agreement shall be in writing.

TERMINATION

This Agreement may be terminated, without cause, by either party, thirty (30) days after providing written notice of the intent to terminate to the other party.

Additionally, either party to this Agreement may immediately terminate this Agreement, upon written notice, in the event that funding for either CA's program or EAF's program is no longer available.

DEFAULT

Upon default by either party, the non-defaulting party may, upon written notice, cancel this Agreement immediately and may pursue any and all available legal and equitable remedies. The defaulting party shall be liable for any and all expenses that are incurred by the non-defaulting party as a result thereof, including, but not limited to, procuring substitute performance, legal fees, and other losses incurred due to the default.

TIME OF PERFORMANCE

Time is of the essence in this Agreement; therefore, all times for performance of the obligations, as stated herein, shall be strictly complied with by the parties.

NON-WAIVER BREACH

The failure of either party to this Agreement to insist upon strict performance of any of the terms of this Agreement, or to exercise any option herein conferred in any or all instances, shall not constitute a waiver or relinquishment of any such term, but the same shall be and remain in full force and effect, unless such waiver is evidenced by the prior written consent of EAF or CA

NON-DISCRIMINATION

The parties hereby agree that no person shall be excluded from, denied participation in, or otherwise subjected to discrimination on the grounds of race, color, creed, national origin, sex, age, or disability in performance of this Agreement.

GOVERNANCE

This Agreement shall be governed by the laws of the State of Idaho. Both parties to this Agreement shall, at all times, comply with and observe all federal, state, and local laws, regulations, and ordinances that are in effect and applicable during the period of this Agreement.

ATTORNEY FEES

If either party defaults in any manner, or fails to fulfill any or all provisions of this Agreement, and if the non-defaulting party hires an attorney to exercise its rights upon such default or failure, or if the parties are involved in any litigation, including any proceedings in bankruptcy, the prevailing party shall be entitled to recover reasonable attorney fees and costs from the other party. This paragraph shall be enforceable by the parties notwithstanding any rescission, forfeiture, or other termination of this Agreement.

SEVERABILITY

Any term or provision of this agreement that is invalid or unenforceable in any situation in any jurisdiction (1) will be deemed modified to reflect the intent of the parties, determined by reference to the invalid or unenforceable term or provision, to the greatest extent permissible; and (2) will not affect the validity or enforceability of the remaining terms and provisions of this Agreement, or the validity or enforceability of the offending term or provision in any other situation or jurisdiction.

CONSTRUCTION

This Agreement is to be construed as the joint and equal work product of each party, and may not be interpreted more or less favorably in respect to either party on account of its preparation or drafting.

COMPLETE STATEMENT OF TERMS

This Agreement constitutes the entire agreement between the parties hereto, and shall supersede all previous oral or written proposals, negotiations, commitments, and all other

communications between the parties. This Agreement may not be released, discharged, or modified except by an instrument in writing, signed by the duly authorized representatives of the parties.

IN WITNESS WHEREOF, the parties have executed this Agreement on this _____ day of _____ 20 .

CEO, Elevate Academy Foundation Inc. _____

Board Chair , Cardinal Academy, Inc. _____

Date Approved by Cardinal Academy, Inc. Board of Directors _____

ATTACHMENT A

Professional Services:

EAF agrees to provide the following professional services to CA

- a. Support the management transition process for CA's second year of operations;
- b. Provide comprehensive program design, including curriculum development and implementation, instructional oversight, the development, administration, and analysis of diagnostic assessments, and the oversight, measurement, and management of school quality;
- c. recommend facility threshold for lease to maintain proper budgeting;
- d. maintain a productive relationship with the Salvation Army and the Booth program;
- e. Provide a qualified director to oversee the provision of professional services;
- f. Recruit staff, and make personnel recommendations to the Board of Directors;
- g. Provide professional development training for teachers, administrators and staff;
- h. Prepare a budget for the Board of Directors to consider and provide monthly financial statements for the Board's review and approval;
- i. Provide payroll and bookkeeping services;
- j. Recommend an auditor and serve as a liaison with the auditor;
- k. Coordinate purchasing;
- l. Oversee the provision of special education services and accommodations pursuant to the Individuals with Disabilities Education Act and Section 504 of the Rehabilitation Act of 1973;
- m. Oversee the operations of CA and make recommendations to the Board of Directors, as appropriate, facility lease agreement, student transportation, policy development, and all other matters pertaining to operations;

- n. Recommend and manage benefits plans for CA employees selected by the Board of Directors;
- o. Provide human resource services and maintain CA employee files
- p. Facilitate CA's purchase and procurement of information technology equipment and services, and provide certain computer and information technology support to the school, including troubleshooting, website and network design, and completion of the E-Rate application;
- q. Complete required State, Federal and State Department of Education reports, including, but not limited to the CA's SDE annual financial report;
- r. Develop a comprehensive student recruitment strategy, and revisit is monthly to ensure enrollment targets are met;
- s. Provide marketing and advocacy for CA.
- t. Provide an annual report to the Board of Directors indicating the services provided to CA

ATTACHMENT B

Compensation for Professional Services:

- 1) CA shall pay EAF \$30,000 for transition of management services provided from April 2022 through August of 2022. This includes the transfer of management, recruit and recommend staff to Board of Directors for hiring, training of staff, and back office support.
- 2) CA shall pay \$80,000 at \$6666.66 per month payable on the last day of each month for ongoing professional services provided commencing July 1 of 2022, through June 30 of 2023 (12 months), as outlined in Attachment A.
- 3) EAF shall be authorized to access CA's accounts to make any and all payments for CA expenditures, except that all payments by CA to EAF must be approved by the CA Board of Directors prior to issuance.

Corporate Management of Charter Schools

Idaho Code requires new charter school petitions that propose management services to include the management services contract in the original application. It further requires that the authorizer “thoroughly evaluate” the contract and the services provider itself to ensure that taxpayer interests are protected, the governing board retains authority, and sufficient separation of duties is present.

Statute does not contemplate the authorizer’s role when a charter school governing board decides to engage in a management services contract after the school’s operations have begun. If the intent of the legislation is truly to protect taxpayer dollars from being unwittingly engaged in a poorly structured contract, that risk exists at any time a public charter school considers such action.

This is clearly an issue of autonomy vs. accountability. However, as management services contracts place varying levels of financial decision-making with the management company instead of the governing board the authorizer originally entrusted with this authority, legislation should be considered to provide for state level review of all charter school management services contracts before they can be executed.

Transparency and Due Process

Statute provides all potentially impacted school districts with the right to review any new petition for 4 weeks before the petition can be submitted to another authorizer. It also provides potentially impacted school districts with a 30-day notice of amendment when the amendment is likely to impact the district. However, this section of Idaho Code only identifies significant growth in the number of students served as a potentially impactful amendment. It does not expressly contemplate the potential impact that a charter school might have on a traditional district if it changes its model significantly after operations have begun.

It is conceivable that an amendment may be significant enough that the amendment is more appropriately considered as a new petition. Several states have enacted charter school “take-over” laws to address this issue specifically. These laws serve to draw the line between amending and starting over and provide for a clear path, with transparency and due process, for a failing school to be rescued by a successful management company.

NOTE: Should the Commission be interested in considering these issues in more depth, a detailed review of Idaho Code and an analysis of relevant laws in other states can be provided for further discussion as a future agenda item.

VI. NOTIFICATION OF FISCAL CONCERN

A. Bingham Academy

APPLICABLE STATUTE, RULE, OR POLICY

I.C. §33-5209C(3)

IPCSC Policy, Section VI.E

BACKGROUND

Pursuant to Idaho Code, if the IPCSC has reason to believe that a public charter school may not remain fiscally stable for the remainder of its performance certificate term, the IPCSC shall issue to the State Department of Education written notification of concern.

DISCUSSION

Bingham Academy's FY20 year-end fund balance was positive by \$206,428. The FY21 year-end fund balance increased to \$300,387. The school's debt service coverage ratio was 1.9 in FY20 and 1.8 in FY21. While the school failed to meet standard on these measures in previous years, it has met standard for two consecutive years and 3rd quarter reports indicate that the school is continuing in a positive direction.

In 2019, when the school was struggling most, it ended the fiscal year with only 2 days' cash on hand. This was a primary factor in establishing the current notification of fiscal concern. In 2020, cash on hand rose to 45 days. In 2021, it dropped slightly to 41 days. Based on 3rd quarter data for FY22, the school is projecting to end the fiscal year with approximately 50 days' cash on hand. The school is currently meeting standard and is working consistently toward the larger goal of 60 days' cash on hand.

SPEAKER

Board Chair, Dan Cravens;
School Principal, Chad Harris;
Business Manager, Steve Bailey

IMPACT

If the IPCSC maintains the notification of fiscal concern the school and the SDE will be notified in writing, and the SDE will proceed with a modified distribution of the school's financial disbursements.

If the IPCSC lifts the notification of fiscal concern the school and the SDE will be notified in writing and the school will receive financial distributions for FY23 on the regular schedule, with 75% of the annual revenue projection issued by Nov. 15th.

STAFF COMMENTS AND RECOMMENDATIONS

Staff recommends that the IPCSC lift the notification of fiscal concern.

COMMISSION ACTION

A motion to lift the notification of fiscal concern for Bingham Academy as of June 30, 2022; OR

A motion to maintain the notification of fiscal concern for Bingham Academy through fiscal year 2023.

ACCOUNT	DESCRIPTION	YTD Activity
GENERAL FUND		
100-320000-000-000-0	BUDGET BALANCE CARRY FORWARD	0.00
100-415000-000-000-0	EARNINGS ON INVESTMENT - GEN FUND	169.30CR
100-419200-000-000-0	CONTRIBUTIONS/GRANTS RECEIVED	8,817.08CR
100-419210-000-000-0	STEM SCHOOL DESIGNATION AWARD	0.00
100-417900-000-000-0	OTHER STUDENT REVENUE	0.00
100-419900-000-000-0	OTHER LOCAL REVENUE	1,311.75CR
100-419901-000-000-0	DRIVER'S ED	3,850.00CR
100-431100-000-000-0	BASE STATE SUPPORT PROGRAM	1,102,728.66CR
100-431200-000-000-0	TRANSPORTATION SUPPORT	0.00
100-431800-000-000-0	STATE BENEFIT APPORTIONMENT	0.00
100-431000-200-000-0	LEADERSHIP PREMIUMS	0.00
100-431900-000-000-0	PAY FOR PERFORMANCE REVENUE	0.00
100-437000-000-000-0	IDAHO STATE LOTTERY REVENUE	7,469.00CR
100-439000-000-000-0	OTHER STATE REVENUE	81,202.00CR
100-441000-000-000-0	State Building Fund	0.00
100-442000-000-000-0	INDIRECT FEDERAL REVENUE	0.00
100-445000-000-000-0	Reimbursed Wages	0.00
100-451000-000-000-0	LOAN PROCEEDS	0.00
100-460000-000-000-0	TRANSFERS FROM OTHER FUNDS	0.00
****TOTAL REVENUES		1,205,547.79CR
		=====
100-515100-000-000-0	SALARIES - SECONDARY SCHOOL	498,674.19
100-515103-000-000-0	SUBSTITUTES	5,307.46
100-515115-000-000-0	NON CERTIFIED SALARY	0.00
100-515150-000-000-0	Salaries-CLASSIFIED	0.00
100-515175-000-000-0	LEADERSHIP PREMIUMS	0.00
100-515275-000-000-0	LEADERSHIP PREMIUMS BENEFITS	0.00
100-515200-000-000-0	EMPLOYEE BENEFITS - SECON. SCHOOL	147,523.88
100-515201-000-000-0	SECOND BENS NON RETIRE,FICA,MED	0.00
100-515250-000-000-0	Benefits-Pay for Performance	0.00
100-515203-000-000-0	SUBSTITUTE BENEFITS	0.00
100-515300-000-000-0	TRAVEL/PURCHASED SERVICE-Secondary	1,267.50
100-515301-000-000-0	SECONDARY PER. SER. SUBSTITUTES	0.00
100-515302-000-000-0	SECONDARY PUR. SER. DEV-STAFF	0.00
100-515310-000-000-0	GRADUATION	606.12
100-515313-000-000-0	PROFESSIONAL DEVELOPMENT	0.00
100-515400-000-000-0	SUPPLIES - SECON SCHOOL	1,898.83
100-515410-000-000-0	SUPPLIES -INTERCEPT/TEACHERS AIDES	0.00
100-515413-000-000-0	GRANT FUNDS - EPIC GAMES 20-21	0.00
100-515415-000-000-0	STEM DESIGNATION EXPENSES	0.00
100-515411-000-000-0	Incentives	0.00
100-515460-000-000-0	SECONDARY FUNDRAISING	0.00
100-515450-000-000-0	SECONDARY CURRICULUM SUPPLIES	15,450.05
100-515490-000-000-0	Expensed Furniture & Equipment	6,989.19
100-515500-000-000-0	EQUIPMENT - SECONDARY SCHOOL	0.00
**TOTAL SECONDARY SCHOOL PROGRAM		677,717.22
100-521100-000-000-0	SALARIES - EXCEPTIONAL CHILD PROG	17,000.00
100-521200-000-000-0	EMPLOYEE BENEFITS - EXCEPT CHILD	0.00
100-521300-000-000-0	TRAVEL/PURCH SERVICES-EXCEP CHILD	32.50
100-521400-000-000-0	SUPPLIES - EXCEPTIONAL CHILD PROG	0.00
100-521500-000-000-0	EQUIPMENT - EXCEPT. CHILD PROGRAM	0.00
**TOTAL EXCEPTIONAL CHILD PROGRAM		17,032.50
100-524400-000-000-0	SUPPLIES - GIFTED AND TALENTED	0.00
*** TOTAL GIFTED AND TALENTED		0.00
100-532300-000-000-0	TRAVEL/PURCH SERVICES - ACTIVITY	0.00
100-532400-000-000-0	SUPPLIES - ACTIVITY PROGRAM	0.00
**TOTAL ACTIVITY PROGRAM		0.00
100-611300-000-000-0	PURCHASED SERVICE - GUID/HEALTH	0.00
100-611400-000-000-0	SUPPLIES - GUIDANCE/HEALTH	0.00
**TOTAL GUIDANCE/HEALTH PROGRAM		0.00
100-616300-000-000-0	Special Services Purchase Service	0.00
**TOTAL SPECIAL SERVICES		0.00
100-621300-000-000-0	PURCHASED SERVICES - INST. IMPROVE	0.00
100-621400-000-000-0	SUPPLIES - INSTRUCTION IMPROVEMENT	0.00
		=====

ACCOUNT	DESCRIPTION	YTD Activity
	**TOTAL INSTRUCTION IMPROVEMENT	0.00
100-622300-000-000-0	PURCHASED SERVICES - MEDIA/LIB	0.00
100-622400-000-000-0	BOOKS/SUPPLIES - MEDIA/LIBRARY	0.00
100-622410-000-000-0	Scholastic Book Order	0.00
100-622500-000-000-0	EDUCATIONAL MEDIA PROGRAM	0.00
	**TOTAL MEDIA/LIBRARY PROGRAM	0.00
100-623400-000-000-0	INSTRUCT-RELATED TECH PROG	0.00
	**TOTAL TECHNOLOGY RELATED	0.00
100-631300-000-000-0	LEGAL FEES SCHOOL BOARD	2,477.00
100-631313-000-000-0	BOARD TRAINING	0.00
	**BOARD OF EDUCATION EXPENSE	2,477.00
100-632311-000-000-0	AUTHORIZOR FEE	4,486.15
100-632312-000-000-0	BANK SERVICE CHARGES	20.00
100-632400-000-000-0	SUPPLIES - DISTRICT ADMIN. PROGRAM	0.00
	**TOTAL SECONDARY SCHOOL PROGRAM	4,506.15
100-641100-000-000-0	SALARIES - SCHOOL ADMINISTRATION	179,041.19
100-641110-000-000-0	Admin Salaries Payable	18.68
100-641200-000-000-0	BENEFITS - SCHOOL ADMINISTRATION	0.00
100-641201-000-000-0	ADMIN BENS NON RETIRE, FICA, MED	0.00
100-641300-000-000-0	PURCHASED SERVICES	3,433.12
100-641313-000-000-0	PROFESSIONAL DEVELOPMENT	50.00
100-641350-000-000-0	PURCHASE SERVICES IT SUPPORT	0.00
100-641400-000-000-0	SUPPLIES - SCHOOL ADMINISTRATION	17,851.74
100-641500-000-000-0	EQUIPMENT - SCHOOL ADMINISTRATION	725.73
100-641700-000-000-0	PROPERTY/LIABILITY INSURANCE	11,058.00
	**TOTAL SCHOOL ADMINISTRATION	212,178.46
100-651100-000-000-0	SALARIES - BUSINESS SUPPORT	30,965.00
100-651110-000-000-0	Business Salaries Payable	0.00
100-651200-000-000-0	BENFITS - BUSINESS OPERATIONS	0.00
100-651201-000-000-0	BUSINESS BENS NON RETIRE,FICA,MED	0.00
100-651300-000-000-0	PURCHASED SERVICES - ACCOUNTING	7,115.92
100-651313-000-000-0	PROFESSIONAL DEVELOPMENT	0.00
100-651400-000-000-0	SUPPLIES - BUSINESS OPERATION	1,237.88
100-651500-000-000-0	EQUIPMENT - BUSINESS OPERATION	0.00
100-651700-000-000-0	LIAB. INS. - BUSINESS OPERERATION	0.00
	**TOTAL BUSINESS OPERATION	39,318.80
100-661100-000-000-0	SALARIES - BUILDING CARE	6,053.01
100-661200-000-000-0	BENEFITS - BUILDING CARE	0.00
100-661201-000-000-0	BUILD BENEFITS NON RETIRE,FICA,MED	0.00
100-661300-000-000-0	PURCHASED SERVICE - BUILDING CARE	1,087.81
100-661310-000-000-0	UTILITIES - ELECTRICITY	22,367.64
100-661312-000-000-0	UTILITIES - WATER AND SEWER	3,615.04
100-661321-000-000-0	BUILDING RENTAL	71,723.13
100-661400-000-000-0	SUPPLIES - BUILDING CARE	620.33
100-661500-000-000-0	CAPITAL OBJECTS	0.00
100-664300-000-000-0	PURCHASE SERVICE - BUILDINGS	3,989.34
100-664310-000-000-0	PURCHASE SERVICE - UTILITIES	29.21
100-664400-000-000-0	SUPPLIES - BUILDING	894.02
100-665300-000-000-0	MAINTENANCE - GROUNDS PURCHASES	0.00
100-665400-000-000-0	Maintenance - Grounds Supplies	0.00
100-667300-000-000-0	SECURITY PROGRAM	0.00
100-667400-000-000-0	SUPPLIES - SECURITY PROGRAM	0.00
100-667500-000-000-0	EQUIPMENT - SECURITY PROGRAM	0.00
	**TOTAL BUILDINGS CARE/MAINTENANCE	110,379.53
100-681100-000-000-0	PUPIL - TO SCHOOL TRANS - SALARIES	120,184.93
100-681200-000-000-0	PUPIL - TO SCHOOL TRANS - BENEFITS	0.00
100-681201-000-000-0	TRANS BENS NON RETIRE, FICA,MED	0.00
100-681210-050-000-0	PERSI - 50%	0.00
100-681210-085-000-0	PERSI - 85%	0.00
100-681220-050-000-0	FICA - 50%	0.00
100-681220-085-000-0	FICA - 85%	0.00
100-681300-000-000-0	TOTAL PURCHASED SERVICES	1,904.98
100-681335-000-000-0	CONTRACTED REPAIRS	0.00
100-681338-000-000-0	CONTRACTED REPAIRS (BUS SPECIFIC)	300.00
100-681345-000-000-0	UTILITIES IN BUS GARAGE	108.30
100-681365-000-000-0	TRAINING AND TRAVEL EXPENSES	526.53
100-681368-000-000-0	TRAINING & TRAVEL EXPENSES SDE	205.16

ACCOUNT	DESCRIPTION	YTD Activty
100-681350-000-000-0	Purchase Service Travel	0.00
100-681310-000-000-0	Transportation For Fuel Cars	162.96
100-681400-000-000-0	PUPIL - TO SCHOOL TRANS. SUPPLIES	867.09
100-681410-000-000-0	Fuel Yellow Buses	43,364.82
100-681420-000-000-0	OIL & LUBRICANTS	119.76
100-681420-050-000-0	OIL FOR BUSES - 50%	0.00
100-681420-085-000-0	OIL FOR BUSES 85%	0.00
100-681428-000-000-0	RADIO REPAIR	0.00
100-681428-010-000-0	RADIO SERVICE UTILITY	3,947.35
100-681433-000-000-0	BUS CLEANING SUPPLIES	0.00
100-681435-000-000-0	SHOP MATERIALS & PARTS	259.74
100-681438-000-000-0	BUS MATERIALA & PARTS	4,864.56
100-681470-000-000-0	NR TOOLS & EQUIPMENT	0.00
100-681478-000-000-0	HAND TOOLS	537.11
100-681500-000-000-0	CAPTIAL OBJECTS	21,635.50
100-681700-000-000-0	TOTAL INSURANCE	0.00
100-681720-000-000-0	LIABILITY COVERAGE ON BUSES	0.00
100-683410-000-000-0	FUEL FOR SCHOOL CAR	187.35
100-683420-000-000-0	OIL & LUBRICANTS FOR CARS	0.00
100-683435-000-000-0	SHOP MATERIALS & PARTS FOR CARS	0.00
100-683500-000-000-0	CAPITOL OBJECTS	0.00

	**TOTAL TRANS PROGRAM	199,176.14
100-810800-000-000-0	transfer to other Funds	0.00
100-911600-000-000-0	DEBT SERVICE PRINCIPAL	17,747.90
100-912600-000-000-0	Debt Service-Interest	495.83
100-950000-000-000-0	CONTINGENCY RESERVE	0.00

	****TOTAL EXPENDITURES	1,281,029.53
		=====

ACCOUNT	DESCRIPTION	YTD Activity
	FUND BALANCE - GENERAL FUND	75,481.74
	ALBERTSON FOUNDATION	
230-320000-000-000-0	BUDGET BALANCE CARRYFORWARD	0.00
230-419200-000-000-0	JA & K ALBERTSON FOUNDATION GRANT	0.00
	****TOTAL REVENUES	0.00
		=====
230-515100-000-000-0	Salaries-Albertson's Grant	0.00
230-515200-000-000-0	Benefits - Albertson's Grant	0.00
230-515300-000-000-0	PURCHASE SERVICE - ALBERTSON	0.00
230-515400-000-000-0	Secondary - supplies-Albertson's	0.00
230-515500-000-000-0	SECONDARY EQUIPMENT - ALBERTSON	0.00
230-515600-000-000-0	Building Costs-Albertson's Grant	0.00
	****TOTAL EXPENDITURES	0.00
		=====

ACCOUNT	DESCRIPTION	YTD Activity
241-417400-000-000-0	DRIVERS ED REVENUE	0.00
241-515400-000-000-0	DRIVERS ED FUEL	0.00
241-515415-000-000-0	DRIVERS ED CAR MAINTENANCE	0.00
	PTE GRANT	
243-320000-000-000-0	Budget Balance Carryforward	0.00
243-445600-000-000-0	Revenue PTE - pre engineering	0.00
243-445610-000-000-0	CTE - HEALTH SCIENCE	0.00
	****TOTAL REVENUES	0.00
	=====	
243-515300-000-000-0	PURCHASE SERVICES/TRAVEL	0.00
243-515400-000-000-0	Secondary Supplies PTE	3,381.06
243-515500-000-000-0	Secondary Equipment PTE	0.00
	****TOTAL EXPENDITURES	3,381.06
	TECHNOLOGY FUND	
245-320000-100-000-0	BUDGET BALANCE CARRY FORWARD	0.00
245-439000-000-000-0	OTHER STATE REVENUE	30,588.00CR
	****TOTAL REVENUES	30,588.00CR
	=====	
245-515300-000-000-0	Secondary Purchase Service	4,008.61
245-515305-000-000-0	INTERNET	2,689.50
245-515310-000-000-0	IT SUPPORT SERVICES	14,154.17
245-515315-000-000-0	LAPTOP LEASING	8,000.00
245-515400-000-000-0	SECONDAR SCHOOL SUPPLIES-TECH FUND	0.00
245-515500-000-000-0	EQUIPMENT SECONDARY	0.00
	****TOTAL EXPENDITURES	28,852.28
	=====	
	SUBSTANCE ABUSE	
246-320000-000-000-0	BUDGET BALANCE CARRY FORWARD	0.00
246-320002-000-000-0	OTHER STATE REV-SUBSTANCE ABUSE	0.00
246-439000-000-000-0	SUBSTANCE ABUSE - OTHER STATE REVE	0.00
	****TOTAL REVENUES	0.00
246-515100-000-000-0	SALARIES-SECONDARY SCHOOL	0.00
246-515200-000-000-0	BENEFITS-SECONDARY SCHOOL	0.00
246-515300-000-000-0	SUPPLIES-SECONDARY SCHOOL	0.00
	****TOTAL EXPENDITURES	0.00
	=====	
	T I T L E I F U N D	
250-515400-000-000-0	ESSER 3 SUPPLIES AND EQUIPMENT	8,676.13
251-320000-000-000-0	BUDGET BALANCE CARRY FORWARD	0.00
251-445100-000-000-0	REVENUE - TITLE I	43,178.31CR
	****TOTAL REVENUES	34,502.18CR
	=====	
251-515100-000-000-0	SALARIES - TITLE I	32,127.00
251-515200-000-000-0	BENEFITS - TITLE I	5,632.32
251-515201-000-000-0	BENEFITS PAY NON FICA MC RETIREMEN	0.00
251-515300-000-000-0	PURCHASED SERVICES - TITLE I	0.00
251-515400-000-000-0	SUPPLIES - TITLE I	0.00
251-512500-000-000-0	EQUIPMENT - TITLE I	0.00
	****TOTAL EXPENDITURES	37,759.32
	=====	

ACCOUNT	DESCRIPTION	YTD Activity
254-445600-000-000-0	REVENUE ESSER 2	21,609.00CR
261-320000-000-000-0	BALANCE CARRIED FORWARD - TITLE 4	0.00
261-445600-000-000-0	REVENUE TITLE IV STUDENT SUPPORT	10,000.00CR
	****TOTAL REVENUES	10,000.00CR
		=====
261-515100-000-000-0	SALARIES TITLE 4 - STUDENT SUPPORT	0.00
261-515200-000-000-0	BENEFITS - TITLE 4 STUDENT SUPPORT	0.00
	****TOTAL EXPENDITURES	0.00
		=====
	IDEA PART B FUND	
257-320000-000-000-0	BUDGET BALANCE CARRY FORWARD	0.00
257-445600-000-000-0	REVENUE - IDEA PART B	18,300.00CR
	****TOTAL REVENUES	18,300.00CR
		=====
257-521100-000-000-0	SALARIES - IDEA PART B FUND	16,546.00
257-521200-000-000-0	BENEFITS - IDEA PART B	0.00
257-515201-000-000-0	Benefits IDEA Non FICA/MC Retire	0.00
257-521300-000-000-0	PURCHASED SERVICES - IDEA PART B	0.00
257-521400-000-000-0	SUPPLIES - IDEA PART B	0.00
257-521500-000-000-0	EQUIPMENT - IDEA PART B	0.00
	****TOTAL EXPENDITURES	16,546.00
		=====

ACCOUNT	DESCRIPTION	YTD Activity
	RURAL GRANT	
262-320000-000-000-0	Budget Balance Carry Forward	0.00
262-445100-000-000-0	Rural Grant Revenue	0.00

	****TOTAL REVENUES	0.00
		=====
262-515100-000-000-0	Salaries - Rural Grant	0.00
262-515200-000-000-0	Benefits - Rural Grant	0.00
262-515201-000-000-0	Benefits Rural Grant Non RICA/MC R	0.00
262-515300-000-000-0	Purchase Service	0.00
	****TOTAL EXPENDITURES	0.00

ACCOUNT	DESCRIPTION	YTD Activity
271-320000-000-000-0	BUDGET BALANCE CARRY FORWARD	0.00
271-445100-000-000-0	REVENUE - TEACHER QUALITY	0.00
	****TOTAL REVENUES	0.00
		=====
271-515100-000-000-0	Salaries Secondary Title II	0.00
271-515200-000-000-0	Benefits Secondary Title II	0.00
271-515201-000-000-0	TITLE II BEN PAYABLE NON FICA/MC R	0.00
271-515300-000-000-0	Purchased Services Title II	0.00
271-515380-000-000-0	Travel Expenses Title II	0.00
	****TOTAL EXPENDITURES	0.00
		=====

ACCOUNT	DESCRIPTION	YTD Activity
	DRUG FREE FUND	
273-320000-000-000-0	Budget Balance Carry Forward	0.00
273-445100-000-000-0	Revenues	0.00

	****TOTAL REVENUES	0.00
		=====
273-512300-000-000-0	Purchase Services	0.00
273-512400-000-000-0	Supplies	0.00

	****TOTAL EXPENDITURES	0.00
		=====

ACCOUNT	DESCRIPTION	YTD Activity
274-445100-000-000-0	REVENUE - CORONA VIRUS RELIEF	0.00
	CSP GRANT	
274-621400-000-000-0	INSTRUCT IMPROVEMENT - CORONA FUND	0.00
274-623300-000-000-0	TECH SERVICES IT - CORONA RELIEF	0.00
274-623400-000-000-0	TECH SUPPLIES - CORONA RELIEF FUND	0.00
274-661100-000-000-0	BUILDING CARE SALARY - CORONA FUND	0.00
	**TOTAL BUSINESS OPERATION	0.00
288-320000-000-000-0	BUDGET BALANCE CARRY FORWARD	0.00
288-443000-000-000-0	CSP GRANT REVENUE	0.00
	****TOTAL REVENUES	0.00
		=====
288-515100-000-000-0	Salaries-CSP Grant	0.00
288-515200-000-000-0	Benefits-CSP Grant	0.00
288-515300-000-000-0	Supplies-CSP Grant	0.00
288-515350-000-000-0	Purchased Service/Travel-CSP Grant	0.00
288-515400-000-000-0	Purchased Service/Contractual -CSP	0.00
288-515500-000-000-0	Equipment-CSP Grant	0.00
	****TOTAL EXPENDITURES	0.00
		=====
	ISEE GRANT	
298-320000-000-000-0	**No Such Acct**	0.00
298-419200-000-000-0	**No Such Acct**	0.00
	****TOTAL REVENUES	0.00
		=====
298-515400-000-000-0	**No Such Acct**	0.00
298-515500-000-000-0	**No Such Acct**	0.00
298-621300-000-000-0	**No Such Acct**	0.00
	****TOTAL EXPENDITURES	0.00
		=====
	PLANT FACILITIES	
420-320000-000-000-0	BUDGET BAL. CARRYFORWARD	0.00
420-419100-000-000-0	Rentals	0.00
420-439000-000-000-0	LOTTERY REVENUE	0.00
420-453000-000-000-0	Sale of Fixed Assets	0.00
420-460000-000-000-0	Transfer from other Funds	0.00
	****TOTAL REVENUES	0.00
		=====
420-641000-000-000-0	EXPENDITURES	0.00
420-664500-000-000-0	BUILDING MAINTENANCE	0.00
420-810530-000-000-0	New Construction	0.00
420-910610-000-000-0	Principle	0.00
420-910620-000-000-0	Interest	0.00
420-641300-000-000-0	Plant Facility Bld Pur Serv	0.00
	****TOTAL EXPENDITURES	0.00
		=====

VI. NOTIFICATION OF FISCAL CONCERN

B. Peace Valley Charter School

APPLICABLE STATUTE, RULE, OR POLICY

I.C. §33-5209C(3)
IPCSC Policy, Section VI.E

BACKGROUND

Pursuant to Idaho Code, if the IPCSC has reason to believe that a public charter school may not remain fiscally stable for the remainder of its performance certificate term, the IPCSC shall issue to the State Department of Education written notification of concern.

DISCUSSION

A notification of fiscal concern was first put in place for Peace Valley Charter School in June of 2021. The decision was based on the school's engagement in a facility lease with unfavorable terms and the fact that the school only achieved 81% of the revenue it budgeted for during the 2020-2021 school year.

During the 2021-22 school year the school achieved 100% of its projected enrollment. Separately, a formal letter from the ISBA was issued to the school in May of 2022 stating that payment for services rendered had not been made, and there is some concern about the general functionality of the leadership structure. However, while the lease remains concerning, it does appear that at least one bill was not paid on time, and the school does not appear to be taking advantage of ESSR funds to the extent possible, the school is likely to be able to service its current debt based on current enrollment through the end of its current performance certificate term (2023).

SPEAKER

Andrew Ross, Principal
Tiffini LeJeune, Board Treasurer
Amy Thorn, Board Member

IMPACT

If the IPCSC maintains the notification of fiscal concern the school and the SDE will be notified in writing, and the SDE will proceed with a modified distribution of the school's financial disbursements.

If the IPCSC lifts the notification of fiscal concern the school and the SDE will be notified in writing and the school will receive financial distributions for FY23 on the regular schedule, with 75% of the annual revenue projection issued by Nov. 15th.

STAFF COMMENTS AND RECOMMENDATIONS

While the school's governing board and leadership team are struggling to operate effectively, the school is likely to remain fiscally viable for at least one year (the remainder of its performance certificate term).

Short-term, the school appears viable. Long-term, financial viability is concerning, but more appropriately address as part of the renewal process.

Staff recommends that the IPCSC lift the notification of fiscal concern.

COMMISSION ACTION

A motion to lift the notification of fiscal concern for Peace Valley Charter School as of June 30, 2022; OR

A motion to maintain the notification of fiscal concern for Peace Valley Charter School through fiscal year 2023.

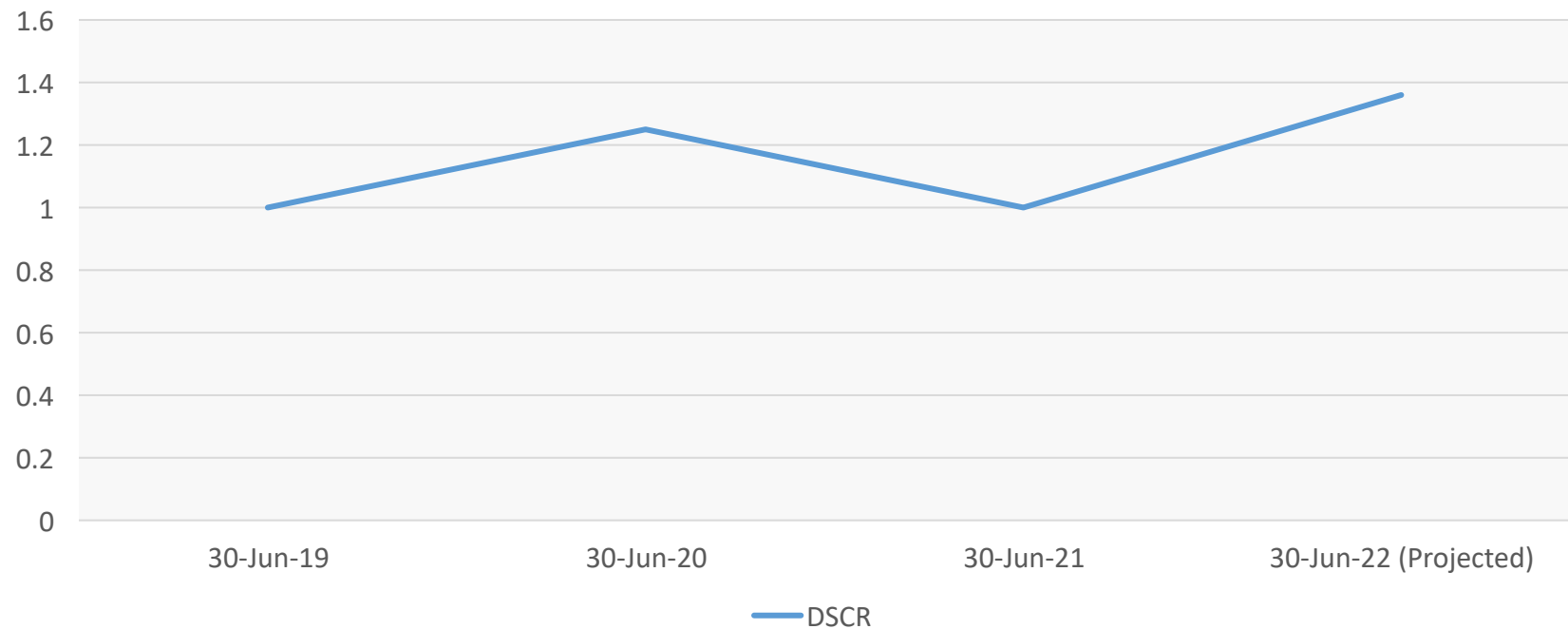
Data to Support the Lifting of the Fiscal Notification of Concern





Debt Service Coverage Ratio

June 30, 2019	June 30, 2020	June 30, 2021	June 30, 2022 (Projected)
1.00	1.25	1.0	1.36





Debt Service Coverage Ratio Cont.

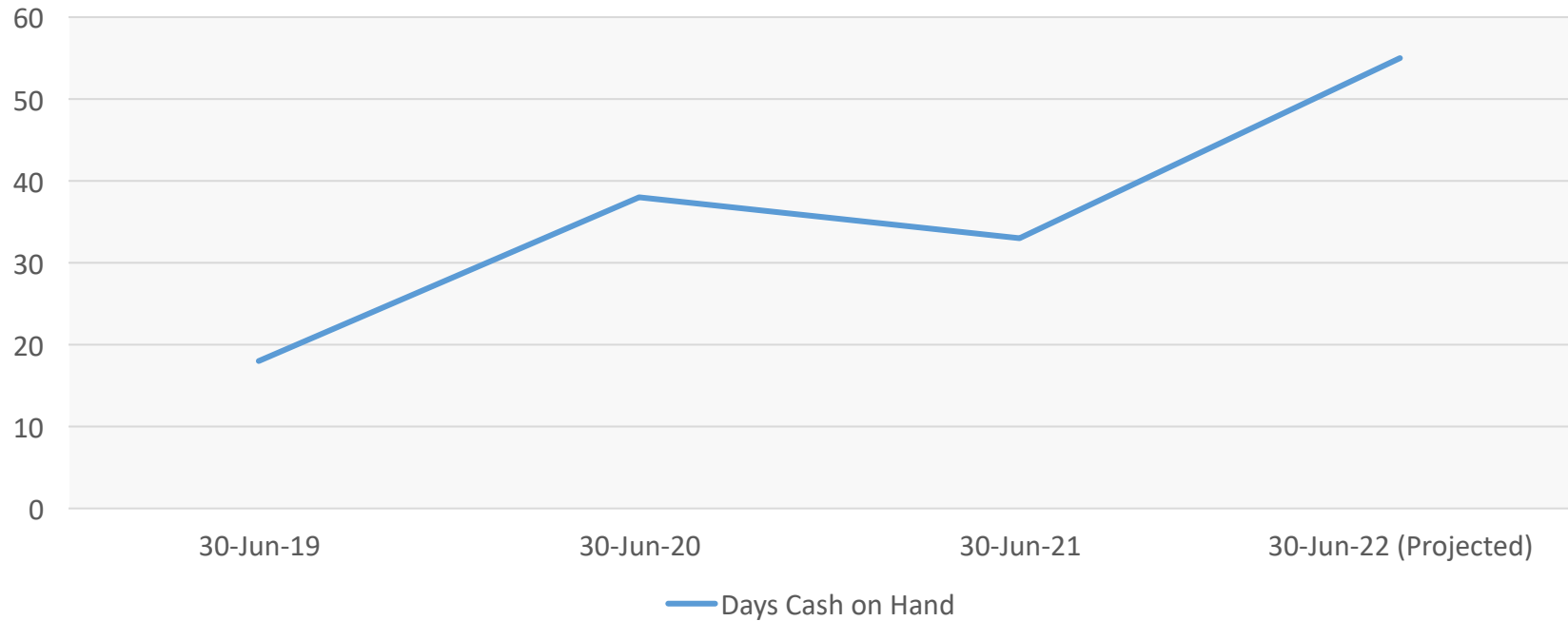
June 30, 2019	June 30, 2020	June 30, 2021	June 30, 2022 (Projected)
1.00	1.25	1.0	1.36

Peace Valley Charter School currently exceeds the Debt Service Coverage Ratio standard of 1.10, and reviews this ratio consistently as a finance committee as well as a board of directors.



Days Cash on Hand

June 30, 2019	June 30, 2020	June 30, 2021	June 30, 2022 (Projected)
18	38	33	55





Days Cash on Hand Cont.

June 30, 2019	June 30, 2020	June 30, 2021	June 30, 2022 (Projected)
18	38	33	55

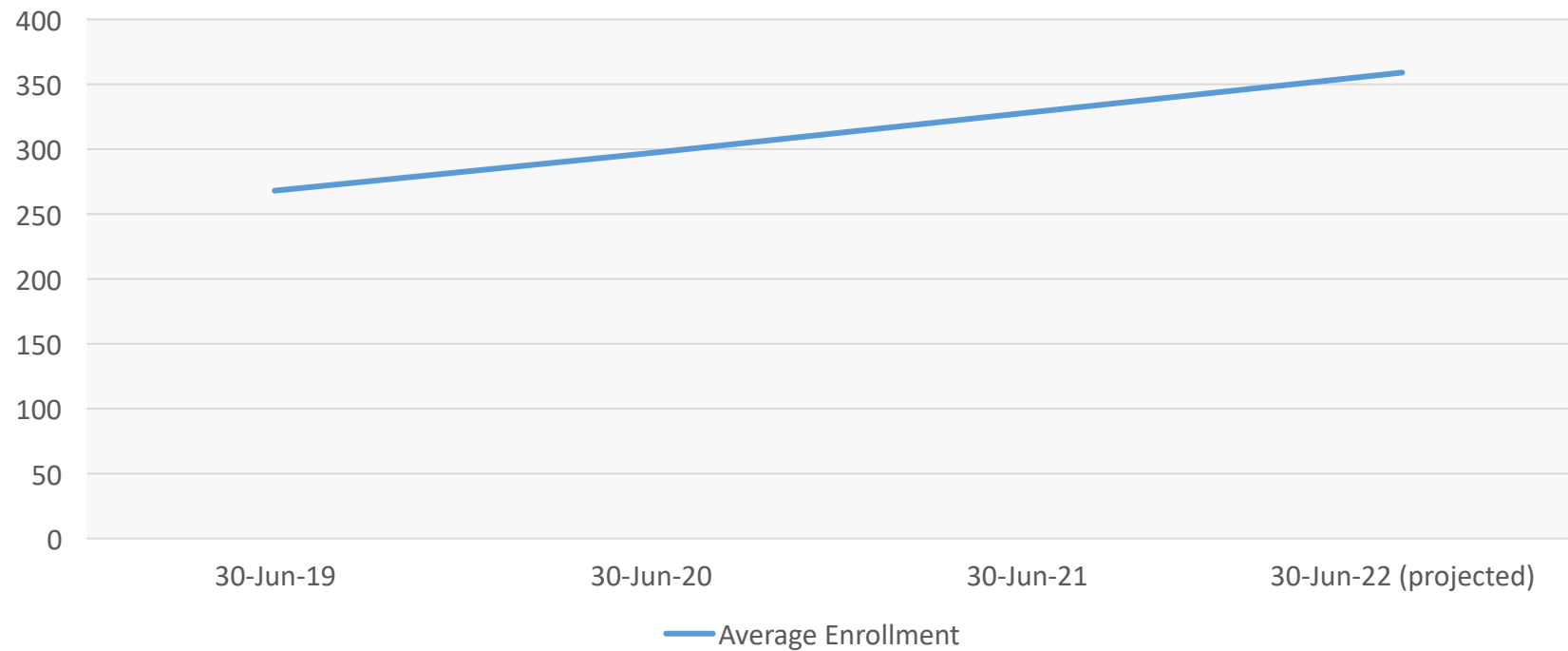
Peace Valley Charter School currently meets the Days Cash on Hand Ratio standard of 30-60 days, and reviews this ratio consistently as a finance committee as well as a board of directors.

The projected cash balance sheet has grown from \$90,519 (2019 audited) to \$434,163 (2022 projected).



Average Enrollment

6/30/2019	6/30/2020	6/30/2021	6/30/2022 (Projected)
268	297	328	359





Average Enrollment Cont.

6/30/2019	6/30/2020	6/30/2021	6/30/2022 (Projected)
268	297	328	359

Peace Valley Charter School currently meets the Enrollment Variance standard of 95% or above, and reviews this ratio consistently as a finance committee as well as a board of directors. It is also reviewed with the business management team and the registrar.

The budgeted enrollment projection was 360 students for FY22. That puts PVCS at a 99.7% Enrollment Variance.



On June 11, 2020, the Idaho Public Charter School Commission issued a letter of fiscal concern for PVCS to The State Department of Education, Division of School Finance. Based upon the data the Charter Commission had received at that time, this course of action was fully reasonable, justifiable, and prudent. Over the last two years, PVCS has become more financially solvent as indicated by the metrics reviewed in this presentation. It has maintained its administration since December 2019. Additionally, the finance committee has added more members that bring strong financial assets to the team.

The school's financial rating has moved from "remediation" to "honor" within the IPCSC Annual Report.

Taking into consideration this information, PVCS is formally requesting that the Charter Commission lift the notification of fiscal concern starting in FY23.

	Audited 06/30/2019 Balance Sheet	Audited 06/30/2020 Balance Sheet
Assets		
Cash	\$ 90,519	\$ 200,879
Receivables		
Local	\$ 719	\$ 2,091
State	\$ 40,697	\$ 43,906
Federal	\$ 32,024	\$ 16,949
Due from Other Funds	\$ 32,024	\$ 8,187
Prepaid Expenses	\$ 2,106	\$ 13,651
Total Assets	<u>\$ 198,089</u>	<u>\$ 285,663</u>
Liabilities		
Accounts Payable	\$ 20,888	\$ 32,804
Due to Other Funds	\$ 32,024	\$ 8,187
Salaries/Benefits Payable	\$ 143,550	\$ 145,336
Unspent Grant Allocation	\$ -	\$ 8,762
Total Liabilities	<u>\$ 196,462</u>	<u>\$ 195,089</u>
Fund Balances		
Restricted		
Special Programs	\$ -	\$ 16,444
Nonspendable	\$ 2,106	\$ 13,651
Unassigned	\$ (479)	\$ 60,479
Total Fund Balances	<u>\$ 1,627</u>	<u>\$ 90,574</u>
Total Liabilities & Fund Balances	<u>\$ 198,089</u>	<u>\$ 285,663</u>

	06/30/2019 Income Statement	06/30/2020 Income Statement
Revenues		
Local	\$ 296,722	\$ 126,571
State	\$ 1,471,476	\$ 1,692,741
Federal	\$ 32,024	\$ 226,036
Total Revenues	<u>\$ 1,800,222</u>	<u>\$ 2,045,348</u>
Expenditures		
Instructional Programs	\$ 890,649	\$ 1,089,308
Support Services Programs	\$ 907,236	\$ 866,633
Non-Instrucational Programs	\$ 710	\$ 460
Total Expenditures	<u>\$ 1,798,595</u>	<u>\$ 1,956,401</u>
Over Expenditures	<u>\$ 1,627</u>	<u>\$ 88,947</u>
Other Financing Sources	<u>\$ -</u>	<u>\$ -</u>
Net Change in Fund Balances	<u>\$ 1,627</u>	<u>\$ 88,947</u>
Fund Balance Beginning	<u>\$ -</u>	<u>\$ 1,627</u>

Fund Balance Ending	<u>\$ 1,627</u>	<u>\$ 90,574</u>
----------------------------	-----------------	------------------

	06/30/2019	06/30/2020
Ratios		
DSCR	1.00	1.25
Days Cash	18	38
Average Enrollment	268	297

320 budgeted	2months rent forbearance 360 budgeted enrollment pandemic funds
--------------	---

Audited 06/30/2021 Balance Sheet	Projected 06/30/2022 Balance Sheet
\$ 220,659	\$ 434,163
\$ 3,554	\$ -
\$ 165,313	\$ 6,552
\$ 130,445	\$ 132,375
\$ 14,512	\$ -
\$ -	\$ 7,000
<u>\$ 534,483</u>	<u>\$ 580,090</u>
\$ 83	\$ 26,000
\$ 14,512	\$ -
\$ 168,083	\$ 218,767
\$ 110,477	\$ 284,168
<u>\$ 293,155</u>	<u>\$ 528,935</u>
\$ 35,892	\$ 13,894
\$ -	\$ -
\$ 205,436	\$ 37,261
<u>\$ 241,328</u>	<u>\$ 51,155</u>
<u>\$ 534,483</u>	<u>\$ 580,090</u>
06/30/2021 Income Statement	Projected 06/30/2022 Income Statement
\$ 97,195	\$ 129,656
\$ 1,977,522	\$ 2,183,603
\$ 353,844	\$ 426,760
<u>\$ 2,428,561</u>	<u>\$ 2,740,019</u>
\$ 1,358,208	\$ 1,608,783
\$ 1,066,196	\$ 1,266,928
\$ 3,403	\$ 804
<u>\$ 2,427,807</u>	<u>\$ 2,876,515</u>
\$ 754	\$ (136,496)
\$ 150,000	\$ 350,000
\$ 150,754	\$ 213,504
\$ 90,574	\$ 241,328

<u>\$</u>	<u>241,328</u>	<u>\$</u>	<u>454,832</u>
06/30/2021		Projected 06/30/2022	
	1.00		1.36
	33		55
	328		359

rent reduction
359 budgeted enrollment
pandemic funds
PPP/SBA

rent reduction
360 budgeted enrollment
pandemic funds
SBA



Annual Performance Report 2021

Peace Valley Charter School

Mission Statement: To provide a developmentally appropriate, arts and nature-based education, nurturing children's innate creativity and inspiring them to become lifelong learners who are mindful, active, and engaged global citizens.

Chair/President

Eric McDonald

Secretary

Administrator

Andrew Ross

Business Manager

Matthew Lovell

School Location

1845 S Federal Way Boise

School Phone

208-205-8818

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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 includes a framework describing the expectations the school must meet in order to earn a next operational term. It also requires that charter school authorizer's complete performance reports for the schools they oversee each year. The annual performance report serves the following purposes:

1. To provide transparent information about charter school quality to the public;
2. To ensure charter school boards have access to clear expectations and;
3. To inform mid-term authorizing decisions.

This report 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.

Each measure included in the IPCSC'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, the IPCSC has suspended ratings (exceeds, meets, etc.) on academic and financial measures for the FY21 report. All outcomes are included in this report; however, outcomes are not rated.

Peace Valley Charter School Performance Certificate: [PVCS Performance Certificate](#)

Performance Framework: [IPCSC Performance Framework](#)

Current Term: 2017-2023

School Overview

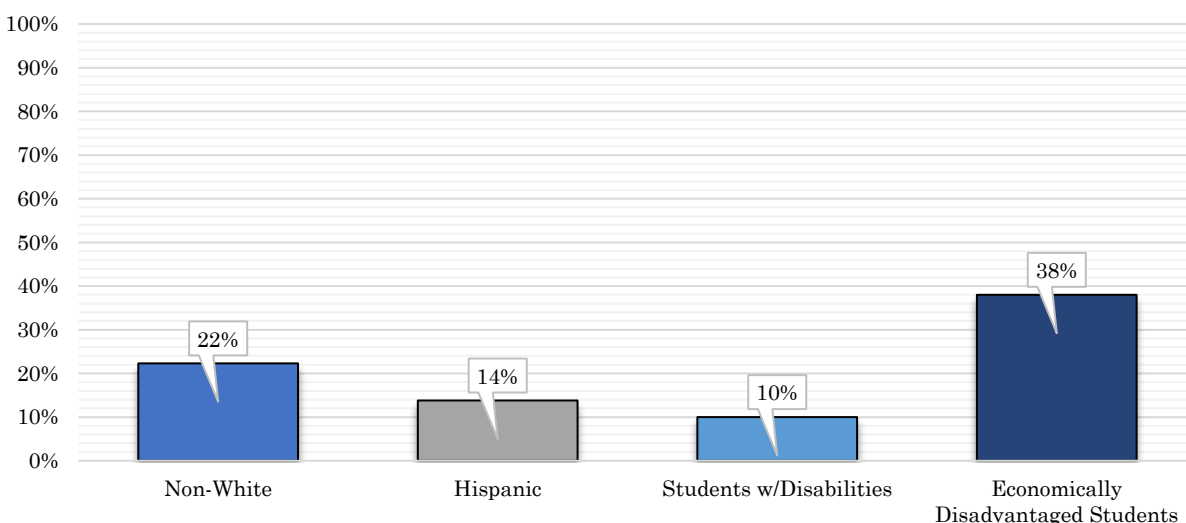
Model:	Waldorf
Enrollment Capacity:	540
Grades Served:	K-8
Enrollment Projected FY22:	360

Key Design Elements:

- A cross-disciplinary approach with block scheduling and rigorous, relevant, balanced, developmentally based curriculum.
- Sustainable living practices, environmental stewardship, and experiential learning through outdoor nature experiences, and gardening skills.
- Multi-sensory learning through singing, painting, movement, drawing, theater arts, storytelling, handwork, and the playing of recorders, flutes and stringed instruments.
- A foreign language program.
- A 'looping' or continuing relationship between the primary teacher and his or her respective class across the grades.

2021 PEACE VALLEY CHARTER SCHOOL DEMOGRAPHIC SUMMARY:

Peace Valley Charter School



2020-2021 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.

RATING LEGEND	DOES NOT MEET STANDARD	APPROACHES STANDARD	MEETS STANDARD	EXCEEDS STANDARD	NOT RATED DUE TO PANDEMIC
------------------	---------------------------	------------------------	-------------------	---------------------	------------------------------

ACADEMIC OUTCOMES:	
Math Proficiency	16%
Math Growth	<i>Data Not Available for 2020-2021</i>
ELA Proficiency	37%
ELA Growth	<i>Data Not Available for 2020-2021</i>
Literacy Proficiency	FALL IRI: 32% SPRING IRI: 21%

FINANCIAL OUTCOMES: NEAR TERM MEASURES	
Current Ratio	1.85
Unrestricted Days Cash	33
Default	None
Enrollment Variance	81.62%

OPERATIONAL OUTCOMES: BOARD STEWARDSHIP	
Governance Structure	MEETS STANDARD
Governance Oversight	MEETS STANDARD
Governance Compliance	DOES NOT MEET STANDARD

FINANCIAL OUTCOMES: SUSTAINABILITY MEASURES	
Total Margin 3 Yr. Aggregate Margin	TM: 3YR:
Cash Flow Multi-Year Cash Flow	CF: MY:
Debt Service Coverage Ratio	0.996
Debt Asset Ratio	.80
Financial Compliance	Notice of Fiscal Concern

OPERATIONAL OUTCOMES: MANAGEMENT	
Student Services	DOES NOT MEET STANDARD
Data Security/Transparency	DOES NOT MEET STANDARD
Facility & Services	MEETS STANDARD
Operational Compliance	MEETS STANDARD

Note: Due to the impact of the pandemic, Academic outcomes were not available for the 2019-2020 school year. Academic outcomes are available but will not be rated for the 2020-2021 school year.

Academic Outcomes

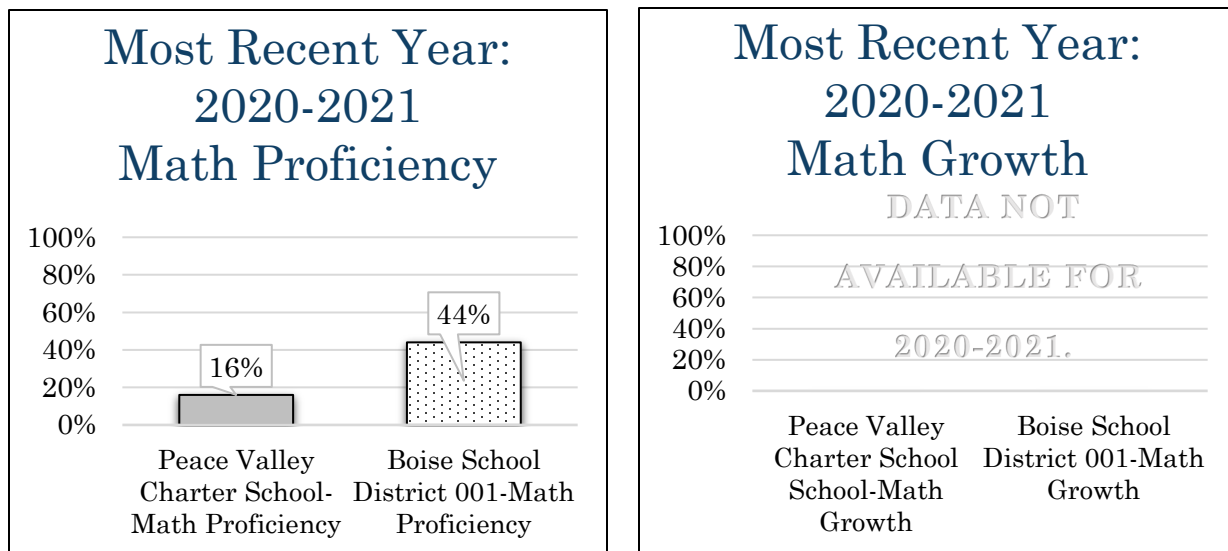
MATH PROFICIENCY & MATH GROWTH

Why This Matters:

The IPCSC must determine whether the academic performance at the school represents a favorable return on the investment of public dollars. For context, the IPCSC considers the school's performance in relation to other educational choices available to families. A school that performs as well or better than the average of its comparison group on the statewide mathematics assessment (ISAT) meets the IPCSC standard on both the math proficiency and math growth measures.

If this standard is not yet met, the school should focus its strategic planning on improving mathematics achievement outcomes to ensure the school will earn a next operational term. If the standard is met, strategic planning may focus on whatever data points will best establish and sustain an exemplary school of the specific model for which the school is chartered.

Comparison Group: Boise School District (001)



RATING LEGEND	DOES NOT MEET STANDARD	APPROACHES STANDARD	MEETS STANDARD	EXCEEDS STANDARD	NOT RATED DUE TO PANDEMIC
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*Please see the [Performance Framework Rubrics](#) for details regarding how each measure is rated.

MEASURE	PROFICIENCY RATING	APPLICABLE RUBRIC DESCRIPTION
MATH PROFICIENCY	Rating Not Applicable for 2020-2021	Not Applicable for 2020-2021 School Year

MEASURE	GROWTH RATING	APPLICABLE RUBRIC DESCRIPTION
MATH GROWTH	Rating Not Applicable for 2020-2021	Not Applicable for 2020-2021 School Year

Academic Outcomes

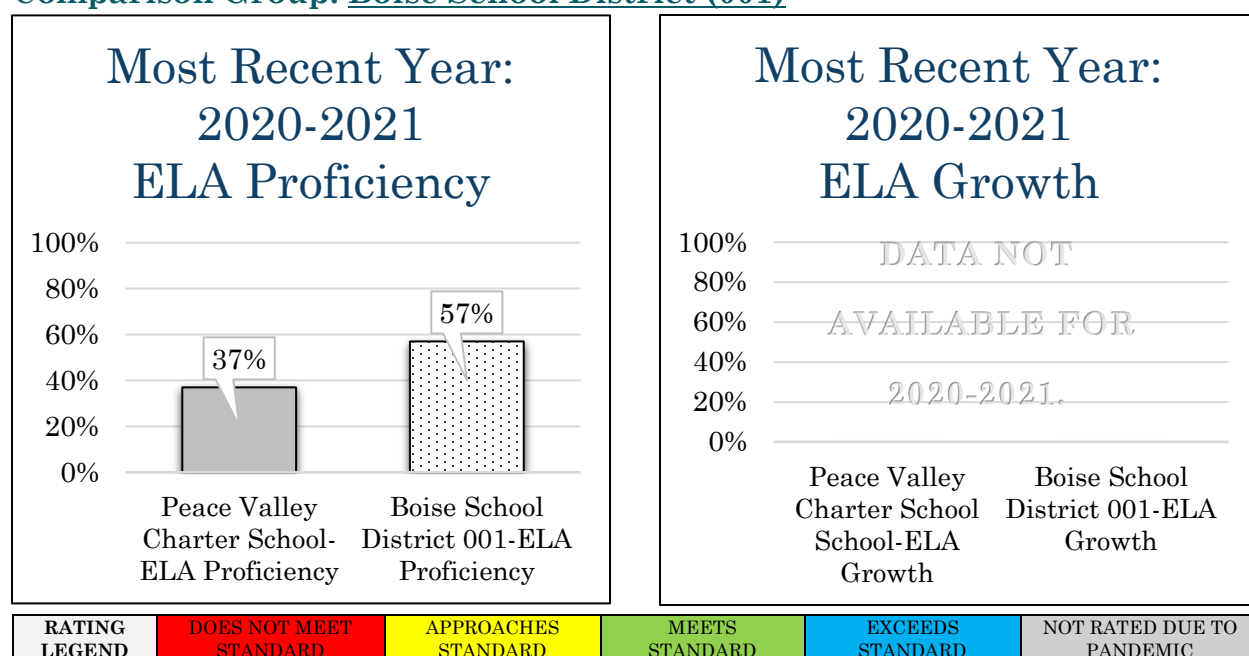
ELA PROFICIENCY & ELA GROWTH

Why This Matters:

The IPCSC must determine whether the academic performance at the school represents a favorable return on the investment of public dollars. For context, the IPCSC considers the school's performance in relation to other educational choices available to families. A school that performs as well or better than the average of its comparison group on the statewide ELA assessment (ISAT) meets the IPCSC standard on both the ELA proficiency and ELA growth measures.

If this standard is not yet met, the school should focus its strategic planning on improving these outcomes to ensure the school will earn a next operational term. If the standard is met, strategic planning may focus on whatever data points will best establish and sustain an exemplary school of the specific model for which the school is chartered.

Comparison Group: Boise School District (001)



*Please see the [Performance Framework Rubrics](#) for details regarding how each measure is rated.

MEASURE	PROFICIENCY RATING	APPLICABLE RUBRIC DESCRIPTION
ELA PROFICIENCY	Rating Not Applicable for 2020-2021	Not Applicable for 2020-2021 School Year

MEASURE	GROWTH RATING	APPLICABLE RUBRIC DESCRIPTION
ELA GROWTH	Rating Not Applicable for 2020-2021	Not Applicable for 2020-2021 School Year

Academic Outcomes

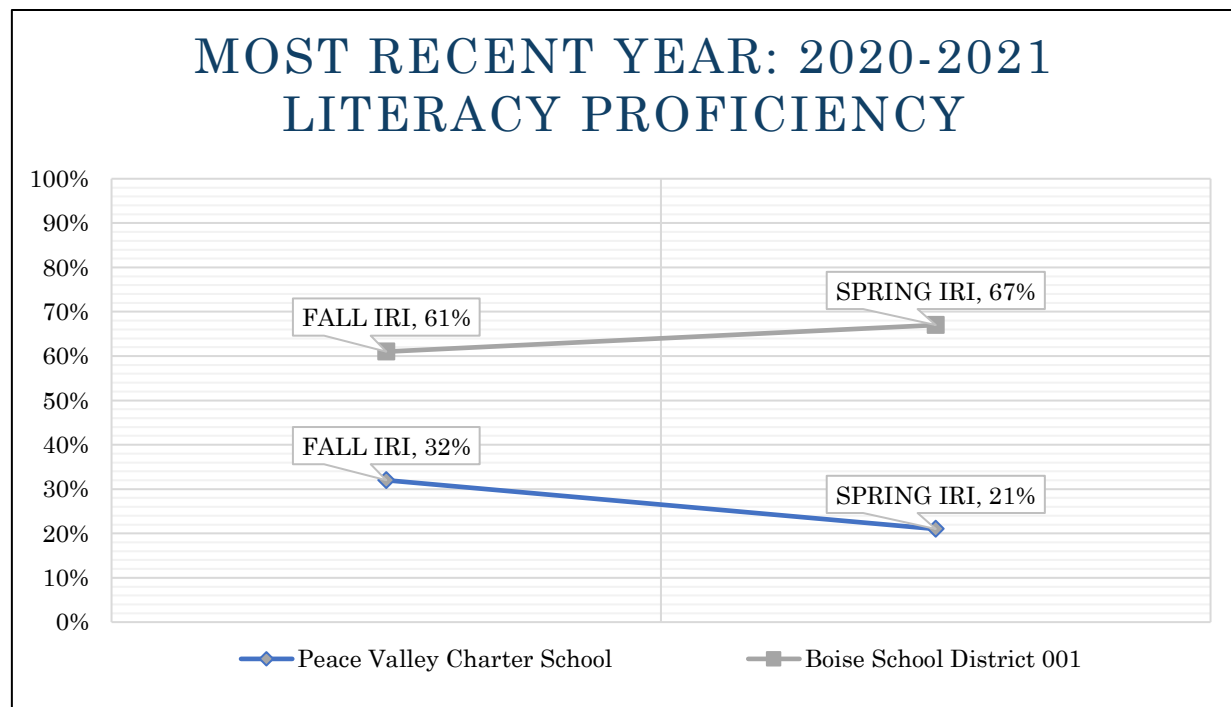
LITERACY PROFICIENCY

Why This Matters:

The IPCSC must determine whether the academic performance at the school represents a favorable return on the investment of public dollars. For context, the IPCSC considers the school's performance in relation to other educational choices available to families. A school that performs as well or better than the average of its comparison group on the spring statewide literacy assessment (IRI) meets the IPCSC standard. Alternatively, a school that did not perform as well or better than its comparison group on the spring assessment, but that did improve its outcome by at least 10% from fall to spring, also meets standard.

If this standard is not yet met, the school should focus its strategic planning on improving these outcomes to ensure the school will earn a next operational term. If the standard is met, strategic planning may focus on whatever data points will best establish and sustain an exemplary school of the specific model for which the school is chartered.

Comparison Group: Boise School District (001)



RATING LEGEND	DOES NOT MEET STANDARD	APPROACHES STANDARD	MEETS STANDARD	EXCEEDS STANDARD	NOT RATED DUE TO PANDEMIC
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*Please see the [Performance Framework Rubrics](#) for details regarding how each measure is rated.

MEASURE	PROFICIENCY RATING	APPLICABLE RUBRIC DESCRIPTION
LITERACY PROFICIENCY	Rating Not Applicable for 2020-2021	Not Applicable for 2020-2021 School Year

Longitudinal Academic Ratings | 2017-2023

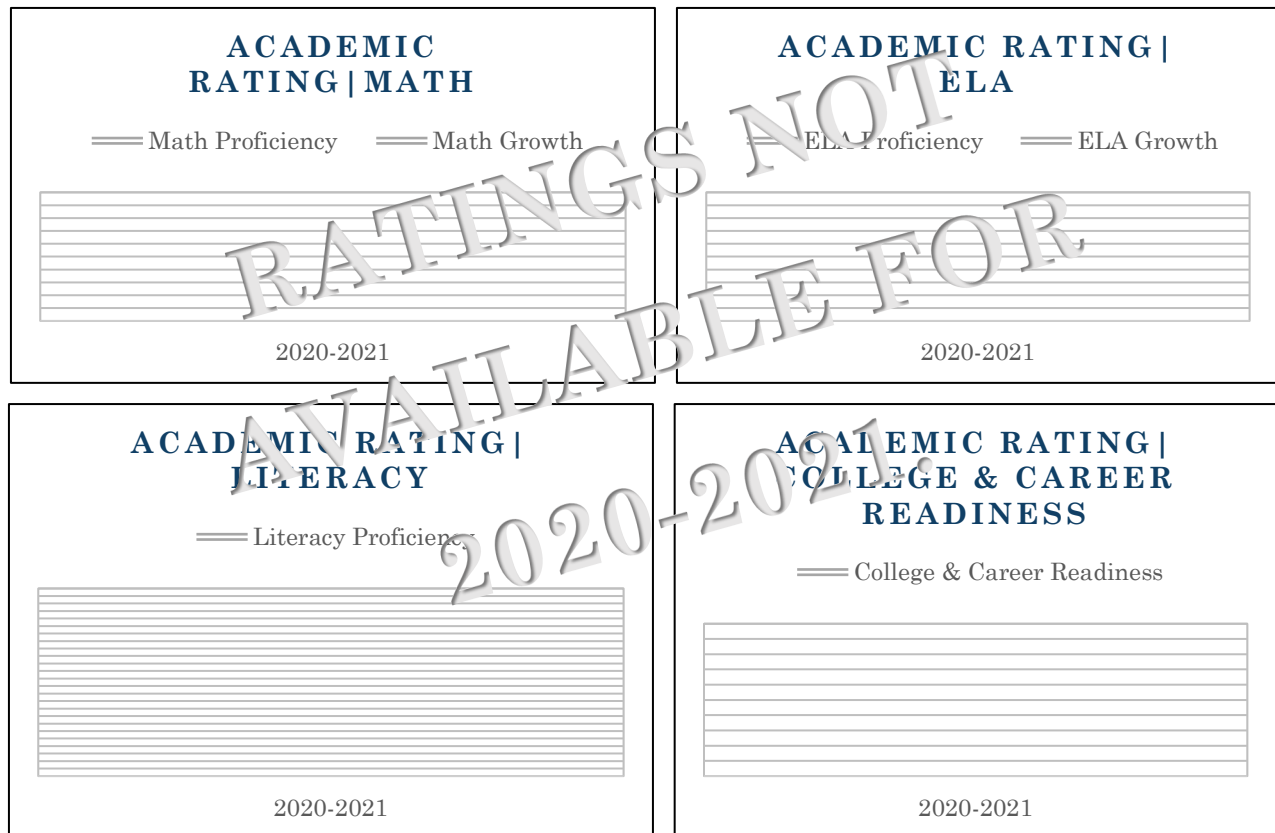
Longitudinal data provides a snapshot of a school's ratings over the school's current performance certificate (5 years). This data helps to identify performance trends and changes over time. Schools are encouraged to consider how this data might be used to drive strategic planning as the school approach its next renewal decision.

Academic Ratings | Historical Framework

SCHOOL YEAR	ACADEMIC GEN ED OUTCOME
2018-2019	CRITICAL
2019-2020	NOT RATED DUE TO PANDEMIC

Due to COVID-19 pandemic, no academic data was available for the 2019-2020 school year. Additionally, as ratings are used to inform charter renewal decisions, the IPCSC chose to suspend ratings for the 2020-21 school year due to the anticipated impact of the pandemic.

Academic Ratings | Revised Framework



RATING LEGEND	DOES NOT MEET STANDARD	APPROACHES STANDARD	MEETS STANDARD	EXCEEDS STANDARD	NOT RATED DUE TO PANDEMIC
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Operational Outcomes

BOARD STEWARDSHIP

Why This Matters:

At the highest level, the success of a charter school is driven by the ability of its governing board to govern effectively. The measures in this section help identify the strengths and challenges faced by the school's board. As success on these measures was not unduly influenced by the pandemic, ratings are applied for the 2020-2021 school year. *Please see the [Performance Framework Rubrics](#) for details regarding how each measure is rated.

STANDARD RATING: MEETS STANDARD	
Governance Structure Measure	Data/Evidence Source
The board bylaws are compliant with ID law.	Bylaws 1/7/2018. *Please provide an updated copy if any amendments have been made as of 7/1/21.
The school's articles of incorporation are current.	Articles of Incorporation initially filed on 11/8/2016. Most recently updated on 10/26/2017.
The board does operate in compliance with its bylaws.	*No instances of non-compliance documented.
Investigations were not conducted into 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.
Comments/ Context:	

STANDARD RATING: MEETS STANDARD	
Governance Oversight Measure	Data/Evidence Source
The IPCSC did not evaluate the boards review of academic data in a timely and thorough manner due to pandemic for 2020-2021.	*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.
Comments/ Context: School moved to ISBA policies, which allowed for more consistent and compliant policies.	

STANDARD RATING: DOES NOT MEET STANDARD	
Governance Compliance Measure	Data/Evidence Source
The IPCSC did 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.
Comments/ Context: PVCS failed to comply with a condition of their performance certificate which required the school achieve full accreditation status by 6/30/2021. On 6/10/2021, PVCS's board chair and school administrator addressed the commission on this matter. The IPCSC chose not to take action at that time.	

Operational Outcomes

MANAGEMENT

Why This Matters:

The systems and structures that support school operations are an important part of the school's overall success. The measures in this section help identify the strengths and challenges that impact the school's day-to-day operations. As success on these measures was not unduly influenced by the pandemic, ratings are applied for the 2020-2021 school year.

STANDARD RATING: DOES NOT MEET	
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 2020-2021
Comments/ Context: The SDE's federal programs team conducted an audit of the school student service programs funded by federal dollars in FY21 and identified a significant number of findings which have not yet been corrected. Though uncommon, a second audit is planned for FY22.	

STANDARD RATING: DOES NOT MEET STANDARD	
Data Security and Information Transparency	Data/Evidence Source
The school's website is not compliant and updated appropriately.	See comment below.
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.
Comments/ Context: Monthly expenditures are not posted on website (I.C. 33-357), (expenses for 2019 posted, not 2020-2021); contracts that support expenditures are not posted (I.C.33-357); Data collection, access, and security policy not posted online (I.C. 33-133); Annual Report not posted on website (I.C. 33-5209C(2); Continuous Improvement Plan not posted by October 31 st (version accessible on website was for 2018-2019 schoolyear)	

STANDARD RATING: MEETS STANDARD	
Facility and Services	Data/Evidence Source
The school's occupancy certificate is current.	*No instances of non-compliance documented.
Safety inspections and evacuation drills are compliant.	*Most Recent: 8/12/2021 No instances of non-compliance documented.
<i>The IPCSC did not evaluate school transportation for students due to measure being waived for 2020-2021.</i>	*No instances of non-compliance documented.
<i>The IPCSC did not evaluate school nutrition for students due to measure being waived for 2020-2021</i>	*No instances of non-compliance documented.
Comments/ Context:	

STANDARD RATING: MEETS 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.
Comments/ Context:	

Longitudinal Operational Ratings | 2017-2023

Board Stewardship

Longitudinal data provides a snapshot of a school's ratings over the school's current performance certificate (5 years). This data helps to identify performance trends and changes over time. Schools are encouraged to consider how this data might be used to drive your strategic planning as your school approach its next renewal decision.

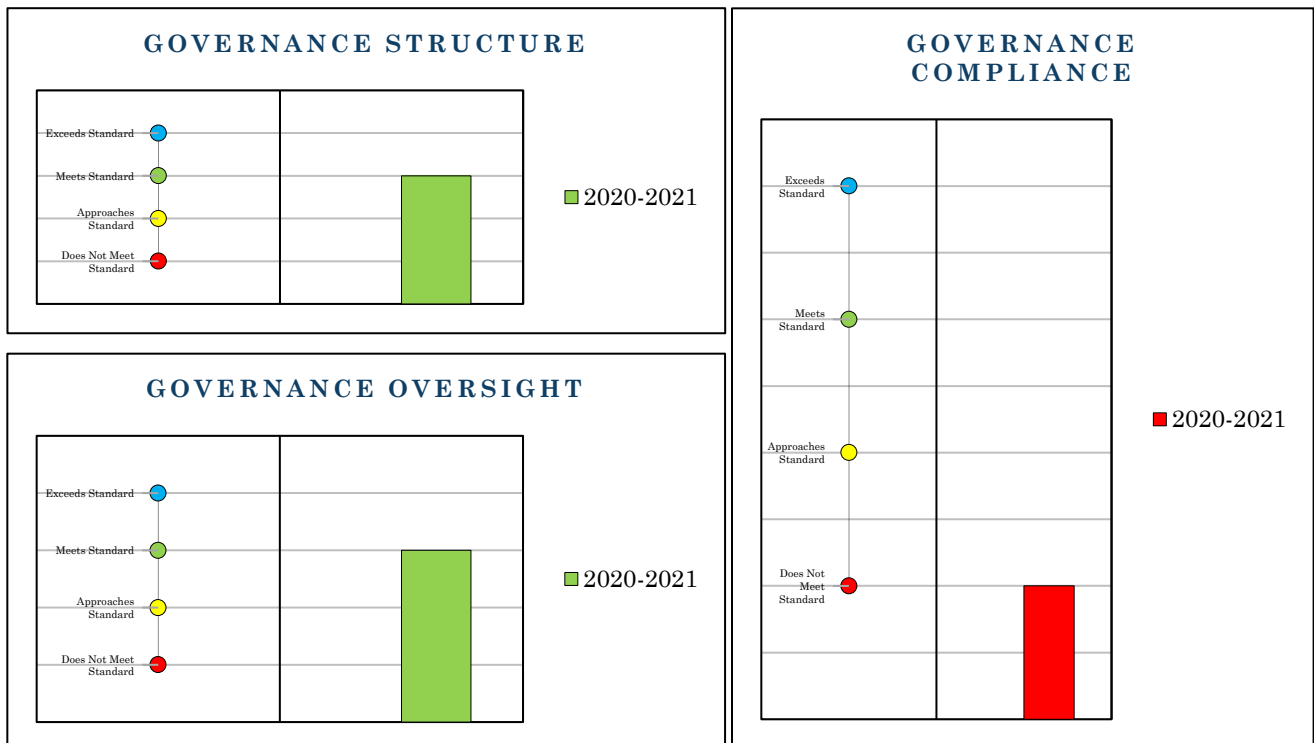
Ratings on the historical and revised framework are not comparable in the operational section. The two sets of data have been included. The school's operational ratings on the historical framework are provided for reference.

Operational Ratings | Historical Framework

School Year	Rating
2018-2019	REMEDIATION
2019-2020	REMEDIATION

Note: In 2020, the IPCSC reorganized these measures for clarity. Operational outcomes are now divided into two sections (board stewardship and management) based on the primary party responsible for the school's success on each measure.

Operational Ratings: Board Stewardship | Revised Framework



Longitudinal Operational Ratings | 2017-2023

Management

Longitudinal data provides a snapshot of a school's ratings over a 5-year period. This data helps to identify performance trends and changes over time. Schools are encouraged to consider how this data might be used to drive your strategic planning as your school approach its next renewal decision.

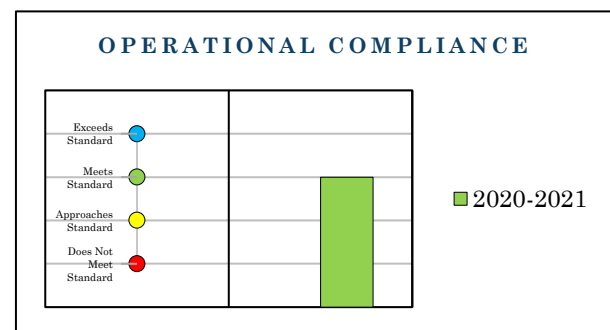
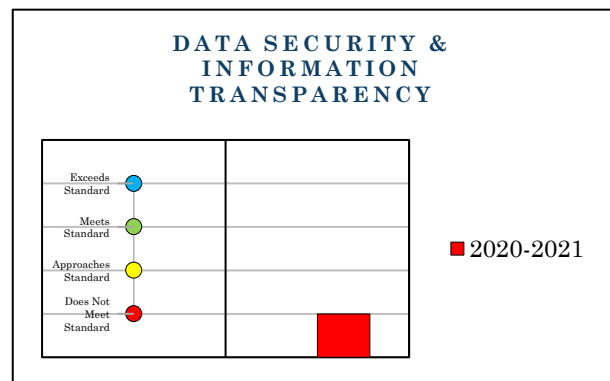
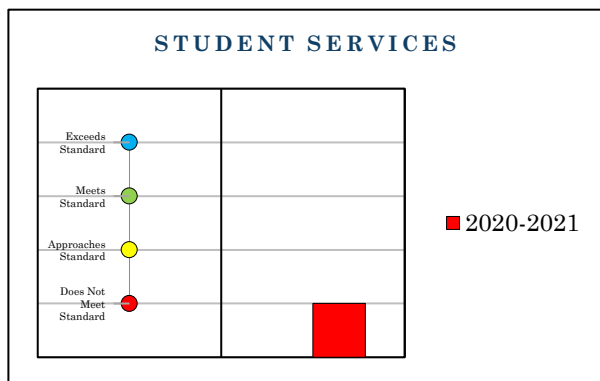
Ratings on the historical and revised framework are not comparable in the operational section. The two sets of data have been included. The school's operational ratings on the historical framework are provided for reference.

Operational Ratings | Historical Framework

School Year	Rating
2018-2019	REMEDIATION
2019-2020	REMEDIATION

Note: In 2020, the IPCSC reorganized these measures for clarity. Operational outcomes are now divided into two sections (board stewardship and management) based on the primary party responsible for the school's success on each measure.

Operational Ratings: Management | Revised Framework



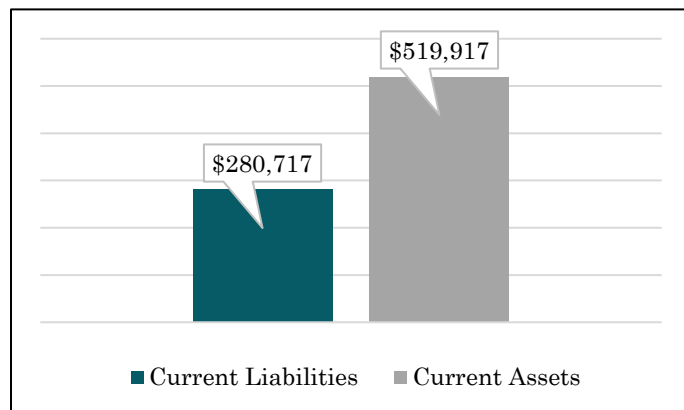
Financial Outcomes

NEAR TERM MEASURES

These measures evaluate whether a school is likely to meet its financial obligations in the next year.
 *Please see the [Performance Framework Rubrics](#) for details regarding how each measure is rated.

Current Ratio

The school has a current ratio of more than 1.5.	Current Ratio 1.85	Ratings Not Applicable for 2020-2021
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Why This Matters:

Current Ratio is a comparison of a school's financial obligations due within one year (current liabilities) to the cash and investments held by the school (current assets).

A school with more assets than liabilities (a Current Ratio greater than 1.0) would be able to meet its financial obligations for the

next year without relying on future revenue.

A school with more liabilities than assets (a Current Ratio of less than 1.0) is dependent on revenue it has not yet received to meet existing financial obligations.

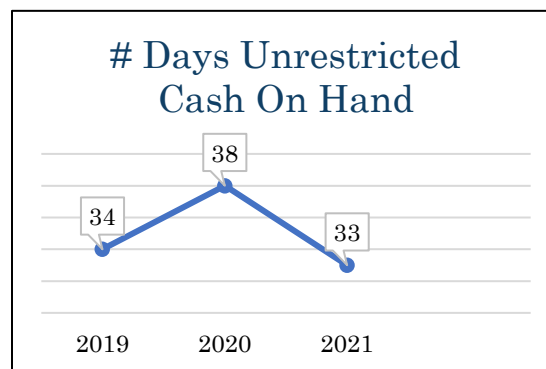
Unrestricted Days Cash

The school has between 30 and 60 days cash on hand, but the 1-year trend is negative.	33 Days	Ratings Not Applicable for 2020-2021
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Why this Matters:

This measure estimates a school's average daily cost of operations and considers the number of days a school could operate using only its available cash and investments.

A school with at least 60 days cash on hand would be able to meet its immediate financial obligations with available cash, buying the time it might take to access other current assets. Occasionally, a planned purchase may decrease this number temporarily. In those cases, 30-60 days cash on hand with an upward trend is acceptable. A school with less than 15 days cash on hand is in financial distress and is at risk of automatic closure.



Default

The school is not in default of any financial obligations and did not experience any instances of default during the fiscal year.	Ratings Not Applicable for 2020-2021
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Why this Matters:

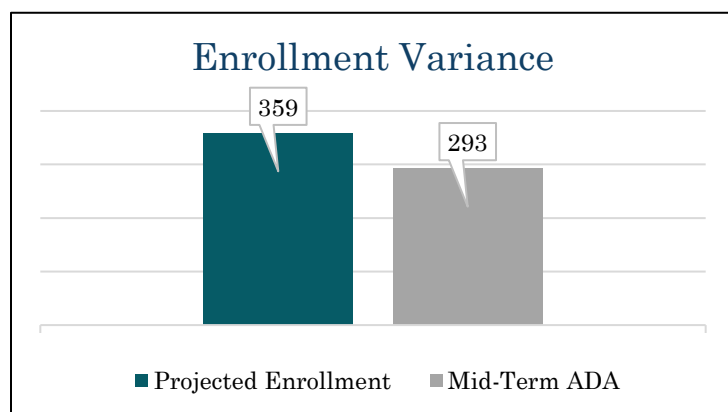
This measure identifies whether a school has defaulted on any of its financial obligations. Default can mean many things. Examples of default include: paying bills late, failing to make payroll, or inaccurately filing reports required for funding. Default can also include a failure to meet any additional requirements of long-term debt as established by the lender (such as meeting a specific enrollment target or maintaining a greater amount of cash on hand than the PCSC requires).

Any act of default can result in disruption of services, loans being called due, or funding that is inaccurate or withheld.

Comments/Context:

Enrollment Variance

The school achieved and sustained less than 90% of its projected enrollment and did not provide a mid-year amended budget evidencing a break-even financial plan.	Enrollment Variance 81.62%	Ratings Not Applicable for 2020-2021
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Why this Matters:

The Enrollment Variance measure considers what percentage of a school's projected enrollment was achieved. As the majority of a public school's funding is generated by student enrollment, this measure reflects a school's ability to execute its budget to plan.

A school that achieves at least 95% of its projected enrollment will likely experience few bumps and may make minor adjustments. A school that achieves less than 95% of projected enrollment is likely to face budget challenges requiring more significant budget amendments and may be in financial distress.

Financial Outcomes

SUSTAINABILITY MEASURES

These measures help determine whether a school is likely to remain financially stable into the future.

Total Margin

The school's aggregated 3-year total margin is greater than -1.5%, but the trend is negative over the past two years and/or the most recent year total margin is negative.	CY Total Margin -.14% 3-Year Aggregated 2.95%	Ratings Not Applicable for 2020-2021
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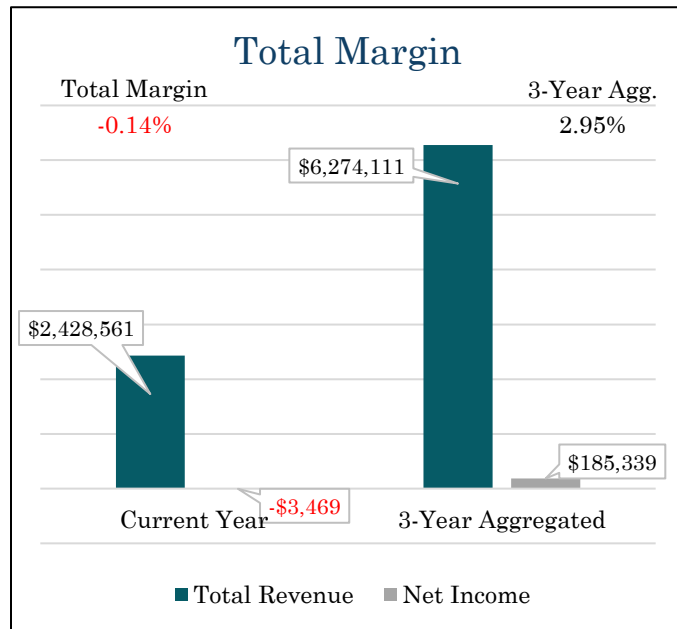
Why this Matters:

The Total Margin compares a school's total revenue to its net income. Specifically, this measure identifies what percentage of a school's total revenue in a given year was not expended during that year. A school with a positive total margin spent less than it brought in. That is, the school is living within its means and can plan for future purchases and investments.

An occasional negative total margin may indicate that a planned or necessary purchase has taken place. This is not necessarily a negative indicator.

However, if the Total Margin is chronically negative or severe decreases appear, the school may be in financial distress. Aggregating this margin over three years helps to identify these long-term trends.

Note: for the purposes of this calculation, pension liability is excluded from the school's net income.



Cash Flow

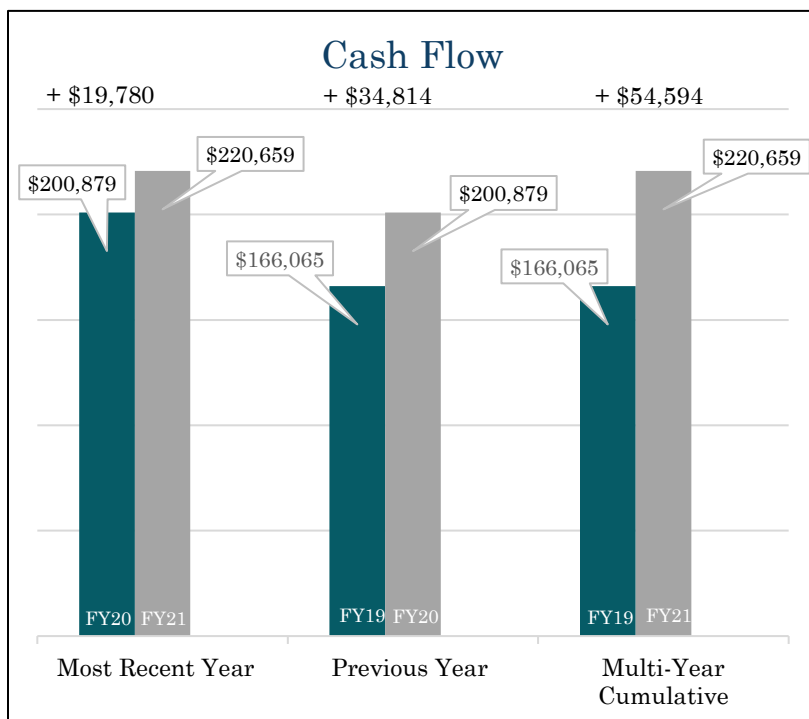
The school's multi-year cumulative cash flow is positive and the most recent year's cash flow is positive.	Most Recent Year \$19,780 Previous Year \$34,814 Multi-Year \$54,594	Ratings Not Applicable for 2020-2021
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Why this Matters:

The Cash Flow measure considers the change in a school's cash balance over time. A school with a positive cash flow is increasing its reserves and is likely able to fund future projects and purchases.

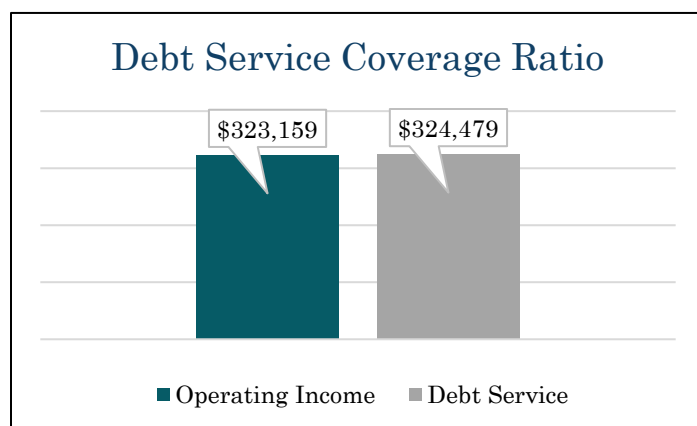
A school with a negative cash flow is using its existing reserves to fund general operations and is not likely to have the financial flexibility to fund future plans.

A multi-year cumulative cash flow helps to identify long-term trends.



Debt Service Coverage Ratio

The school's debt service coverage ratio is between .9 and 1.09.	Debt Service Coverage Ratio 0.996	Ratings Not Applicable for 2020-2021
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Why this Matters:

This measure evaluates a school's ability to make payments on debt due in a given year using only that year's income. This helps determine whether a school has more debt than it can manage.

A school with more Operating Income than Debt Service (a Debt Service Coverage Ratio greater than 1) can meet the financial obligations of their debt. A

school with more Debt Service than Operating Income (a ratio of less than 1) is reliant on either reserves or revenues anticipated in future years to meet its debt obligations.

Debt to Asset Ratio

The school's Debt to Asset Ratio is less than 0.9.	Debt/Asset Ratio .80	Ratings Not Applicable for 2020-2021
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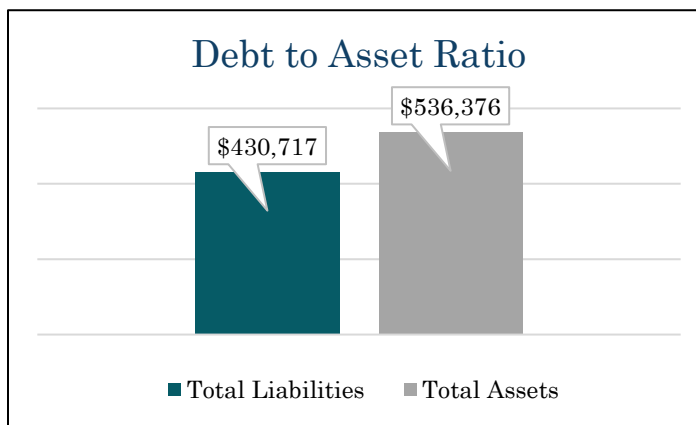
Why This Matters:

The Debt to Asset Ratio compares a school's total liabilities to its total assets. This helps determine whether a school would be able to meet both its short and long-term financial obligations.

A school whose total liabilities are 90% or less of its Total Assets is

likely to be able to repay all short-term debts and still manage to set its long-term affairs in order in a worst-case scenario. A school with more liabilities than assets would not be able to meet all its financial obligations in a worst-case scenario.

Note: for the purposes of this measure, pension liability is excluded from the school's total liabilities.



Financial Compliance

STANDARD RATING: NOT RATED FOR 2020-2021	
Financial Operations	Data and/or Evidence Source
The school's finances are managed in compliance with GAAP.	Financial Audit 10/18/2021
Expenditures and contracts are not posted online appropriately.	School's Expenditure Page 7/30/2021 *See Comments
The school maintains compliant internal controls.	*No instances of non-compliance documented.
The school is operating under a Notification of Fiscal Concern.	Issued 6/11/21
The school is not operating under a Notification of Possible or Imminent Closure.	*No instances of non-compliance documented.
Comments/Context IPCSC Staff were unable to verify/locate that the school had its expenditures and contracts uploaded to the school website.	

Longitudinal Financial Ratings | 2017-2023

Longitudinal data provides a snapshot of a school's ratings over the school's current performance certificate (5 years).. This data helps to identify performance trends and changes over time. Schools are encouraged to consider how this data might be used to drive your strategic planning as your school approach its next renewal decision.

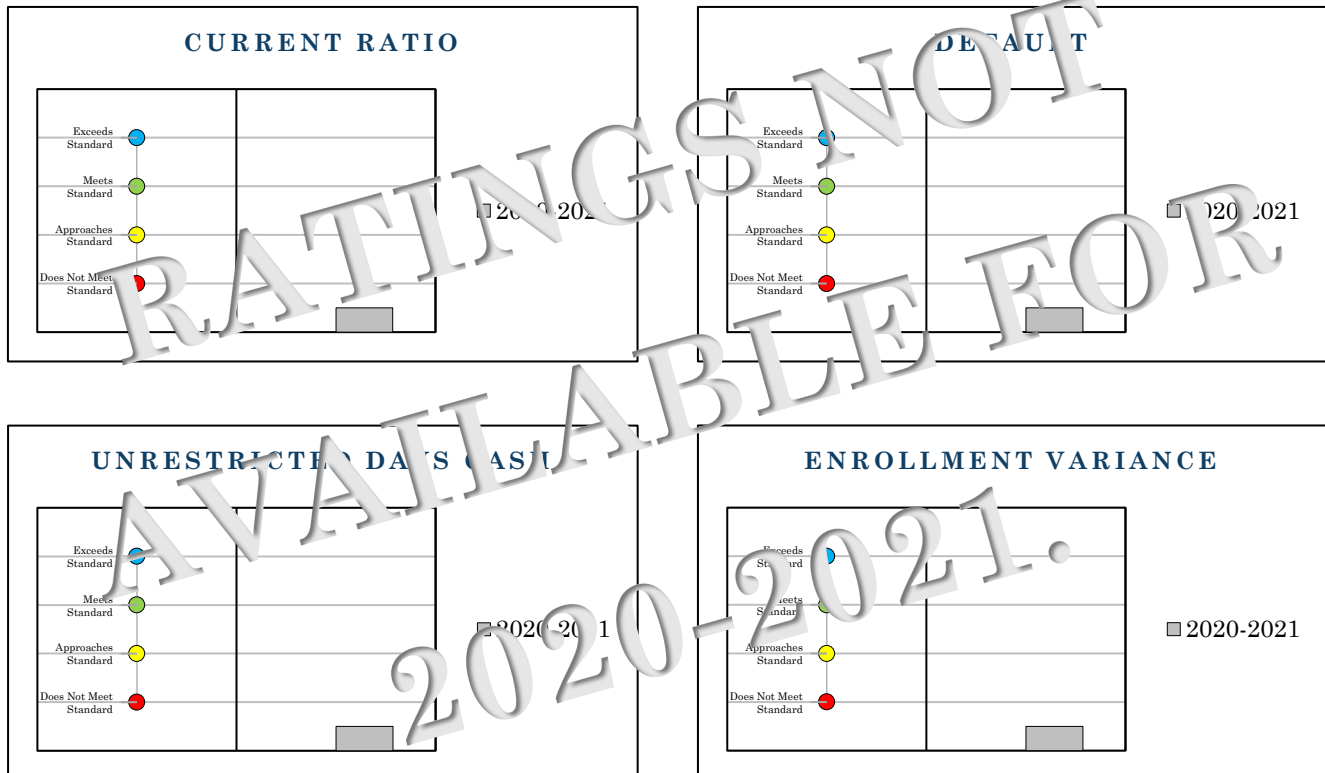
Notes: The 2020 framework revision removed the "cash ratio" measure and moved the existing enrollment variance measure to the financial section.

Due to the impact of the pandemic, financial outcomes are not rated for 2020-21. Additionally, the enrollment variance measure was calculated based on projected enrollment and actual enrollment (not ADA).

Financial Near Term Health Ratings | Historical Framework

School Year	Near Term Health Rating
2018-2019	REMEDIATION
2019-2020	HONOR

Financial Near Term Health Ratings | Revised Framework



Longitudinal Financial Ratings | 2017-2023

Longitudinal data provides a snapshot of a school's ratings over the school's current performance certificate (5 years). This data helps to identify performance trends and changes over time. Schools are encouraged to consider how this data might be used to drive your strategic planning as your school approach its next renewal decision.

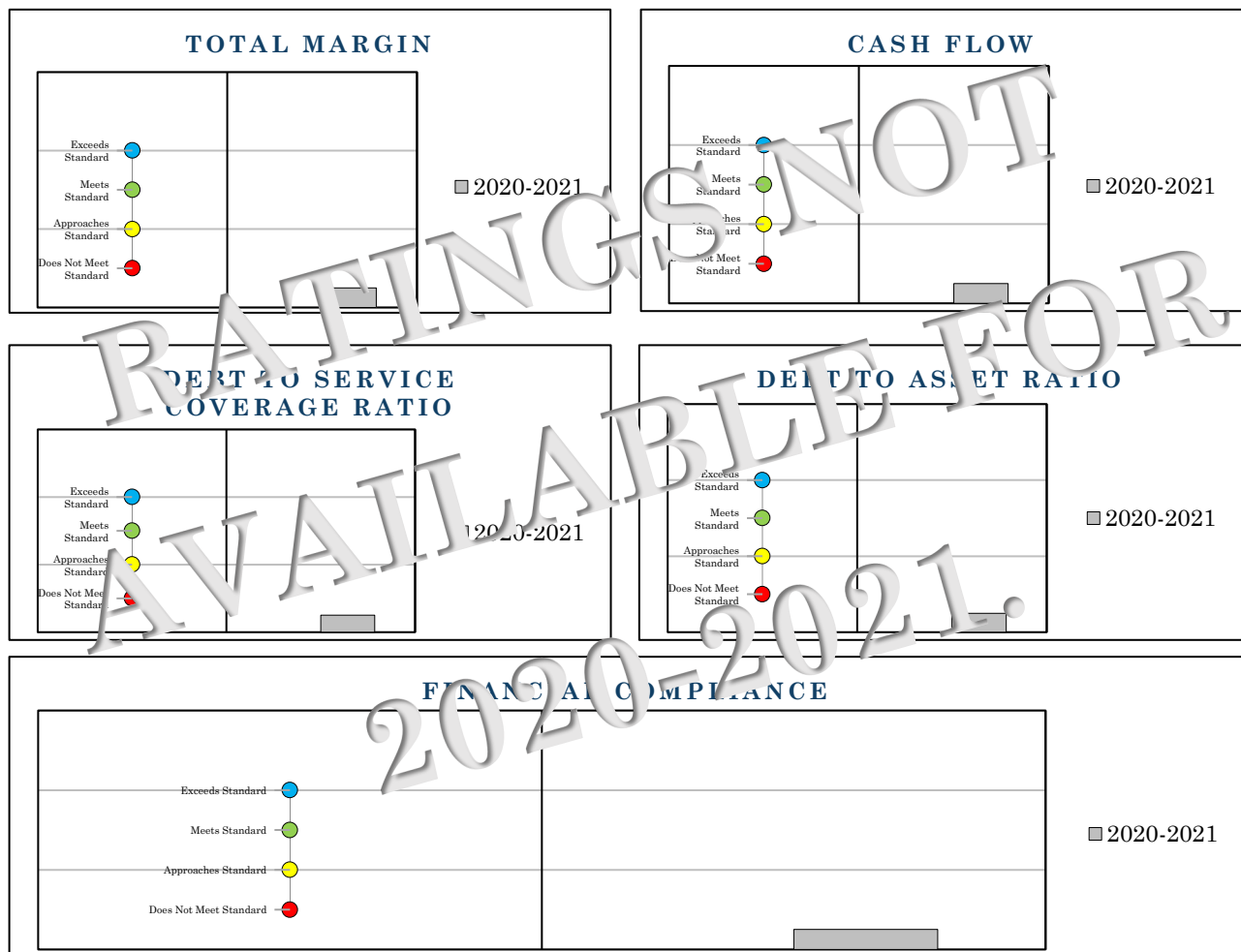
Notes: The 2020 framework revision removed the "cash ratio" measure and moved the existing enrollment variance measure to the financial section.

Due to the impact of the pandemic, financial outcomes are not rated for 2020-21. Additionally, the enrollment variance measure was calculated based on projected enrollment and actual enrollment (not ADA).

Financial Sustainability Ratings | Historical Framework

School Year	Sustainability Rating
2018-2019	REMEDATION
2019-2020	HONOR

Financial Sustainability Ratings | Revised Framework



Conditional Certificate Status Update

Peace Valley Charter School's Performance Certificate was initially approved in 2017 subject to the conditions listed below. The school's status with regard to each condition is also provided.

Condition 1: Terms of Condition Met

PVCS will amend the petition to satisfactorily address the remaining deficiencies noted in the petition evaluation rubric, as evaluated by PCSC staff, prior to 8:00 a.m. on December 4, 2017

Status: This condition was met by the stated date.

Condition 2: Terms of Condition Met

PVCS will file the draft amendment to Article 9 of its Articles of Incorporation with the Secretary of State prior to 8:00 a.m. on December 4, 2017.

Status: This condition was met by the stated date.

Condition 3: Terms of Condition Met

PVCS will demonstrate completion of the alignment of its K-6 curriculum with the Idaho Content Standards no later than June 1, 2018. Curriculum for any additional grades will be fully aligned by June 1 of each calendar year in which PVCS begins offering those grades.

Status: The school's K-6 curriculum alignment was reviewed and approved by the PCSC by June 1, 2018. The school's final evaluation of curriculum alignment was due in June of 2020, regarding the addition of 7th and 8th grades. As conditions due in June of 2020 were waived due to the pandemic, a final curriculum evaluation was not conducted.

Condition 4: Condition Not Met

PVCS will achieve accreditation candidacy status by July 1, 2019, and full accreditation through the Northwest Accreditation Commission by July 1, 2021.

Status: The school did not achieve accreditation candidacy status by July 1, 2019. The PCSC held a hearing on September 19, 2019 to discuss the issue with the school. The PCSC took no action at that time, but advised the school to work toward the 2021 condition deadline. The school did not achieve accreditation or accreditation candidacy status by July 1, 2021. The school provided an update to the IPCSC in June of 2021. The IPCSC chose not to pursue action, but encouraged the school to achieve this goal before a renewal decision is necessary in 2023.

Condition 5: Terms of Condition Met

PVCS will provide to the PCSC a balanced budget that is fully documented, including facility contracts and enrollment lottery results, no later than June 1, 2018, in order to exercise the option to open in fall 2018.

Status as of 2019-20 Annual Report Issuance: This condition was met by the stated date.

*The 2020-2021 Annual Report has been finalized by the
Idaho Public Charter School Commission staff.*

If you have any questions or comments, please contact
the IPCSC.



IDAHO PUBLIC CHARTER SCHOOL COMMISSION

304 N. 8th St. Ste.242

Boise, ID 83720

208-332-1561

pcsc@osbe.idaho.gov

VI. NOTIFICATION OF FISCAL CONCERN

C. The Village Leadership Academy

APPLICABLE STATUTE, RULE, OR POLICY

I.C. §33-5209C(3)
IPCSC Policy, Section VI.E

BACKGROUND

Pursuant to Idaho Code, if the IPCSC has reason to believe that a public charter school may not remain fiscally stable for the remainder of its performance certificate term, the IPCSC shall issue to the State Department of Education written notification of concern.

DISCUSSION

The Village Leadership Academy (formerly The Village Charter School) has been engaged in renegotiating its facility debt structure since 2018. Technically, the school is in default of loan covenants, specifically those related to maintaining a minimum enrollment that may not be viable in the facility or the location.

In 2020 and 2021, the bond holder granted a forbearance of debt principal to provide the school some financial relief while it focused on recovering academically and operationally. The school made interest-only payments during that time. Regular payments have now resumed. The school is continuing to seek refinancing options.

While the bond holder has verbally stated its intent to not call the debt due, this agreement is not documented, leaving the school vulnerable.

The IPCSC chose to maintain TVCS's notification of fiscal concern in 2020 and 2021 based on the same lack of documentation.

The school is not requesting to have the notification of fiscal concern lifted.

SPEAKER

As the school is not requesting a change, no direct address is necessary. However, several representatives of the school will be present for questions:

Board Chair, Adrian Casteneda
Principal, Josh Noteboom
Financial Advisor, Adam Holcomb, MAST Financial

IMPACT

If the IPCSC maintains the notification of fiscal concern the school and the SDE will be notified in writing, and the SDE will proceed with a modified distribution of the school's financial disbursements.

If the IPCSC lifts the notification of fiscal concern the school and the SDE will be notified in writing and the school will receive financial distributions for FY23 on the regular schedule, with 75% of the annual revenue projection issued by Nov. 15th.

STAFF COMMENTS AND RECOMMENDATIONS

Staff recommends that the IPCSC maintain the notification of fiscal concern.

COMMISSION ACTION

A motion to lift the notification of fiscal concern for The Village Leadership Academy as of June 30, 2022;

OR

A motion to maintain the notification of fiscal concern for The Village Leadership Academy through fiscal year 2023.

VII. ANNUAL REPORT REVIEW

APPLICABLE STATUTE, RULE, OR POLICY

Idaho Code §33-5209C – re. Enforcement

Idaho Code §33-5209A – re. Framework

Idaho Code §33-5209B(7) – re. Renewals

BACKGROUND

Idaho Code §33-5209C tasks authorized chartering entities with continually monitoring the performance and legal compliance of the public charter schools it oversees, including analyzing data to support ongoing evaluation according to the performance certificate.

Idaho Code §33-5209A requires that performance certificates contain frameworks and that frameworks establish the measures and metrics used to evaluate at least the following: student proficiency, growth, and college and career readiness; board performance and stewardship; and school operations, including finance.

Idaho Code §33-5209B(7) requires authorizers to make renewal decisions based on: the school's performance outcomes on the framework; the school's compliance with applicable laws, rules, policies, and regulations and the terms of its performance certificate (operational contract); and the school's annual financial audit.

Idaho Code §33-5209B(4) requires that, as part of the renewal process, authorizers provide opportunity for each school to present additional evidence, beyond the data contained in the performance report, supporting its case for charter renewal and to describe improvements undertaken or planned by the school.

In 2020, Senate Bill 1192 removed the IPCSC's ability to include "mission specific goals" in any school's performance framework.

DISCUSSION

The IPCSC authorizes 63 schools, 8 of which offer both regular education and alternative education academic programs. In April, various commissioners expressed interest in better understanding how well the recently revised framework measures are reflecting the performance of individual schools.

In an effort to provide Commissioners opportunity to review the data used to inform the IPCSC's annual performance reports at an individual school level outside of any need to make a renewal decision, staff has proposed that this agenda item be considered for a regular feature of IPCSC meetings. The proposed schedule would provide for two reviews of each school during each performance certificate term.

The goal of this agenda item is to provide a platform for a Commission discussion of demographics, outcomes, and comparison groups at a data-specific level rather than at an anecdotal or more generalized level.

Staff will review the slide deck included in these materials.

These discussions may generate interest in inviting some schools (particularly those with unique student populations) to address the Commission at a future meeting.

In past years, the IPCSC has required all schools to present an annual update. The practice was not well received by schools, and considering the number of schools authorized by the IPCSC, that practice is no longer practical.

The proposed practice would allow the commission opportunity to think deeply about each school individually. When necessary, it would also provide opportunity for a separate follow up discussion with the school based on a narrowed scope and with time to prepare.

SPEAKER

Program Managers, Melissa-Jo Rivera and Jared Dawson

IMPACT

Information Only.

STAFF COMMENTS AND RECOMMENDATIONS

Staff has no recommendations or comments.

COMMISSION ACTION

No action

Future Public School



Future Performance FY 21 Annual Report Snapshot

- IPCSC approved to waive Academic Ratings for the 2019-2020 & 2020-2021.
- IPCSC approved to waive Financial Outcome ratings for the 2020-2021 school year.
- FPS is on year (2) of the revised framework (2020) and custom comparison group.

ACADEMIC OUTCOMES:	
Math Proficiency	36%
Math Growth	Data Not Available for 2020-2021
ELA Proficiency	41%
ELA Growth	Data Not Available for 2020-2021
Literacy Proficiency	FALL IRI: 50% SPRING IRI: 60%

OPERATIONAL OUTCOMES: BOARD STEWARDSHIP	
Governance Structure	Exceeds Standard
Governance Oversight	Exceeds Standard
Governance Compliance	Exceeds Standard

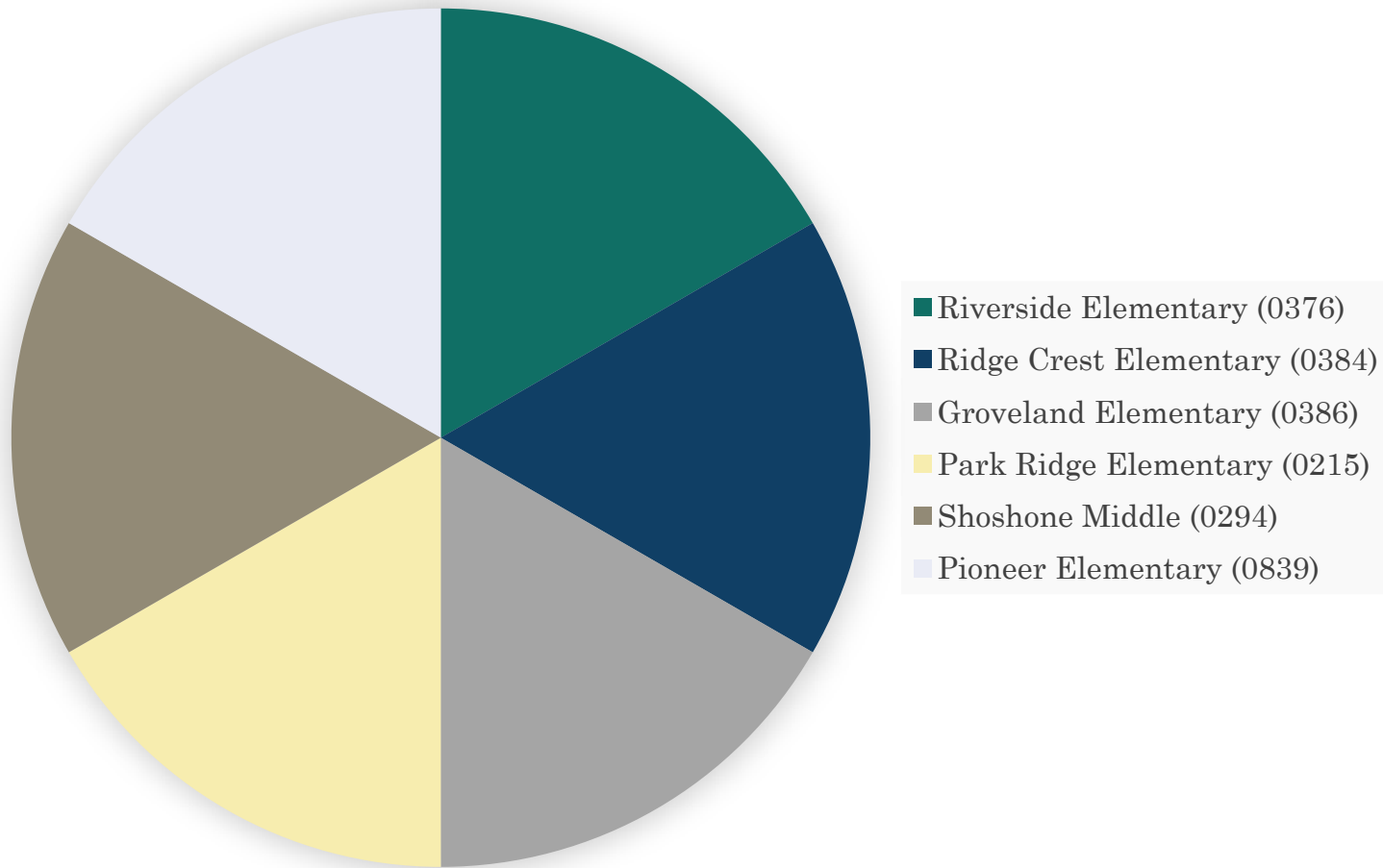
OPERATIONAL OUTCOMES: MANAGEMENT	
Student Services	Exceeds Standard
Data Security/Transparency	Exceeds Standard
Facility & Services	Exceeds Standard
Operational Compliance	Exceeds Standard

FINANCIAL OUTCOMES: NEAR TERM MEASURES	
Current Ratio	1.13
Unrestricted Days Cash	62
Default	None
Enrollment Variance	97.94%

FINANCIAL OUTCOMES: SUSTAINABILITY MEASURES	
Total Margin	TM: 4.00%
3 Yr. Aggregate Margin	3YR: 7.39%
Cash Flow	CF: \$186,228
Multi-Year Cash Flow	MY: \$377,945
Debt Service Coverage Ratio	1.23
Debt Asset Ratio	.42
Financial Compliance	Not Rated for 2020-2021

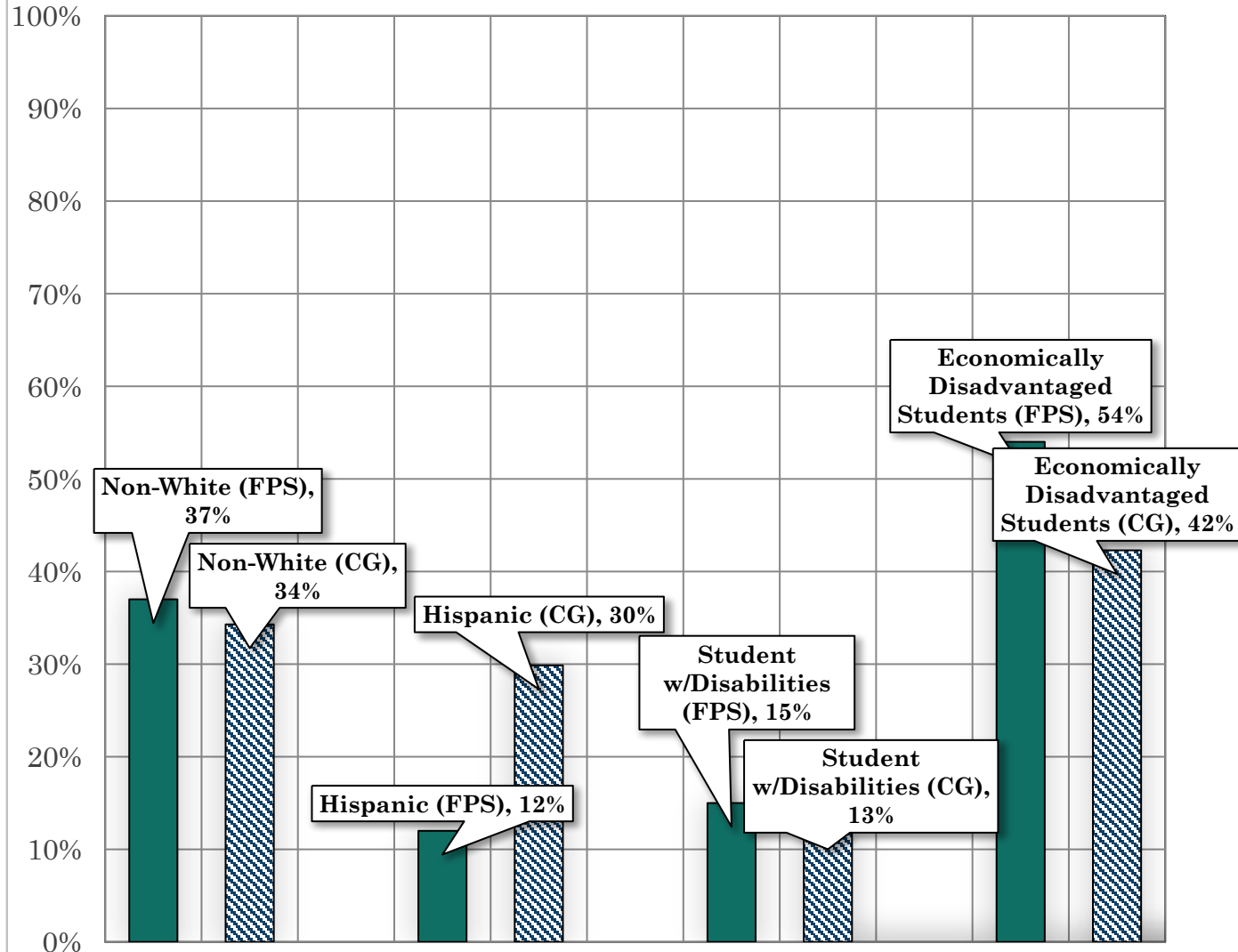
RATING LEGEND	DOES NOT MEET STANDARD	APPROACHES STANDARD	MEETS STANDARD	EXCEEDS STANDARD	NOT RATED DUE TO PANDEMIC
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Future Public School Custom Comparison Group



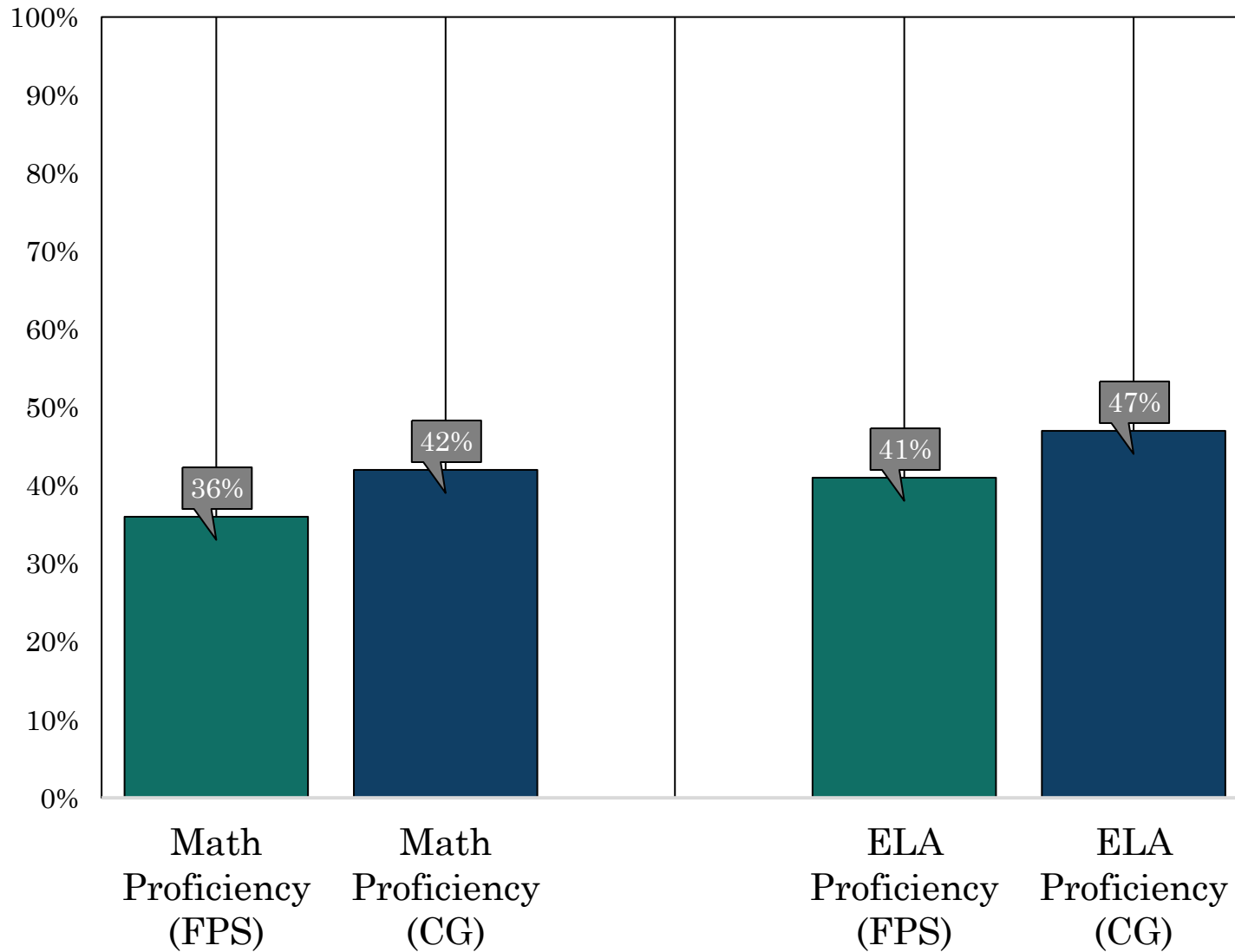
- The school requested a minor amendment in 2020 to include a customized revision to the group of schools/districts compared to, which is customized individually for each school request.
- Schools/districts included in a custom comparison group are based off similar school demographics.
- School and district demographic data is compiled from the State Department of Education reporting.
- The IPCSC Director and School Board agree to the amendment with the new custom comparison group.
- The IPCSC Chair and School Board Chair finalize the amended agreement.

Future Public School & Custom Comparison Group Demographic Comparison FY21



- Demographic data is pulled from SDE Reporting
- The custom comparison group data is averaged not aggregated.
- The school's ability to meet standard is evaluated against their custom comparison group outcomes.

FUTURE PUBLIC SCHOOL FY21 ACADEMIC OUTCOMES Comparison



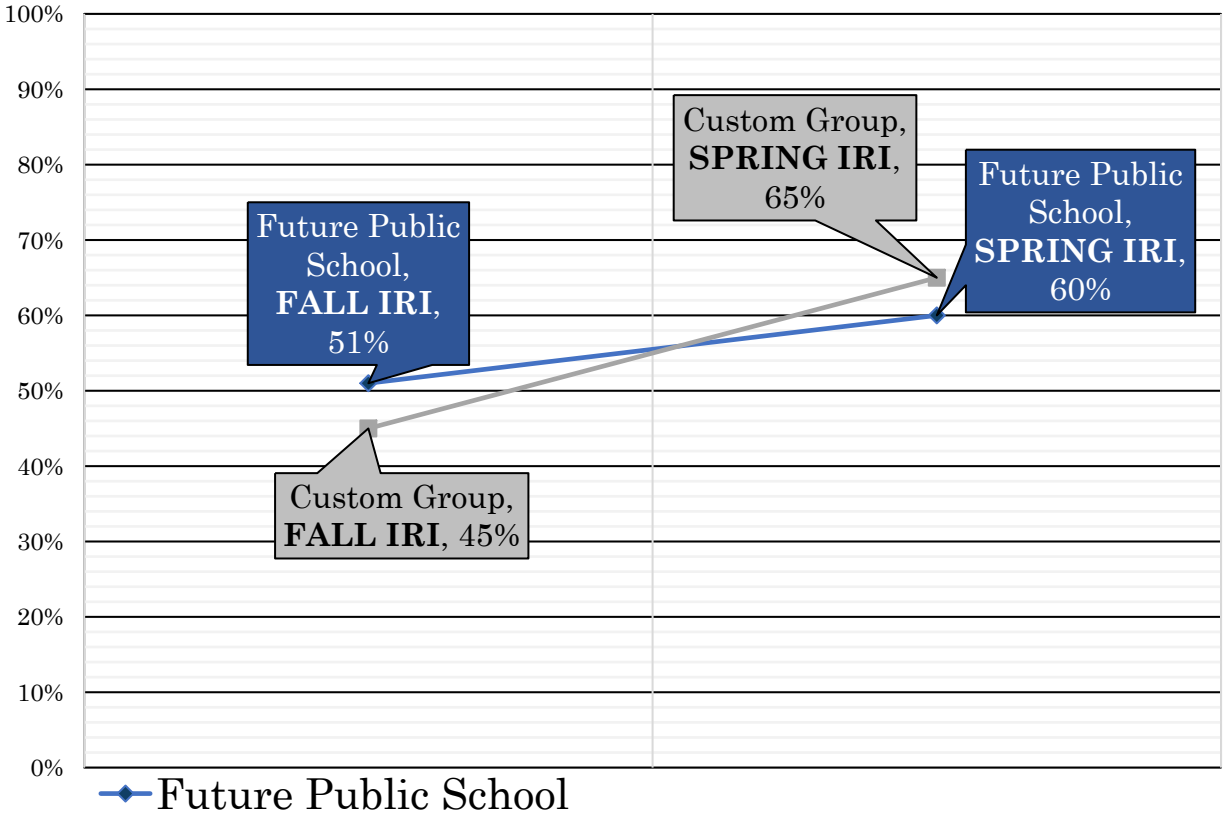
CUSTOM COMPARISON GROUP (CG):

- RIVERSIDE ELEMENTARY (0376);
- RIDGE CREST ELEMENTARY (0384);
- GROVELAND ELEMENTARY (0386);
- PARK RIDGE ELEMENTARY (0215);
- SHOSHONE MIDDLE (0294);
- PIONEER ELEMENTARY (0839)

- Math & ELA Growth data not available for 2020-2021.
- FPS = Future Public School
- CG = Custom Group
- The schools/districts within the custom comparison group outcomes have been averaged/aggregated

FUTURE PUBLIC SCHOOL FY21 ACADEMIC OUTCOMES COMPARISON

MOST RECENT YEAR: 2020-2021 LITERACY PROFICIENCY



- Students complete the statewide literacy assessment in the Fall and in the Spring.

Future Public School

Current Performance Certificate Term

RATING LEGEND	DOES NOT MEET STANDARD	APPROACHES STANDARD	MEETS STANDARD	EXCEEDS STANDARD	NOT RATED DUE TO PANDEMIC
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Historical Framework: Annual Outcomes 2017-2019

Year	2018-2019
Academic	CRITICAL
Operations	HONOR
Finance	HONOR

(Current) Revised Framework (2020): Annual Outcomes 2019-2021

Longitudinal Outcomes | Academic

YEAR	Math Proficiency	Math Growth	ELA Proficiency	ELA Growth	Literacy	College & Career Readiness
2019-2020	Not rated for 2019-2020	Not rated for 2019-2020	Not rated for 2019-2020	Not rated for 2019-2020	Not rated for 2019-2020	Not rated for 2019-2020
2020-2021	Not rated for 2019-2020	Not rated for 2019-2020	Not rated for 2019-2020	Not rated for 2019-2020	Not rated for 2019-2020	Not rated for 2019-2020

Longitudinal Outcomes | Operations

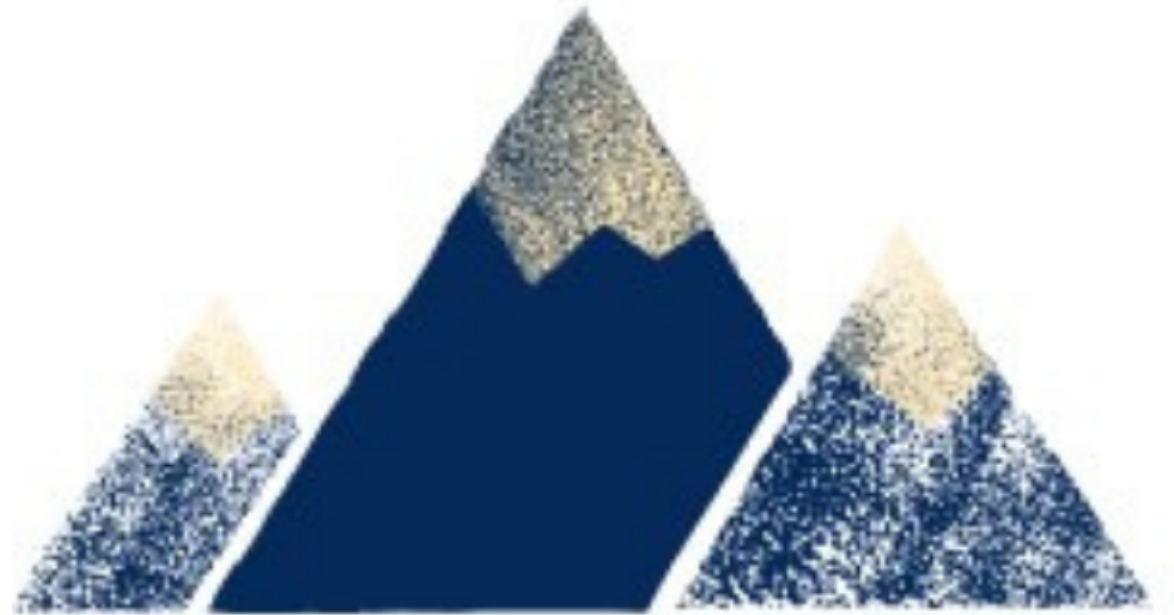
YEAR	Governance Structure	Governance Oversight	Governance Compliance	Student Services	Facility & Services	Data Security Informational Transparency	Operational Compliance
2019-2020	MEETS STANDARD	MEETS STANDARD	MEETS STANDARD	MEETS STANDARD	MEETS STANDARD	MEETS STANDARD	MEETS STANDARD
2020-2021	EXCEEDS STANDARD	EXCEEDS STANDARD	EXCEEDS STANDARD	EXCEEDS STANDARD	EXCEEDS STANDARD	EXCEEDS STANDARD	EXCEEDS STANDARD

Longitudinal Outcomes | Financial

YEAR	Current Ratio	Unrestricted Days Cash	Default	Enrollment Variance	Total Margin	Cash Flow	Debt to Service Coverage Ratio	Debt to Asset Ratio	Financial Compliance
2019-2020	MEETS STANDARD	MEETS STANDARD	MEETS STANDARD	APPROACHES STANDARD	MEETS STANDARD	MEETS STANDARD	MEETS STANDARD	MEETS STANDARD	MEETS STANDARD
2020-2021	Not rated for 2019-2020	Not rated for 2019-2020	Not rated for 2019-2020	Not rated for 2019-2020	Not rated for 2019-2020	Not rated for 2019-2020	Not rated for 2019-2020	Not rated for 2019-2020	Not rated for 2019-2020

*The school completed a minor amendment mid-term to transition to the IPCSC’s revised framework in 2020. Historical data is included to provide all annual outcomes of the school’s current performance certificate.

Falcon Ridge Public Charter School



Falcon Ridge Performance FY 21 Annual Report Snapshot

- IPCSC approved to waive Academic Ratings for the 2019-2020 & 2020-2021.
- IPCSC approved to waive Financial Outcome ratings for the 2020-2021 school year.
- GPM is on the historical framework.
- Outcomes presented are a “preview” of outcomes evaluated on the revised framework.
- **The school has been provided with both their historical framework annual report and a preview version of outcomes on the revised framework.*

ACADEMIC OUTCOMES:	
Math Proficiency	60%
Math Growth	Data Not Available for 2020-2021
ELA Proficiency	66%
ELA Growth	Data Not Available for 2020-2021
Literacy Proficiency	FALL IRI: 68% SPRING IRI: 75%

OPERATIONAL OUTCOMES: BOARD STEWARDSHIP	
Governance Structure	Exceeds Standard
Governance Oversight	Exceeds Standard
Governance Compliance	Exceeds Standard

OPERATIONAL OUTCOMES: MANAGEMENT	
Student Services	Approaches Standard
Data Security/Transparency	Meets Standard
Facility & Services	Exceeds Standard
Operational Compliance	Approaches Standard

FINANCIAL OUTCOMES: NEAR TERM MEASURES	
Current Ratio	.31
Unrestricted Days Cash	278
Default	None
Enrollment Variance	99.64%

FINANCIAL OUTCOMES: SUSTAINABILITY MEASURES	
Total Margin	TM: -5.82%
3 Yr. Aggregate Margin	3YR: 38.43%
Cash Flow	CF: -\$13,085
Multi-Year Cash Flow	MY: \$499,005
Debt Service Coverage Ratio	.51
Debt Asset Ratio	.54
Financial Compliance	Not Rated for 2020-2021

RATING LEGEND	DOES NOT MEET STANDARD	APPROACHES STANDARD	MEETS STANDARD	EXCEEDS STANDARD	NOT RATED DUE TO PANDEMIC
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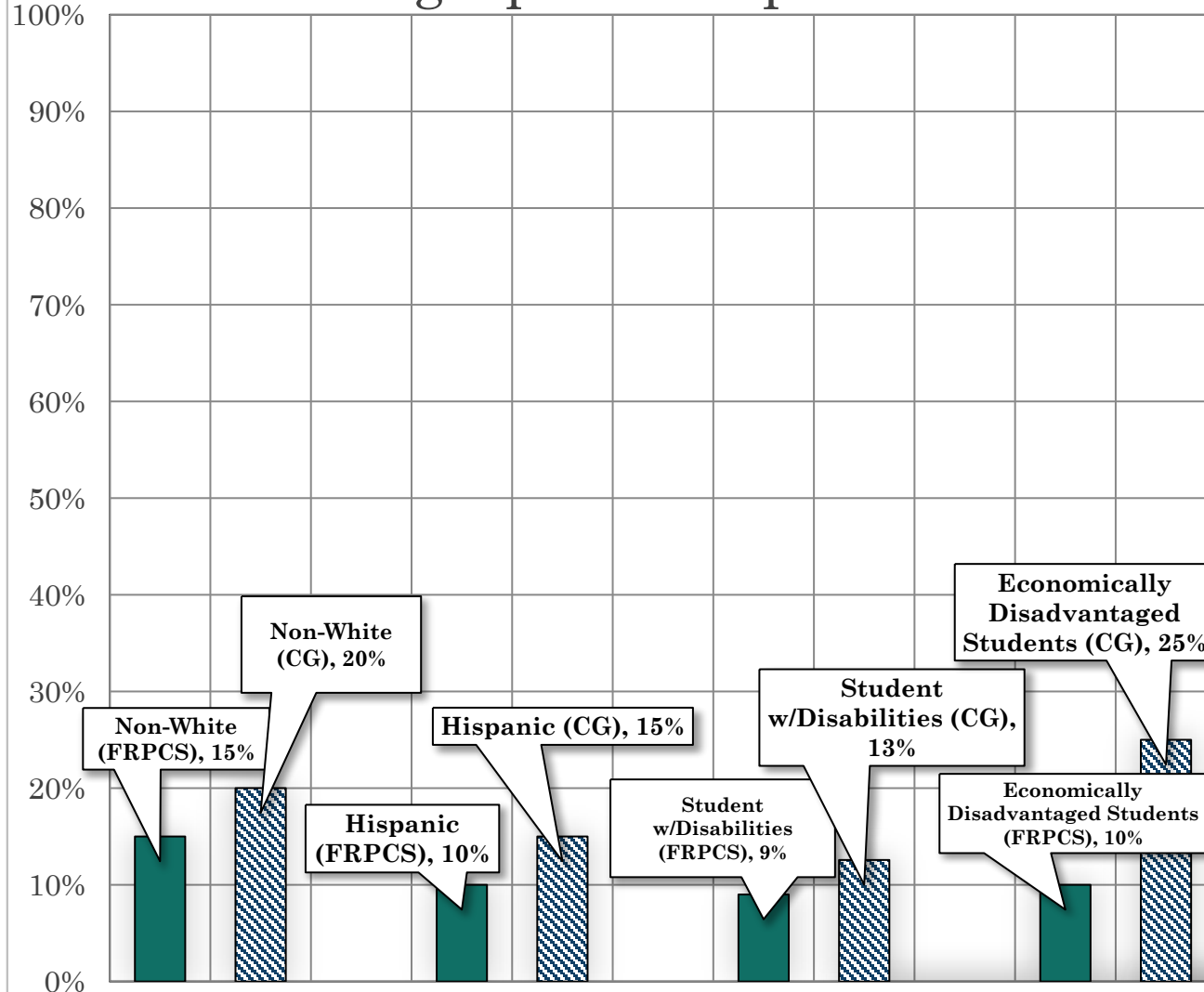
Falcon Ridge Public Charter School Comparison Group



■ Kuna School District (003)

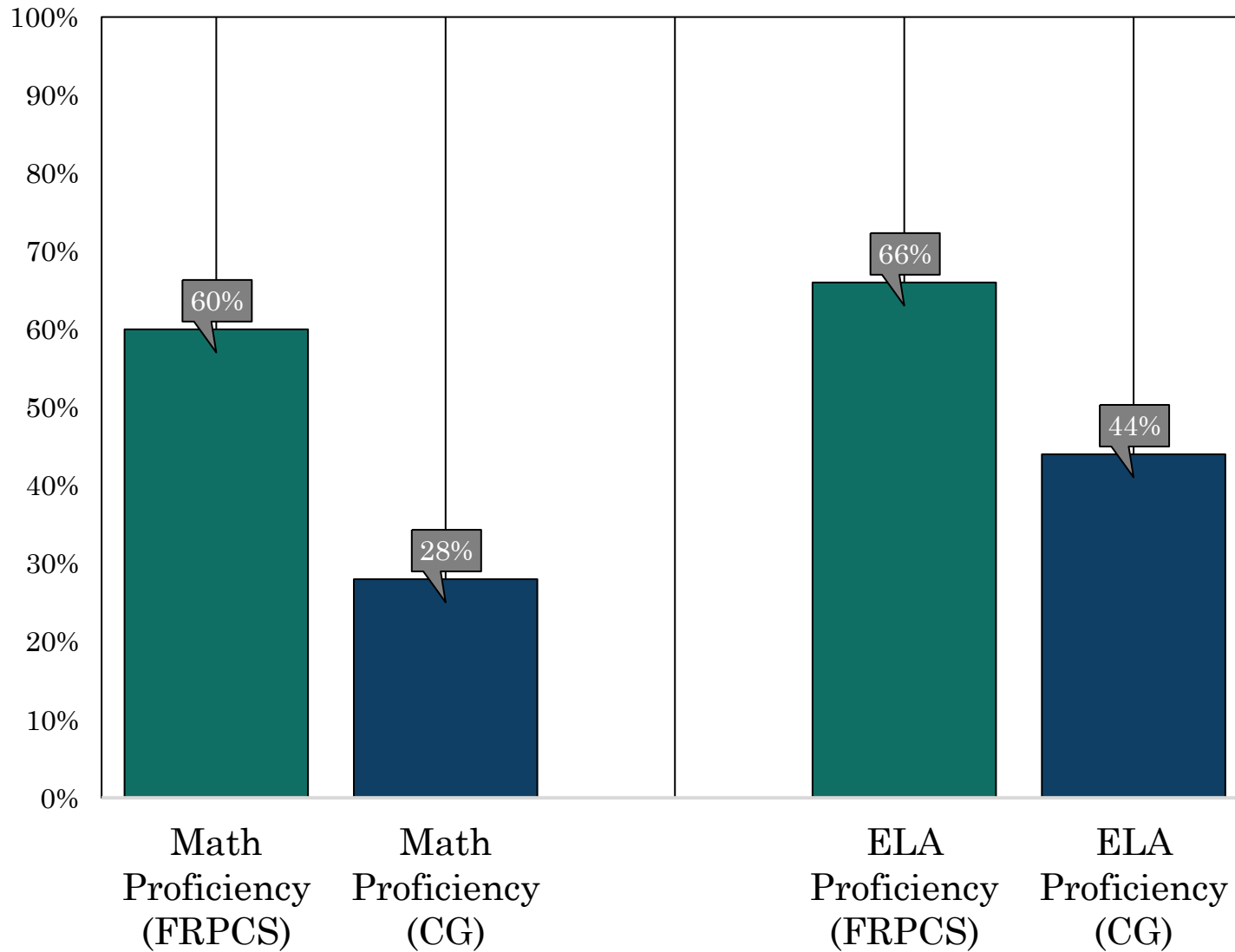
- Schools/districts included in a comparison group are based off similar school/district demographics.
- School and district demographic data is compiled from the State Department of Education reporting.

Falcon Ridge & Comparison Group Demographic Comparison FY21



- Demographic data is pulled from SDE Reporting
- The school's ability to meet standard is evaluated against their comparison group outcomes.

FALCON RIDGE PUBLIC CHARTER SCHOOL FY21 ACADEMIC OUTCOMES Comparison



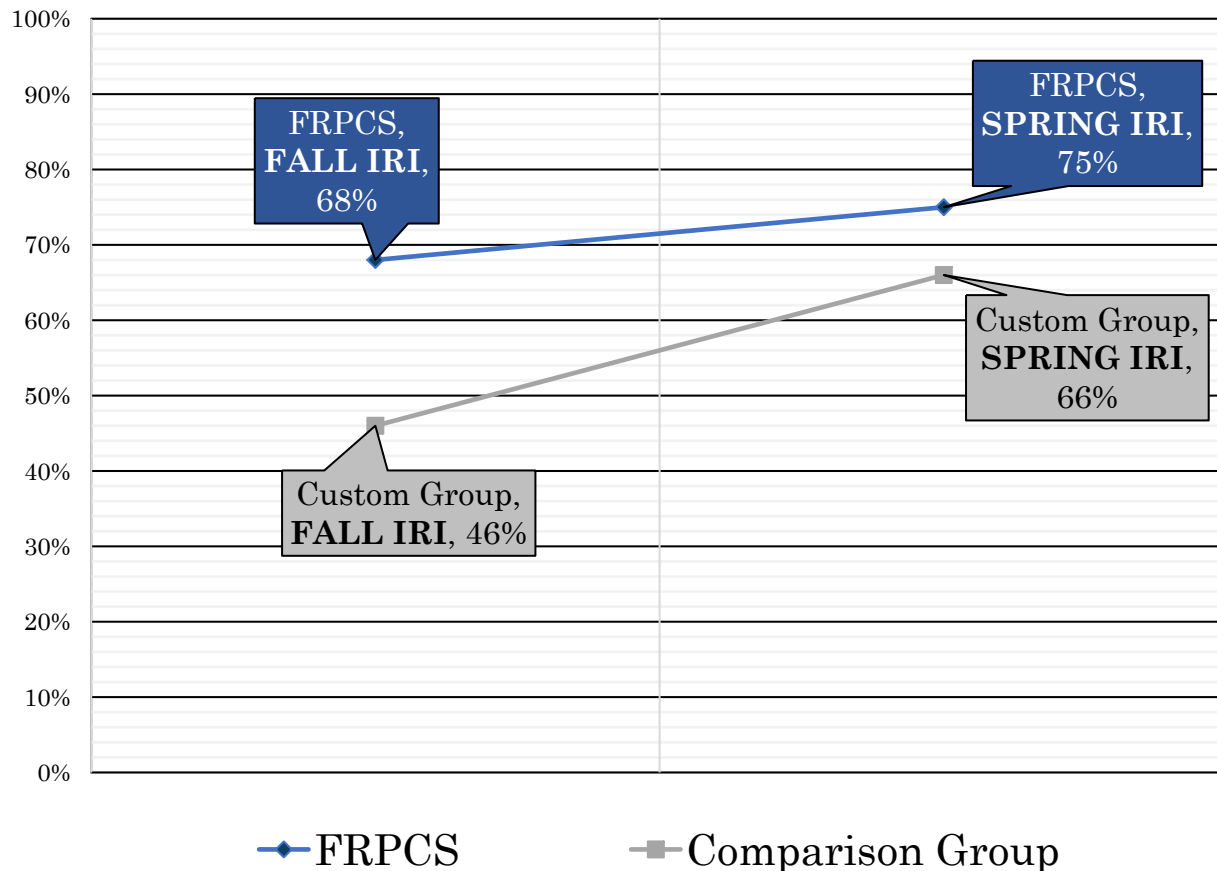
COMPARISON GROUP (CG):

- KUNA SCHOOL DISTRICT

- Math & ELA Growth data not available for 2020-2021.
- FRPCS = Falcon Ridge Public Charter School
- CG = Custom Group

FALCON RIDGE PUBLIC CHARTER SCHOOL FY21 ACADEMIC OUTCOMES COMPARISON

MOST RECENT YEAR: 2020-2021 LITERACY PROFICIENCY



- Students complete the statewide literacy assessment in the Fall and in the Spring.

Falcon Ridge Public Charter School

Current Performance Certificate Term

RATING LEGEND	DOES NOT MEET STANDARD	APPROACHES STANDARD	MEETS STANDARD	EXCEEDS STANDARD	NOT RATED DUE TO PANDEMIC
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Historical Framework: Annual Outcomes 2018-2021

Year	2018-2019	2019-2020
Academic	HONOR	NOT RATED DUE TO PANDEMIC
Operations	HONOR	HONOR
Finance	HONOR	HONOR

(Current) Revised Framework (2020): Annual Outcomes 2020-2021

Longitudinal Outcomes | Academic

YEAR	Math Proficiency	Math Growth	ELA Proficiency	ELA Growth	Literacy	College & Career Readiness
2020-2021	Not rated for 2020-2021	Not rated for 2020-2021	Not rated for 2020-2021	Not rated for 2020-2021	Not rated for 2020-2021	Not rated for 2020-2021

Longitudinal Outcomes | Operations

YEAR	Governance Structure	Governance Oversight	Governance Compliance	Student Services	Facility & Services	Data Security Informational Transparency	Operational Compliance
2020-2021	EXCEEDS STANDARD	EXCEEDS STANDARD	EXCEEDS STANDARD	APPROACHES STANDARD	MEETS STANDARD	EXCEEDS STANDARD	APPROACHES STANDARD

Longitudinal Outcomes | Financial

YEAR	Current Ratio	Unrestricted Days Cash	Default	Enrollment Variance	Total Margin	Cash Flow	Debt to Service Coverage Ratio	Debt to Asset Ratio	Financial Compliance
2020-2021	Not rated for 2020-2021	Not rated for 2020-2021	Not rated for 2020-2021	Not rated for 2020-2021	Not rated for 2020-2021	Not rated for 2020-2021	Not rated for 2020-2021	Not rated for 2020-2021	Not rated for 2020-2021

GEM PREP: Meridian



Gem Prep | Meridian Performance FY 21 Annual Report Snapshot

- IPCSC approved to waive Academic Ratings for the 2019-2020 & 2020-2021.
- IPCSC approved to waive Financial Outcome ratings for the 2020-2021 school year.
- GPM is on the historical framework.
- Outcomes presented are a “preview” of outcomes evaluated on the revised framework.
- **The school has been provided with both their historical framework annual report and a preview version of outcomes on the revised framework.*

ACADEMIC OUTCOMES:	
Math Proficiency	57%
Math Growth	Data Not Available for 2020-2021
ELA Proficiency	70%
ELA Growth	Data Not Available for 2020-2021
Literacy Proficiency	FALL IRI: 77% SPRING IRI: 76%

OPERATIONAL OUTCOMES: BOARD STEWARDSHIP	
Governance Structure	Exceeds Standard
Governance Oversight	Exceeds Standard
Governance Compliance	Exceeds Standard

OPERATIONAL OUTCOMES: MANAGEMENT	
Student Services	Exceeds Standard
Data Security/Transparency	Exceeds Standard
Facility & Services	Exceeds Standard
Operational Compliance	Exceeds Standard

FINANCIAL OUTCOMES: NEAR TERM MEASURES	
Current Ratio	11.86
Unrestricted Days Cash	175
Default	None
Enrollment Variance	97.01%

FINANCIAL OUTCOMES: SUSTAINABILITY MEASURES	
Total Margin	TM: 25.05%
3 Yr. Aggregate Margin	3YR: 22.00%
Cash Flow	CF: \$891,532
Multi-Year Cash Flow	MY: \$1,236,571
Debt Service Coverage Ratio	2.20
Debt Asset Ratio	.08
Financial Compliance	Not Rated for 2020-2021

RATING LEGEND	DOES NOT MEET STANDARD	APPROACHES STANDARD	MEETS STANDARD	EXCEEDS STANDARD	NOT RATED DUE TO PANDEMIC
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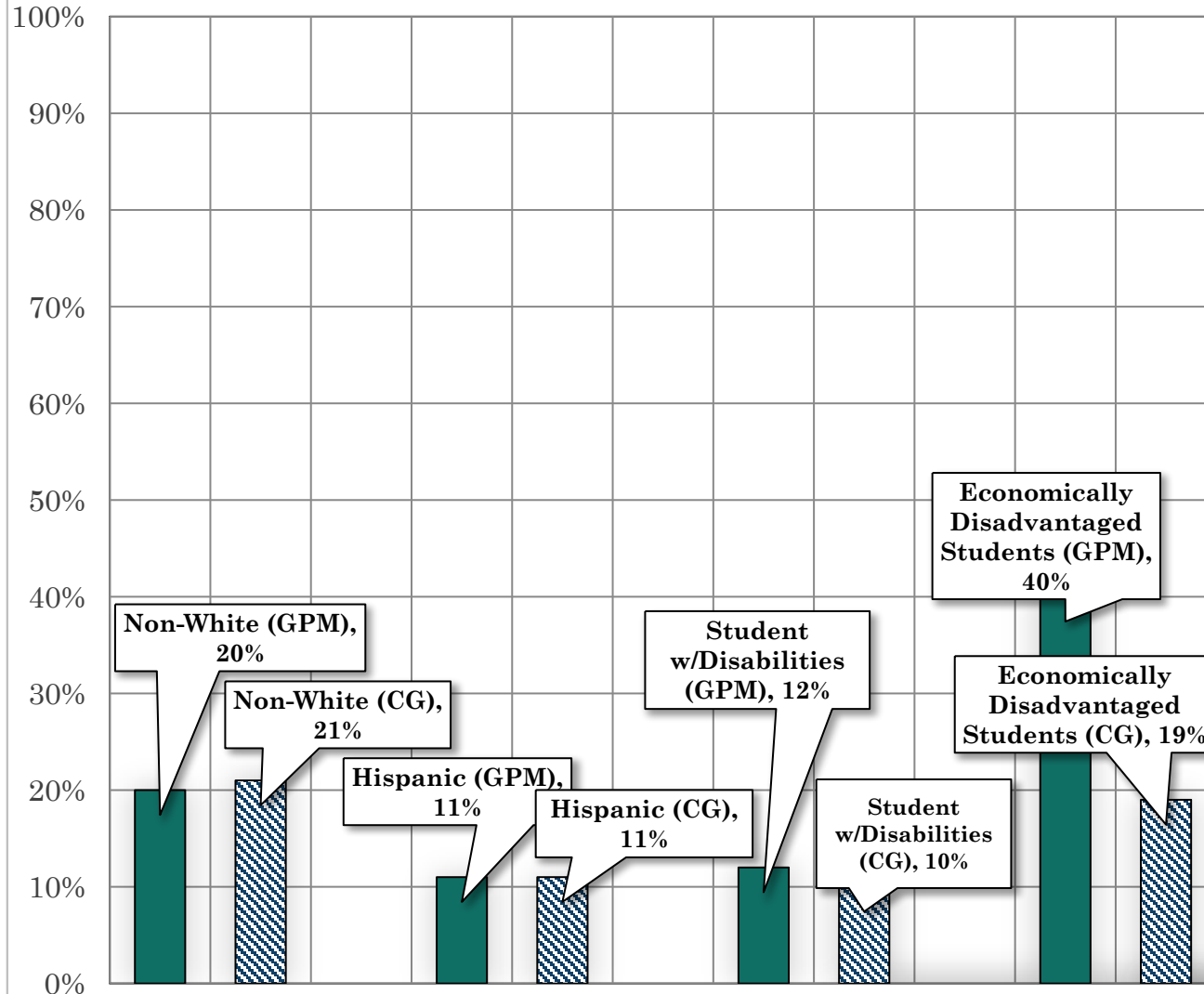
Gem Prep: Meridian Comparison Group



Joint School District (002)

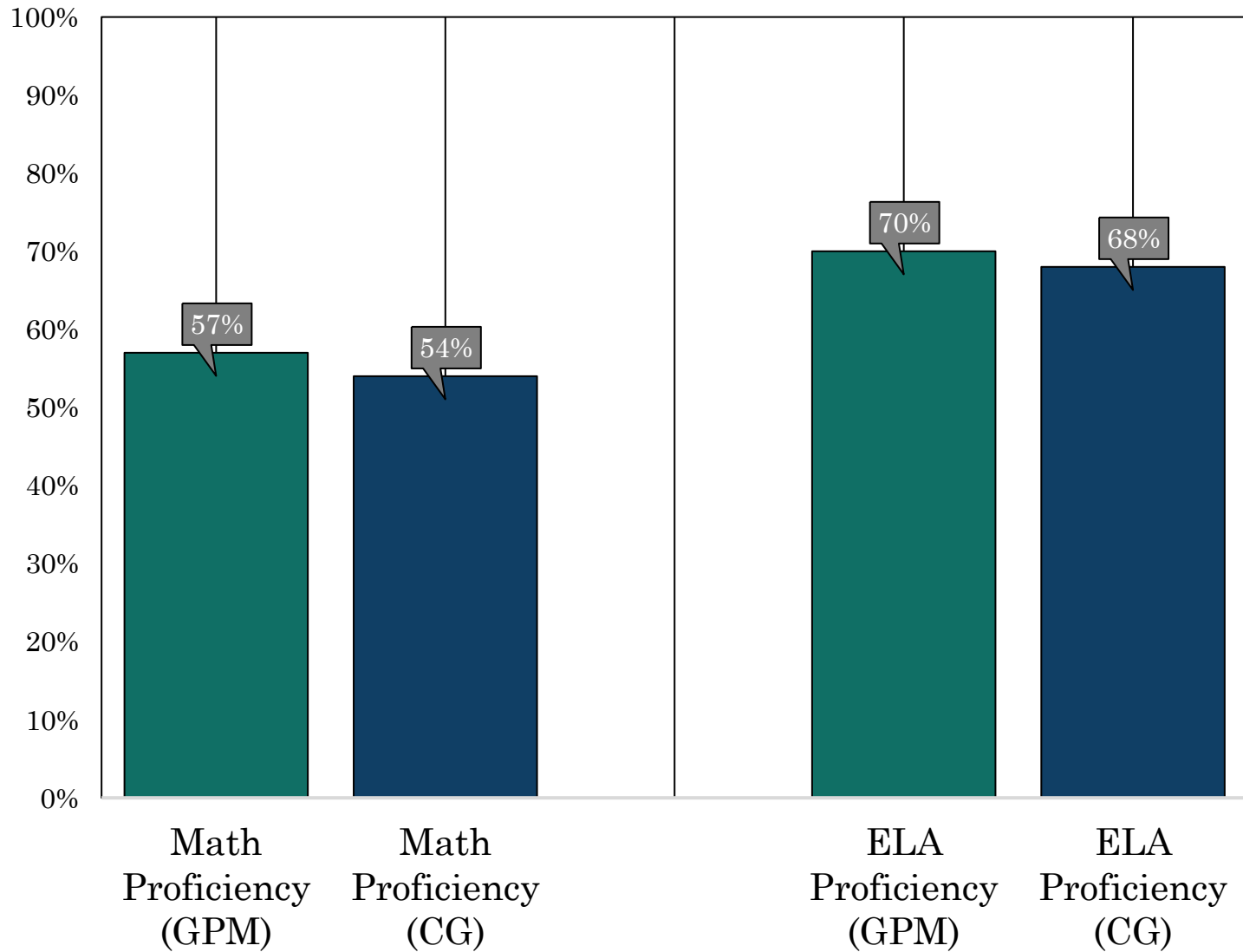
- Schools/districts included in a comparison group are based off similar school/district demographics.
- School and district demographic data is compiled from the State Department of Education reporting.

Gem Prep: Meridian & Comparison Group Demographic Comparison FY21



- Demographic data is pulled from SDE Reporting
- The school's ability to meet standard is evaluated against their comparison group outcomes.

GEM PREP: MERIDIAN FY21 ACADEMIC OUTCOMES Comparison



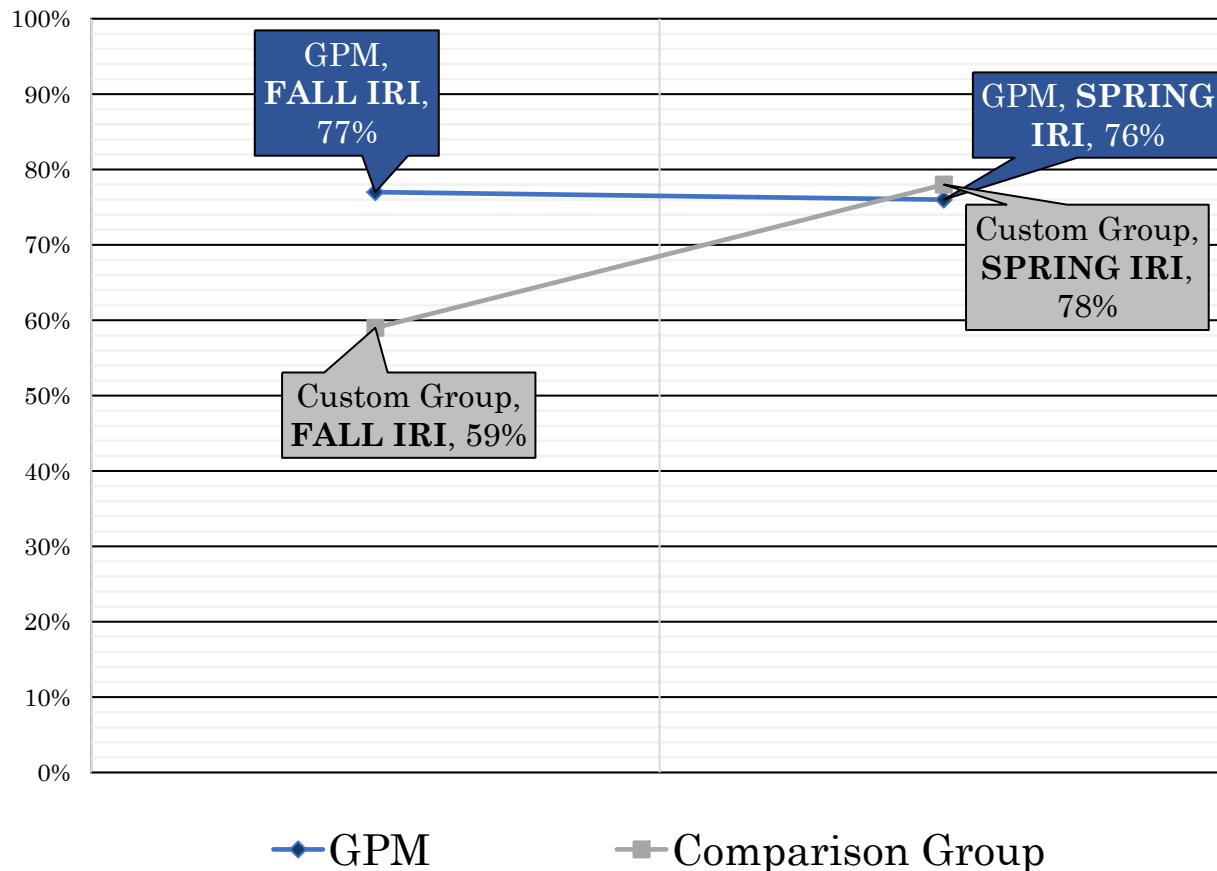
COMPARISON GROUP (CG):

- KUNA SCHOOL DISTRICT

- Math & ELA Growth data not available for 2020-2021.
- GPM = GEM PREP: Meridian
- CG = Custom Group

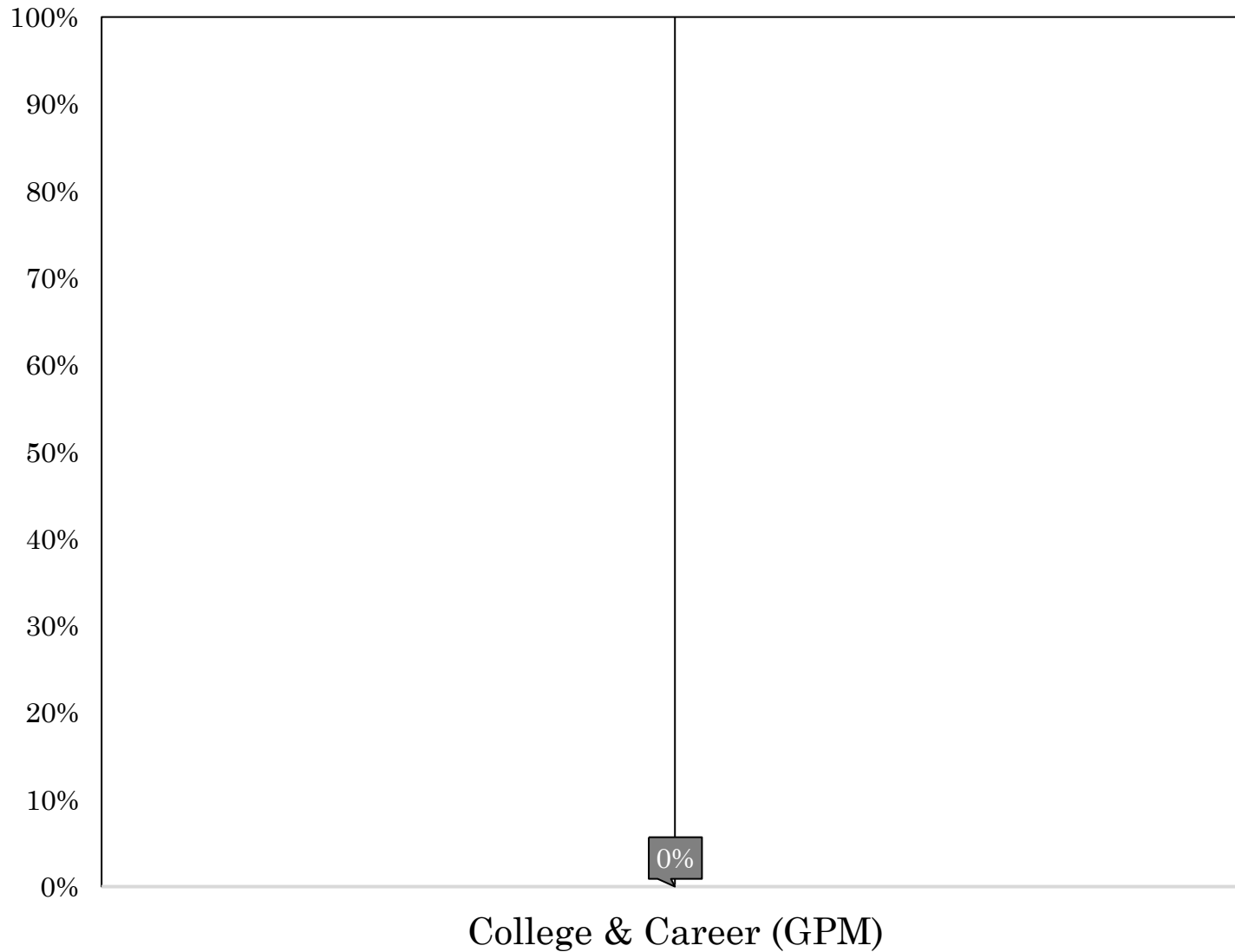
GEM PREP: MERIDIAN FY21 ACADEMIC OUTCOMES COMPARISON

MOST RECENT YEAR: 2020-2021 LITERACY PROFICIENCY



- Students complete the statewide literacy assessment in the Fall and in the Spring.

GEM PREP: MERIDIAN FY21 ACADEMIC OUTCOMES Comparison



COMPARISON GROUP (CG):

- KUNA SCHOOL DISTRICT

- College & Career Readiness data not available at the time IPCSC issued reports.
- GPM = GEM PREP: Meridian
- CG = Custom Group

GEM PREP: Meridian

Current Performance Certificate Term

RATING LEGEND	DOES NOT MEET STANDARD	APPROACHES STANDARD	MEETS STANDARD	EXCEEDS STANDARD	NOT RATED DUE TO PANDEMIC
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Historical Framework: Annual Outcomes 2018-2021

Year	2018-2019	2019-2020
Academic	GOOD STANDING	NOT RATED DUE TO PANDEMIC
Operations	HONOR	HONOR
Finance	HONOR	HONOR

(Current) Revised Framework (2020): Annual Outcomes 2020-2021

Longitudinal Outcomes | Academic

YEAR	Math Proficiency	Math Growth	ELA Proficiency	ELA Growth	Literacy	College & Career Readiness
2020-2021	Not rated for 2020-2021	Not rated for 2020-2021	Not rated for 2020-2021	Not rated for 2020-2021	Not rated for 2020-2021	Not rated for 2020-2021

Longitudinal Outcomes | Operations

YEAR	Governance Structure	Governance Oversight	Governance Compliance	Student Services	Facility & Services	Data Security Informational Transparency	Operational Compliance
2020-2021	EXCEEDS STANDARD	EXCEEDS STANDARD	EXCEEDS STANDARD	EXCEEDS STANDARD	EXCEEDS STANDARD	EXCEEDS STANDARD	EXCEEDS STANDARD

Longitudinal Outcomes | Financial

YEAR	Current Ratio	Unrestricted Days Cash	Default	Enrollment Variance	Total Margin	Cash Flow	Debt to Service Coverage Ratio	Debt to Asset Ratio	Financial Compliance
2020-2021	Not rated for 2020-2021	Not rated for 2020-2021	Not rated for 2020-2021	Not rated for 2020-2021	Not rated for 2020-2021	Not rated for 2020-2021	Not rated for 2020-2021	Not rated for 2020-2021	Not rated for 2020-2021

Heritage Community Charter School



Heritage Community Charter School

Performance FY 21 Annual Report Snapshot

- IPCSC approved to waive Academic Ratings for the 2019-2020 & 2020-2021.
- IPCSC approved to waive Financial Outcome ratings for the 2020-2021 school year.
- HCCS is on year (2) of the revised framework (2020) and custom comparison group.

ACADEMIC OUTCOMES:	
Math Proficiency	20%
Math Growth	Data Not Available for 2020-2021
ELA Proficiency	42%
ELA Growth	Data Not Available for 2020-2021
Literacy Proficiency	FALL IRI: 34% SPRING IRI: 50%

OPERATIONAL OUTCOMES: BOARD STEWARDSHIP	
Governance Structure	Exceeds Standard
Governance Oversight	Exceeds Standard
Governance Compliance	Exceeds Standard

OPERATIONAL OUTCOMES: MANAGEMENT	
Student Services	Exceeds Standard
Data Security/Transparency	Exceeds Standard
Facility & Services	Exceeds Standard
Operational Compliance	Exceeds Standard

FINANCIAL OUTCOMES: NEAR TERM MEASURES	
Current Ratio	2.50
Unrestricted Days Cash	240
Default	None
Enrollment Variance	94.03%

FINANCIAL OUTCOMES: SUSTAINABILITY MEASURES	
Total Margin	TM: 4.73%
3 Yr. Aggregate Margin	3YR: 10.93%
Cash Flow	CF: \$373,075
Multi-Year Cash Flow	MY: \$1,615,219
Debt Service Coverage Ratio	1.44
Debt Asset Ratio	.86
Financial Compliance	Not Rated for 2020-2021

RATING LEGEND	DOES NOT MEET STANDARD	APPROACHES STANDARD	MEETS STANDARD	EXCEEDS STANDARD	NOT RATED DUE TO PANDEMIC
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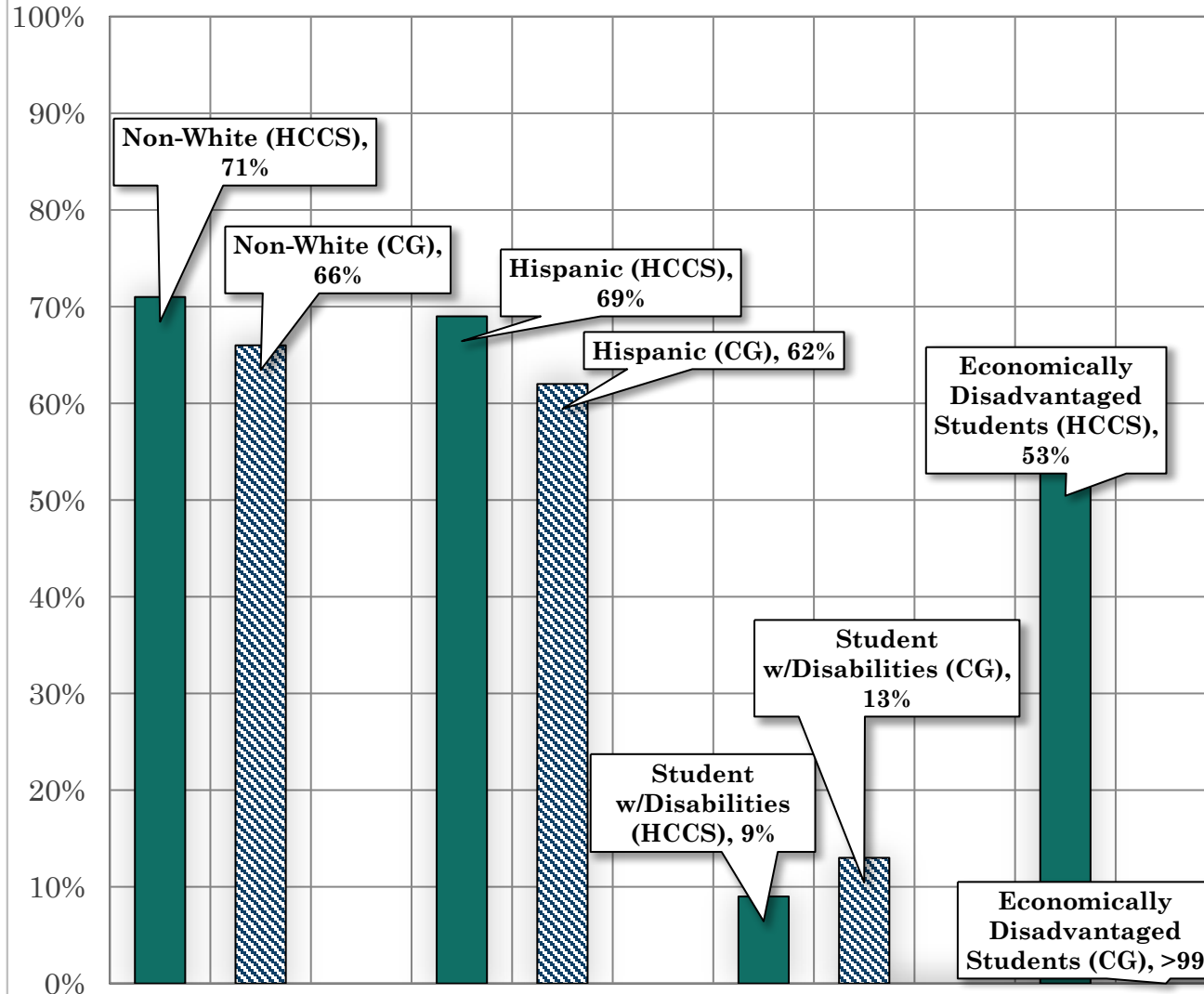
Heritage Community Charter School Comparison Group



Caldwell School District (132)

- Schools/districts included in a comparison group are based off similar school/district demographics.
- School and district demographic data is compiled from the State Department of Education reporting.

HCCS & Comparison Group Demographic Comparison FY21

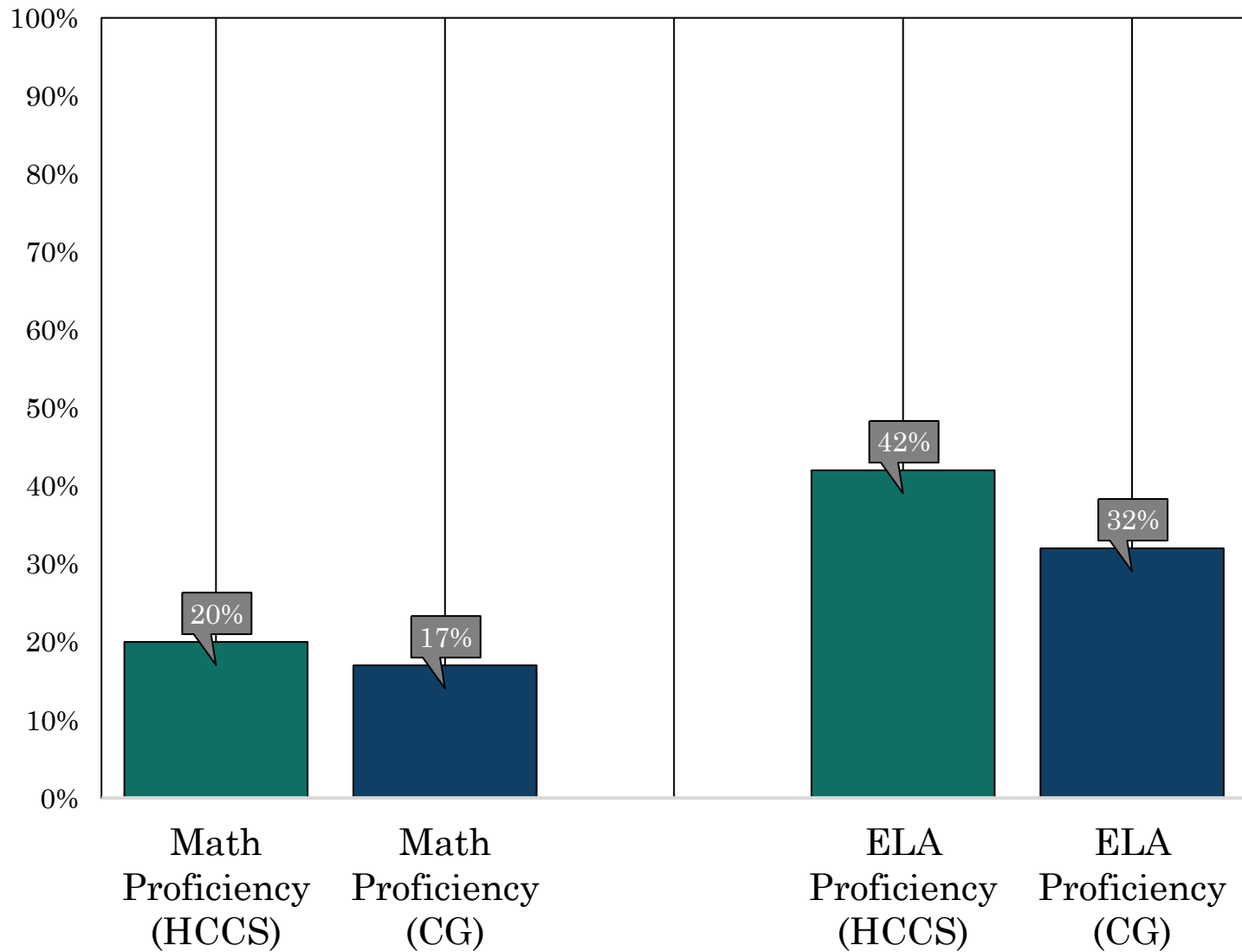


- Demographic data is pulled from SDE Reporting
- The school's ability to meet standard is evaluated against their comparison group outcomes.

HCCS = Heritage Community Charter School

- CG = Custom Group

HERITAGE COMMUNITY CHARTER SCHOOL FY21 ACADEMIC OUTCOMES Comparison



COMPARISON GROUP (CG):

- CALDWELL SCHOOL DISTRICT (132)

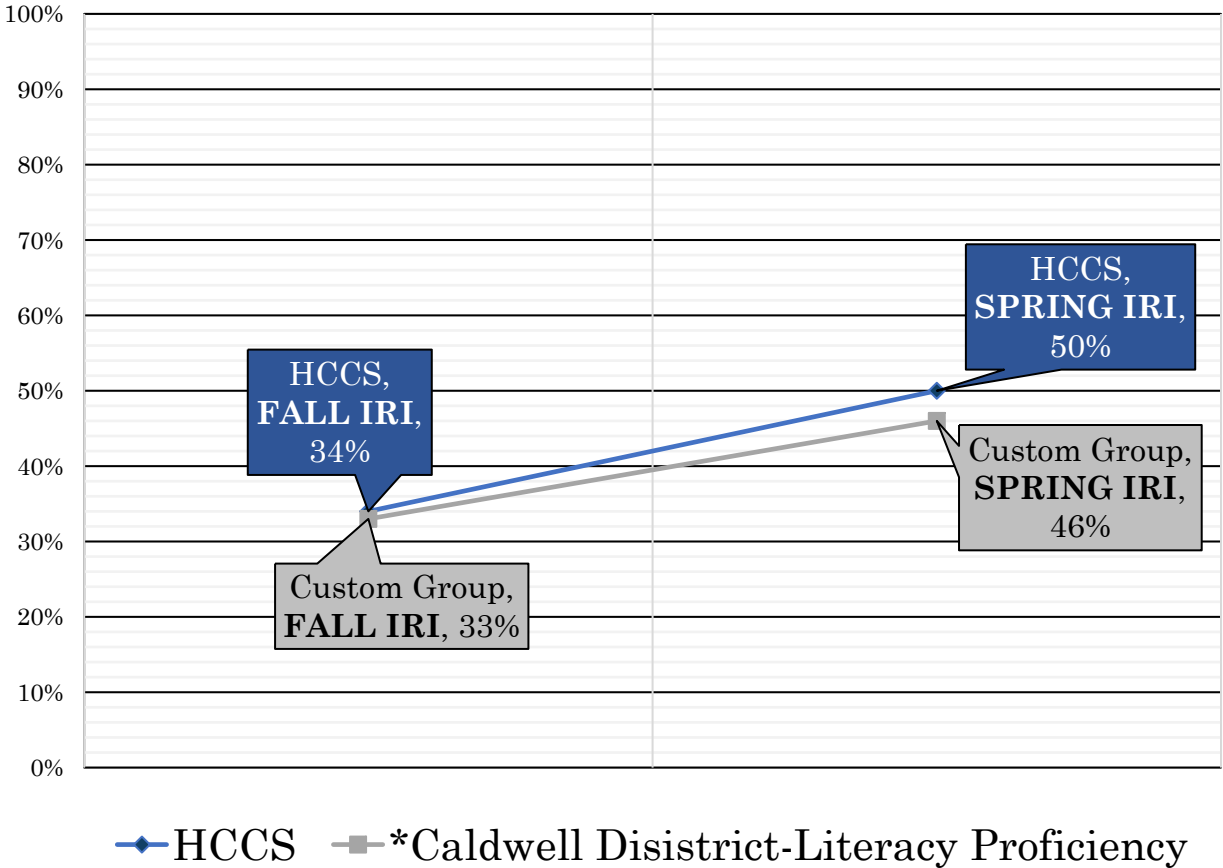
- Math & ELA Growth data not available for 2020-2021.

HCCS = Heritage Community Charter School

CG = Custom Group

HERITAGE COMMUNITY CHARTER SCHOOL FY21 ACADEMIC OUTCOMES COMPARISON

MOST RECENT YEAR: 2020-2021 LITERACY PROFICIENCY



- Students complete the statewide literacy assessment in the Fall and in the Spring.

Heritage Community Charter School

Current Performance Certificate Term

RATING LEGEND	DOES NOT MEET STANDARD	APPROACHES STANDARD	MEETS STANDARD	EXCEEDS STANDARD	NOT RATED DUE TO PANDEMIC
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Historical Framework: Annual Outcomes 2018-2019

Year	2018-2019
Academic	REMEDATION
Operations	HONOR
Finance	HONOR

(Current) Revised Framework (2020): Annual Outcomes 2020-2021

Longitudinal Outcomes | Academic

YEAR	Math Proficiency	Math Growth	ELA Proficiency	ELA Growth	Literacy	College & Career Readiness
2019-2020	Not rated for 2019-2020	Not rated for 2019-2020	Not rated for 2019-2020	Not rated for 2019-2020	Not rated for 2019-2020	Not rated for 2019-2020
2020-2021	Not rated for 2019-2020	Not rated for 2019-2020	Not rated for 2019-2020	Not rated for 2019-2020	Not rated for 2019-2020	Not rated for 2019-2020

Longitudinal Outcomes | Operations

YEAR	Governance Structure	Governance Oversight	Governance Compliance	Student Services	Facility & Services	Data Security Informational Transparency	Operational Compliance
2019-2020	EXCEEDS STANDARD	MEETS STANDARD	EXCEEDS STANDARD	EXCEEDS STANDARD	EXCEEDS STANDARD	EXCEEDS STANDARD	EXCEEDS STANDARD
2020-2021	EXCEEDS STANDARD	EXCEEDS STANDARD	EXCEEDS STANDARD	EXCEEDS STANDARD	EXCEEDS STANDARD	EXCEEDS STANDARD	EXCEEDS STANDARD

Longitudinal Outcomes | Financial

YEAR	Current Ratio	Unrestricted Days Cash	Default	Enrollment Variance	Total Margin	Cash Flow	Debt to Service Coverage Ratio	Debt to Asset Ratio	Financial Compliance
2019-2020	EXCEEDS STANDARD	EXCEEDS STANDARD	EXCEEDS STANDARD	APPROACHES STANDARD	MEETS STANDARD	MEETS STANDARD	EXCEEDS STANDARD	APPROACHES STANDARD	MEETS STANDARD
2020-2021	Not rated for 2020-2021	Not rated for 2020-2021	Not rated for 2020-2021	Not rated for 2020-2021	Not rated for 2020-2021	Not rated for 2020-2021	Not rated for 2020-2021	Not rated for 2020-2021	Not rated for 2020-2021

Idaho Science & Technology Charter School



Idaho Science & Technology Charter School Performance FY 21 Annual Report Snapshot

- IPCSC approved to waive Academic Ratings for the 2019-2020 & 2020-2021.
- IPCSC approved to waive Financial Outcome ratings for the 2020-2021 school year.
- ISTCS is on the historical framework.
- Outcomes presented are a “preview” of outcomes evaluated on the revised framework.
- **The school has been provided with both their historical framework annual report and a preview version of outcomes on the revised framework.*

ACADEMIC OUTCOMES:	
Math Proficiency	28%
Math Growth	Data Not Available for 2020-2021
ELA Proficiency	42%
ELA Growth	Data Not Available for 2020-2021
Literacy Proficiency	FALL IRI: 48% SPRING IRI: 50%

OPERATIONAL OUTCOMES: BOARD STEWARDSHIP	
Governance Structure	Exceeds Standard
Governance Oversight	Exceeds Standard
Governance Compliance	Exceeds Standard

OPERATIONAL OUTCOMES: MANAGEMENT	
Student Services	Exceeds Standard
Data Security/Transparency	Approaches Standard
Facility & Services	Exceeds Standard
Operational Compliance	Exceeds Standard

RATING LEGEND	DOES NOT MEET STANDARD	APPROACHES STANDARD	MEETS STANDARD	EXCEEDS STANDARD	NOT RATED DUE TO PANDEMIC
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FINANCIAL OUTCOMES: NEAR TERM MEASURES	
Current Ratio	1.18
Unrestricted Days Cash	87
Default	None
Enrollment Variance	100.32%

FINANCIAL OUTCOMES: SUSTAINABILITY MEASURES	
Total Margin	TM: 3.17%
3 Yr. Aggregate Margin	3YR: 18.57%
Cash Flow	CF: \$123,717
Multi-Year Cash Flow	MY: \$491,701
Debt Service Coverage Ratio	1.17
Debt Asset Ratio	.12
Financial Compliance	Not Rated for 2020-2021

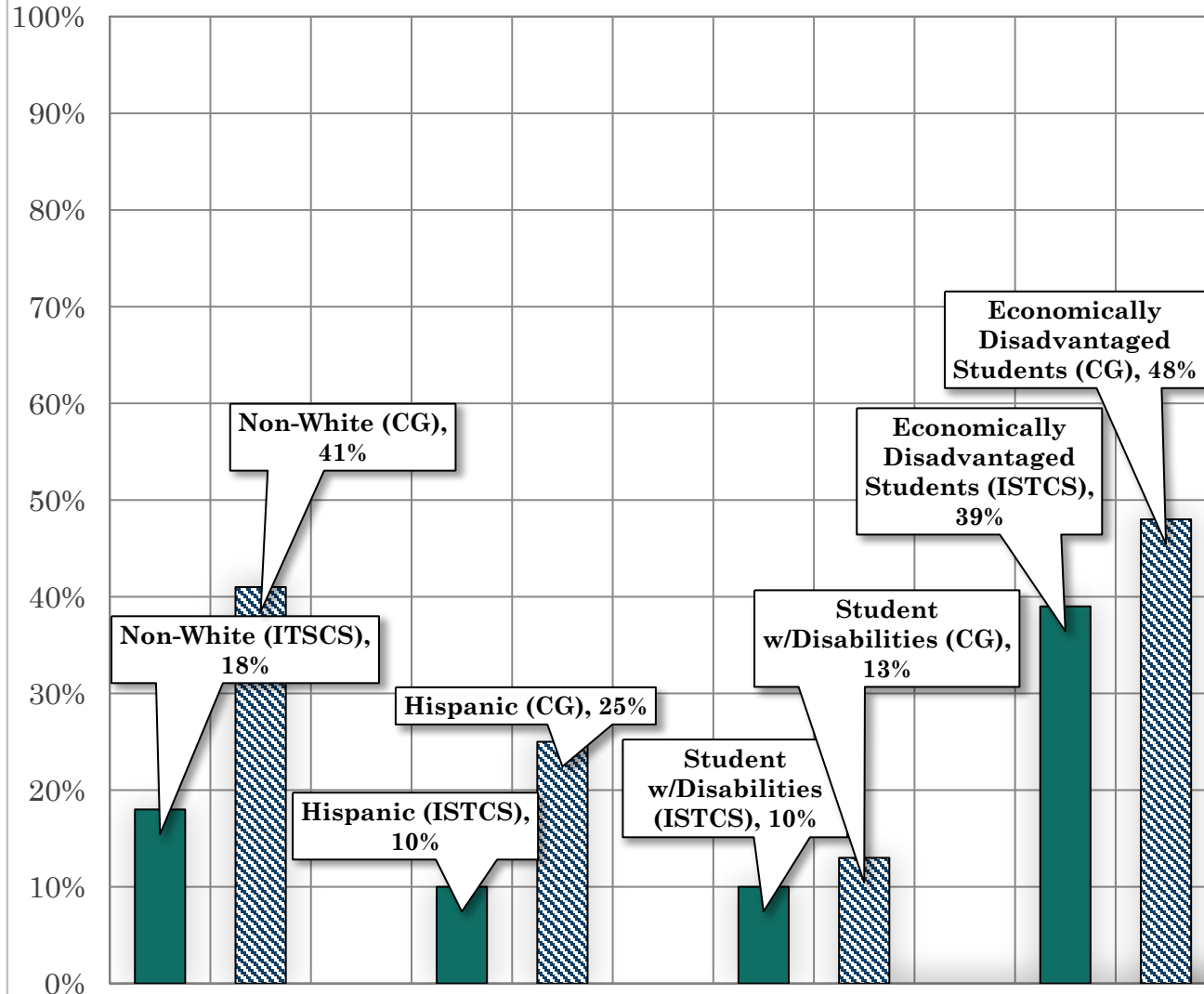
Idaho Science & Technology Charter School Comparison Group



Blackfoot School District (055)

- Schools/districts included in a comparison group are based off similar school/district demographics.
- School and district demographic data is compiled from the State Department of Education reporting.

ISTCS & Comparison Group Demographic Comparison FY21

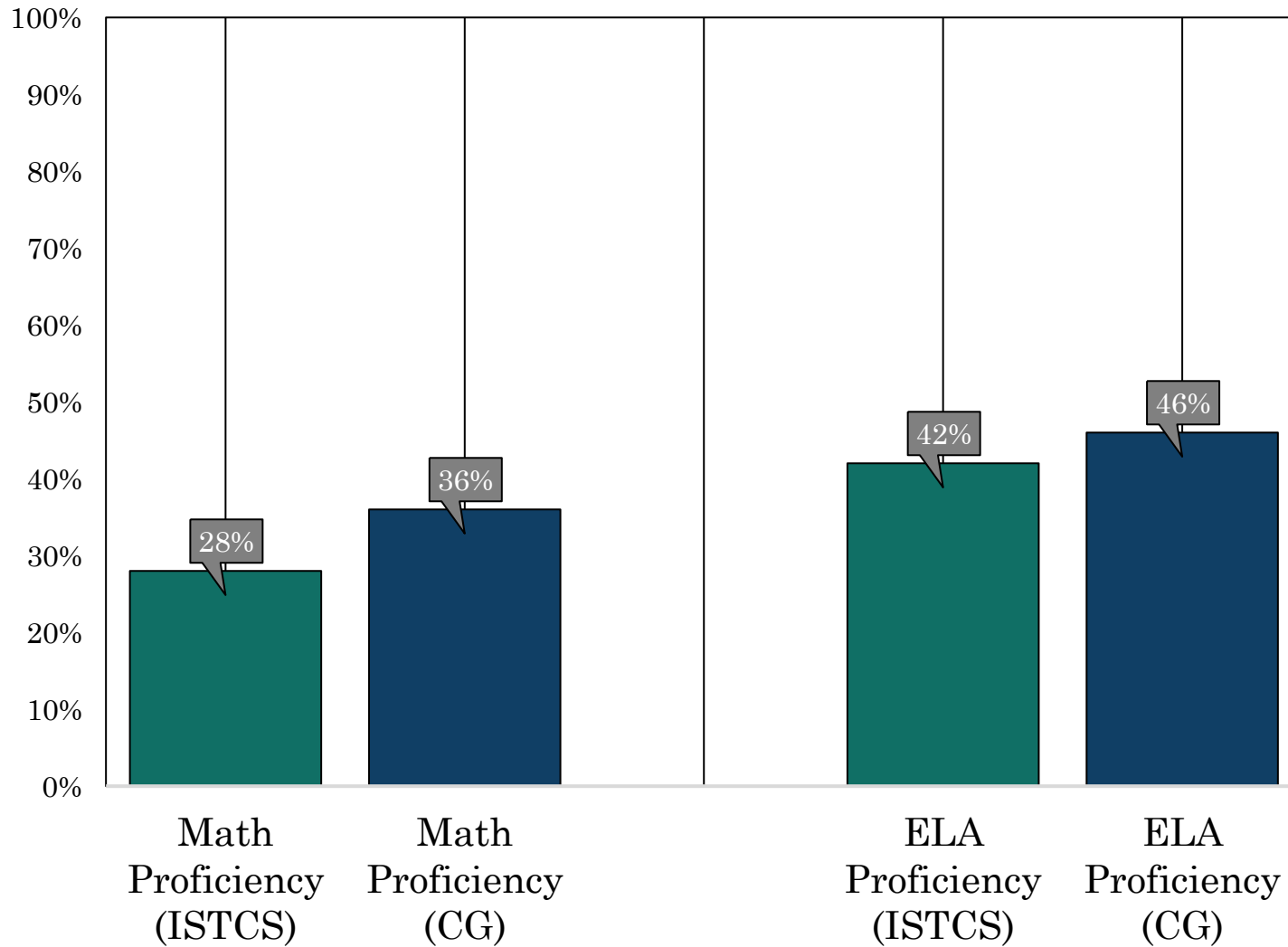


- Demographic data is pulled from SDE Reporting
- The school's ability to meet standard is evaluated against their comparison group outcomes.

**ISTCS = Idaho Science & Technology
Charter School**

- CG = Custom Group

IDAHO SCIENCE & TECHNOLOGY
Charter school
FY21 ACADEMIC OUTCOMES Comparison



COMPARISON GROUP (CG):

- CALDWELL SCHOOL DISTRICT (132)

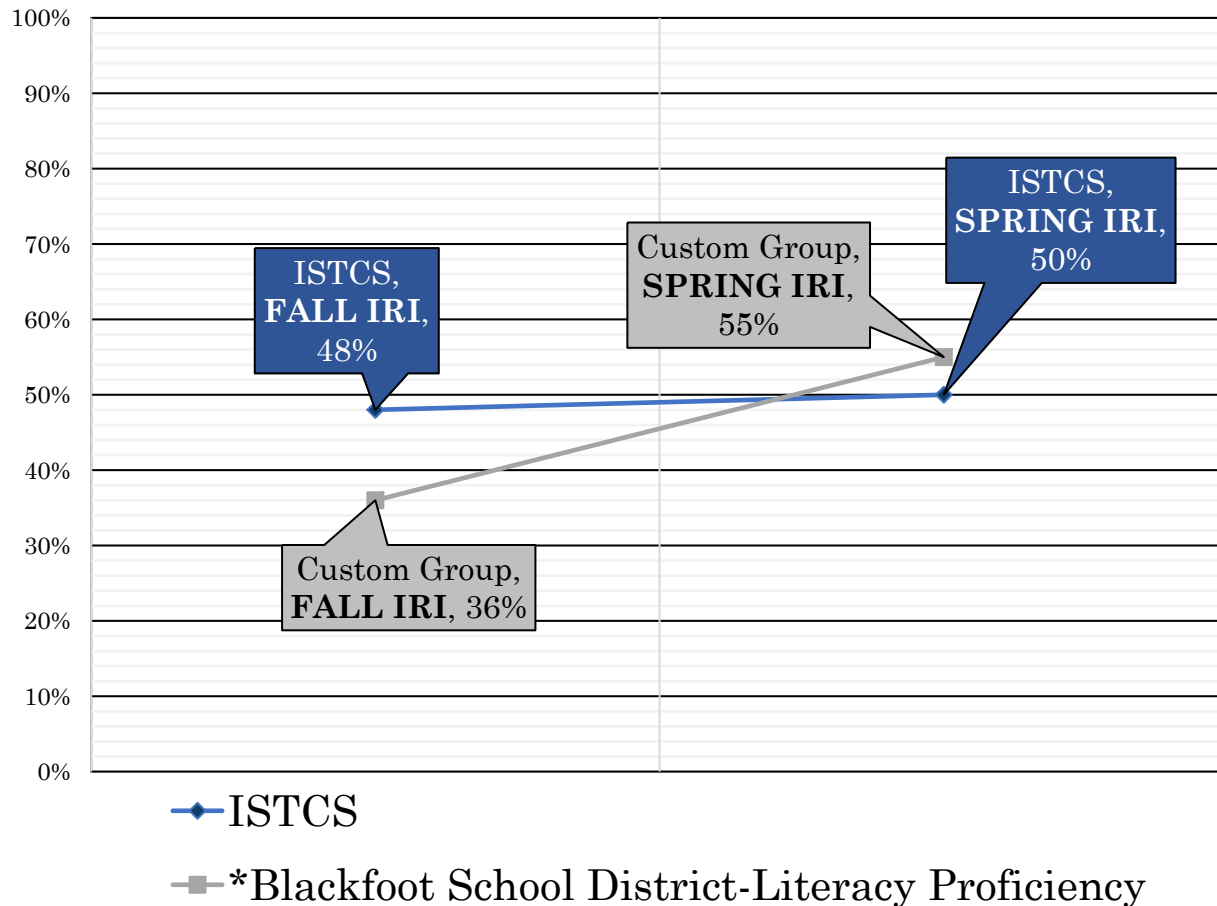
- Math & ELA Growth data not available for 2020-2021.

ISTCS = Idaho Science & Technology Charter School

CG = Custom Group

IDAHO SCIENCE & TECHNOLOGY CHARTER SCHOOL FY21 ACADEMIC OUTCOMES COMPARISON

MOST RECENT YEAR: 2020-2021 LITERACY PROFICIENCY



- Students complete the statewide literacy assessment in the Fall and in the Spring.

Idaho Science & Technology Charter School

Current Performance Certificate Term

RATING LEGEND	DOES NOT MEET STANDARD	APPROACHES STANDARD	MEETS STANDARD	EXCEEDS STANDARD	NOT RATED DUE TO PANDEMIC
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Historical Framework: Annual Outcomes 2018-2019			
Year	2018-2019		2019-2020
Academic	CRITICAL		NOT RATED DUE TO PANDEMIC
Operations	HONOR		HONOR
Finance	HONOR		HONOR

(Current) Revised Framework (2020): Annual Outcomes 2020-2021

Longitudinal Outcomes | Academic

YEAR	Math Proficiency	Math Growth	ELA Proficiency	ELA Growth	Literacy	College & Career Readiness
2020-2021	Not rated for 2019-2020	Not rated for 2019-2020	Not rated for 2019-2020	Not rated for 2019-2020	Not rated for 2019-2020	Not rated for 2019-2020

Longitudinal Outcomes | Operations

YEAR	Governance Structure	Governance Oversight	Governance Compliance	Student Services	Facility & Services	Data Security Informational Transparency	Operational Compliance
2020-2021	EXCEEDS STANDARD	EXCEEDS STANDARD	EXCEEDS STANDARD	EXCEEDS STANDARD	EXCEEDS STANDARD	APPROACHES STANDARD	EXCEEDS STANDARD

Longitudinal Outcomes | Financial

YEAR	Current Ratio	Unrestricted Days Cash	Default	Enrollment Variance	Total Margin	Cash Flow	Debt to Service Coverage Ratio	Debt to Asset Ratio	Financial Compliance
2020-2021	Not rated for 2020-2021	Not rated for 2020-2021	Not rated for 2020-2021	Not rated for 2020-2021	Not rated for 2020-2021	Not rated for 2020-2021	Not rated for 2020-2021	Not rated for 2020-2021	Not rated for 2020-2021



Annual Performance Report 2021

Falcon Ridge Public Charter School

Mission Statement: The mission of the school is as follows: Developing students who are competent, productive and responsible by promoting the academic skills and character to succeed in life.

Chair/President	Kim Schwisow
Treasurer	David Peterson
Secretary	Tanya Ambler
Administrator	Christie Jorgensen
Business Manager	Alice Heida
School Location	278 S. Ten Mile Road Kuna
School Phone	208-282-2822

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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 includes a framework describing the expectations the school must meet in order to earn a next operational term. It also requires that charter school authorizer's complete performance reports for the schools they oversee each year. The annual performance report serves the following purposes:

1. To provide transparent information about charter school quality to the public;
2. To ensure charter school boards have access to clear expectations and;
3. To inform mid-term authorizing decisions.

This report 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.

Each measure included in the IPCSC'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, the IPCSC has suspended ratings (exceeds, meets, etc.) on academic and financial measures for the FY21 report. All outcomes are included in this report; however, outcomes are not rated.

Falcon Ridge Public Charter School Performance Certificate: [FRPCS Performance Certificate](#)

Performance Certificate: [IPCSC Performance Framework](#)

Current Term: 2018 - 2023

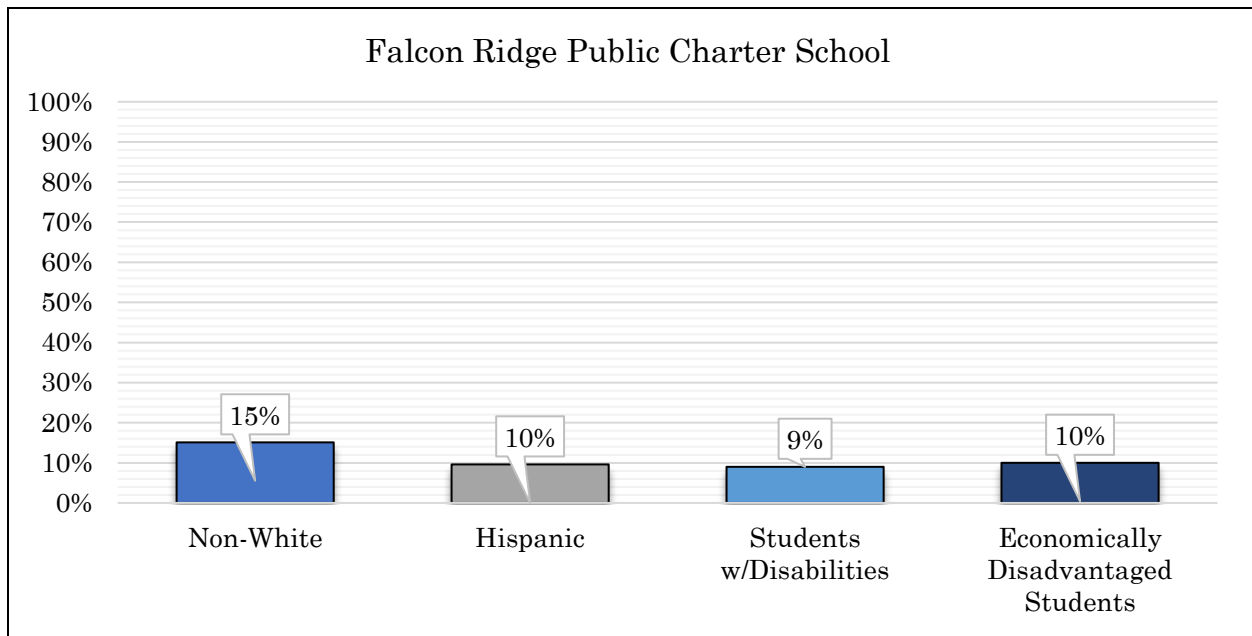
School Overview

Model:	Direct Instruction
Enrollment Capacity:	279
Grades Served:	K-8
Enrollment Projected FY22:	275

Key Design Elements:

- Establish a learning environment that is safe both emotionally and physically.
- Incorporate a “teach to the ceiling” philosophy towards ensuring that all students are challenged academically.
- Set high behavioral expectations with a focus on kindness and respect for others.
- Establish an atmosphere that encourages student participation and engagement
- Maintain a culture that values work ethic, personal responsibility and those habits that lead to a productive citizenry.

2021 FALCON RIDGE PUBLIC CHARTER SCHOOL DEMOGRAPHIC SUMMARY:



2020-2021 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.

RATING LEGEND	DOES NOT MEET STANDARD	APPROACHES STANDARD	MEETS STANDARD	EXCEEDS STANDARD	NOT RATED DUE TO PANDEMIC
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ACADEMIC OUTCOMES:	
Math Proficiency	60%
Math Growth	<i>Data Not Available for 2020-2021</i>
ELA Proficiency	66%
ELA Growth	<i>Data Not Available for 2020-2021</i>
Literacy Proficiency	FALL IRI: 68% SPRING IRI: 75%

FINANCIAL OUTCOMES: NEAR TERM MEASURES	
Current Ratio	.31
Unrestricted Days Cash	278
Default	None
Enrollment Variance	99.64%

OPERATIONAL OUTCOMES: BOARD STEWARDSHIP	
Governance Structure	EXCEEDS STANDARD
Governance Oversight	EXCEEDS STANDARD
Governance Compliance	EXCEEDS STANDARD

OPERATIONAL OUTCOMES: MANAGEMENT	
Student Services	APPROACHES STANDARD
Data Security/Transparency	MEETS STANDARD
Facility & Services	EXCEEDS STANDARD
Operational Compliance	APPROACHES STANDARD

FINANCIAL OUTCOMES: SUSTAINABILITY MEASURES	
Total Margin	TM: -5.82%
3 Yr. Aggregate Margin	3YR: 38.43%
Cash Flow	CF: -\$13085
Multi-Year Cash Flow	MY: \$499,005
Debt Service Coverage Ratio	.51
Debt Asset Ratio	.54
Financial Compliance	Not Rated for 2020-2021

Note: Due to the impact of the pandemic, Academic outcomes were not available for the 2019-2020 school year. Academic outcomes are available but will not be rated for the 2020-2021 school year.

Academic Outcomes

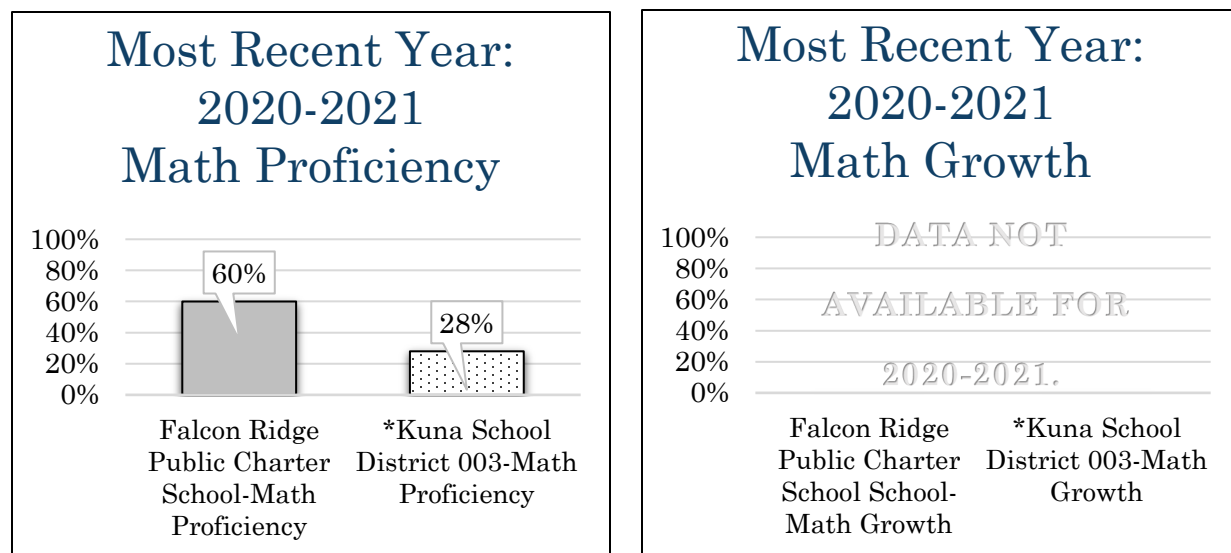
MATH PROFICIENCY & MATH GROWTH

Why This Matters:

The IPCSC must determine whether the academic performance at the school represents a favorable return on the investment of public dollars. For context, the IPCSC considers the school's performance in relation to other educational choices available to families. A school that performs as well or better than the average of its comparison group on the statewide mathematics assessment (ISAT) meets the IPCSC standard on both the math proficiency and math growth measures.

If this standard is not yet met, the school should focus its strategic planning on improving mathematics achievement outcomes to ensure the school will earn a next operational term. If the standard is met, strategic planning may focus on whatever data points will best establish and sustain an exemplary school of the specific model for which the school is chartered.

Comparison Group: Kuna District (003)



RATING LEGEND	DOES NOT MEET STANDARD	APPROACHES STANDARD	MEETS STANDARD	EXCEEDS STANDARD	NOT RATED DUE TO PANDEMIC
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*Please see the [Performance Framework Rubrics](#) for details regarding how each measure is rated.

MEASURE	PROFICIENCY RATING	APPLICABLE RUBRIC DESCRIPTION
MATH PROFICIENCY	Rating Not Applicable for 2020-2021	Not Applicable for 2020-2021 School Year

MEASURE	GROWTH RATING	APPLICABLE RUBRIC DESCRIPTION
MATH GROWTH	Rating Not Applicable for 2020-2021	Not Applicable for 2020-2021 School Year

Academic Outcomes

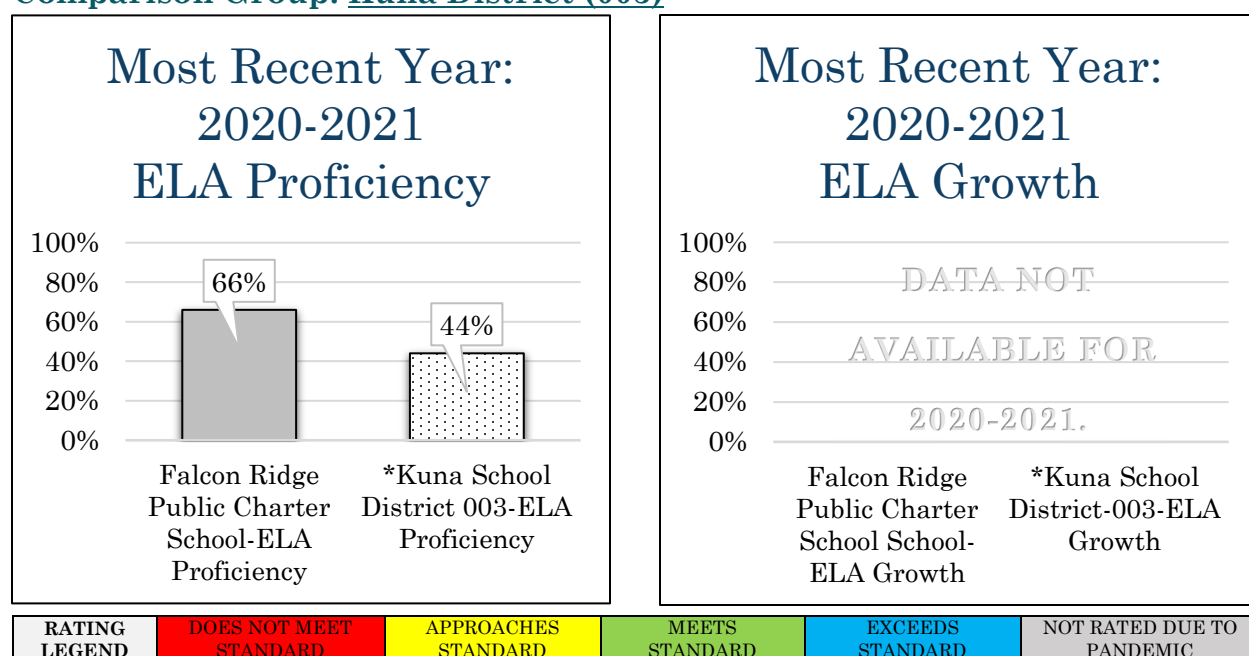
ELA PROFICIENCY & ELA GROWTH

Why This Matters:

The IPCSC must determine whether the academic performance at the school represents a favorable return on the investment of public dollars. For context, the IPCSC considers the school's performance in relation to other educational choices available to families. A school that performs as well or better than the average of its comparison group on the statewide ELA assessment (ISAT) meets the IPCSC standard on both the ELA proficiency and ELA growth measures.

If this standard is not yet met, the school should focus its strategic planning on improving these outcomes to ensure the school will earn a next operational term. If the standard is met, strategic planning may focus on whatever data points will best establish and sustain an exemplary school of the specific model for which the school is chartered.

Comparison Group: Kuna District (003)



*Please see the [Performance Framework Rubrics](#) for details regarding how each measure is rated.

MEASURE	PROFICIENCY RATING	APPLICABLE RUBRIC DESCRIPTION
ELA PROFICIENCY	Rating Not Applicable for 2020-2021	Not Applicable for 2020-2021 School Year

MEASURE	GROWTH RATING	APPLICABLE RUBRIC DESCRIPTION
ELA GROWTH	Rating Not Applicable for 2020-2021	Not Applicable for 2020-2021 School Year

Academic Outcomes

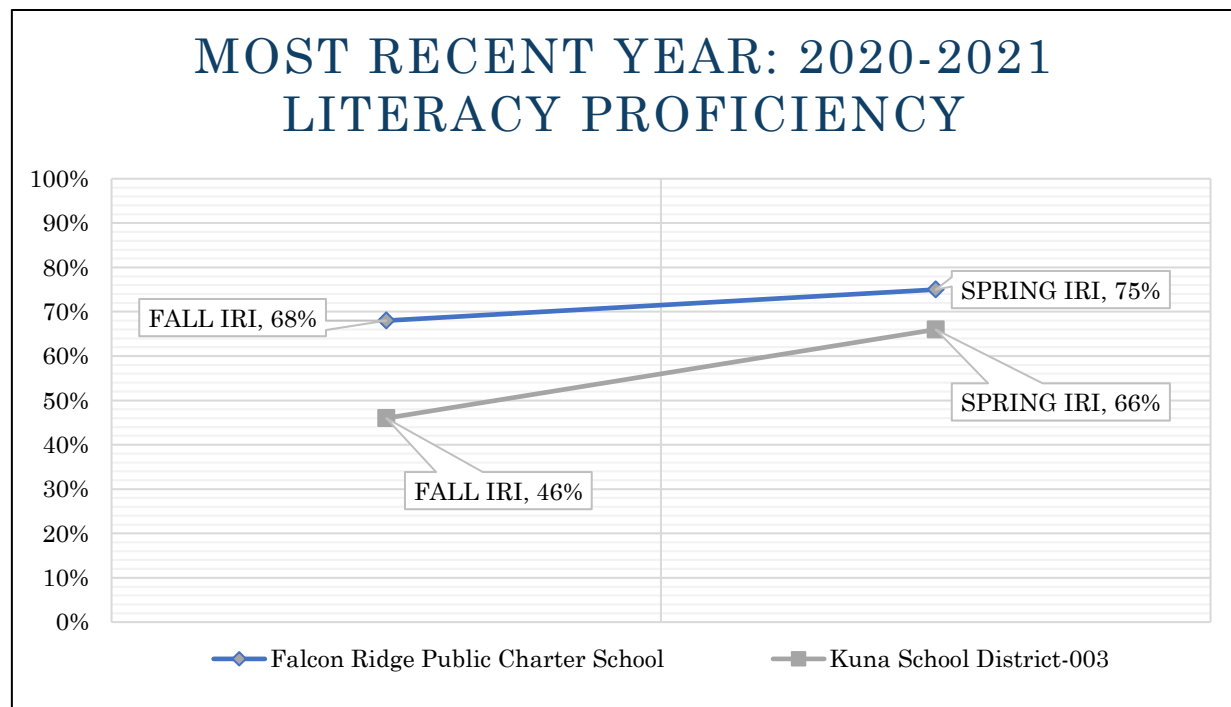
LITERACY PROFICIENCY

Why This Matters:

The IPCSC must determine whether the academic performance at the school represents a favorable return on the investment of public dollars. For context, the IPCSC considers the school's performance in relation to other educational choices available to families. A school that performs as well or better than the average of its comparison group on the spring statewide literacy assessment (IRI) meets the IPCSC standard. Alternatively, a school that did not perform as well or better than its comparison group on the spring assessment, but that did improve its outcome by at least 10% from fall to spring, also meets standard.

If this standard is not yet met, the school should focus its strategic planning on improving these outcomes to ensure the school will earn a next operational term. If the standard is met, strategic planning may focus on whatever data points will best establish and sustain an exemplary school of the specific model for which the school is chartered.

Comparison Group: Kuna District (003)



RATING LEGEND	DOES NOT MEET STANDARD	APPROACHES STANDARD	MEETS STANDARD	EXCEEDS STANDARD	NOT RATED DUE TO PANDEMIC
------------------	---------------------------	------------------------	-------------------	---------------------	------------------------------

*Please see the [Performance Framework Rubrics](#) for details regarding how each measure is rated.

MEASURE	PROFICIENCY RATING	APPLICABLE RUBRIC DESCRIPTION
LITERACY PROFICIENCY	Rating Not Applicable for 2020-2021	Not Applicable for 2020-2021 School Year

Longitudinal Academic Ratings | 2018-2023

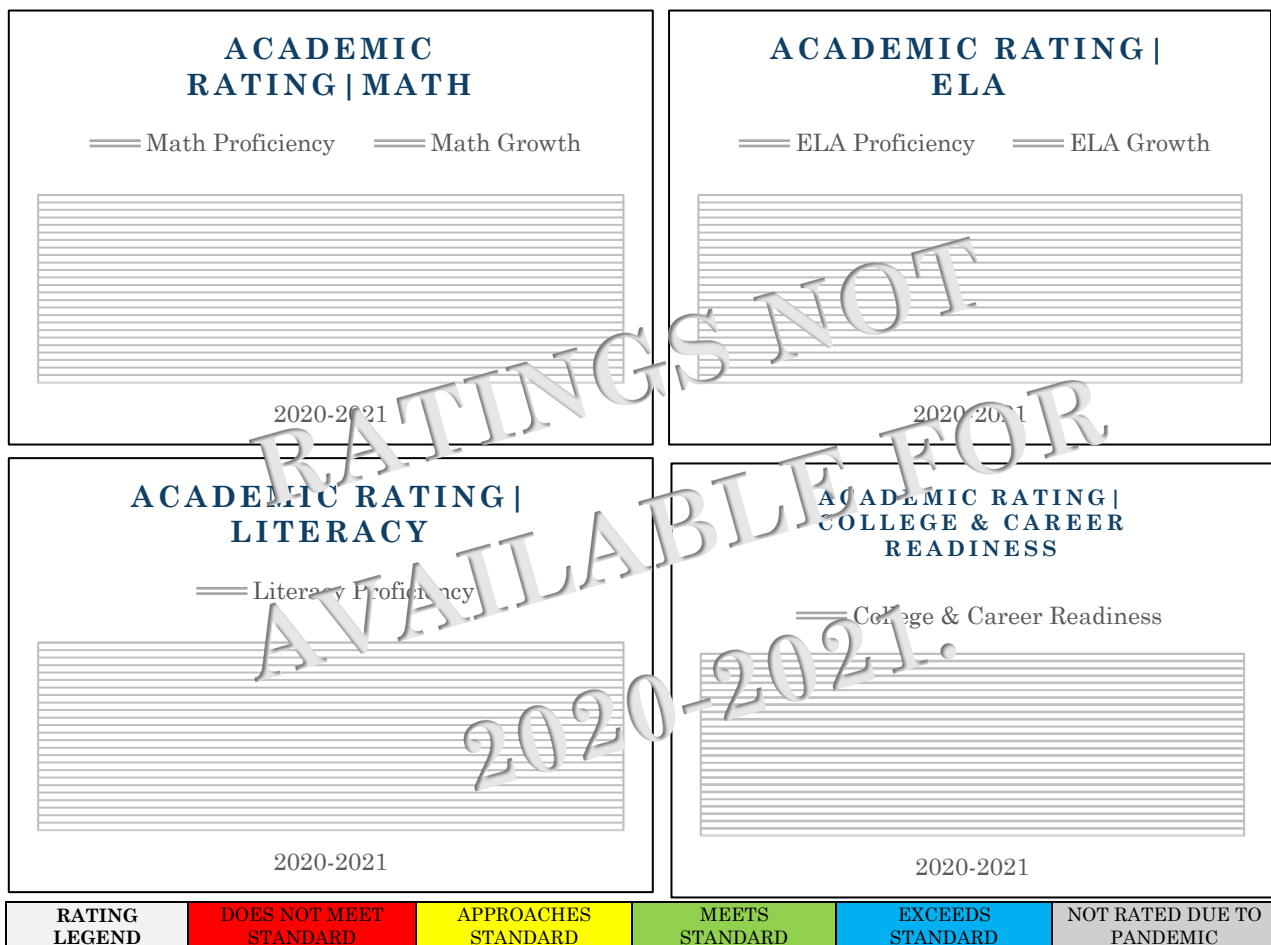
Longitudinal data provides a snapshot of a school's ratings over the school's current performance certificate (5 years). This data helps to identify performance trends and changes over time. Schools are encouraged to consider how this data might be used to drive strategic planning as the school approach its next renewal decision.

Academic Ratings | Historical Framework

SCHOOL YEAR	ACADEMIC GEN ED OUTCOME
2018-2019	HONOR
2019-2020	NOT RATED DUE TO PANDEMIC

Academic Ratings | Revised Framework

Due to COVID-19 pandemic, no academic data was available for the 2019-2020 school year. Additionally, as ratings are used to inform charter renewal decisions, the IPCSC chose to suspend ratings for the 2020-21 school year due to the anticipated impact of the pandemic.



Operational Outcomes

BOARD STEWARDSHIP

Why This Matters:

At the highest level, the success of a charter school is driven by the ability of its governing board to govern effectively. The measures in this section help identify the strengths and challenges faced by the school's board. As success on these measures was not unduly influenced by the pandemic, ratings are applied for the 2020-2021 school year. *Please see the [Performance Framework Rubrics](#) for details regarding how each measure is rated.

STANDARD RATING: EXCEEDS STANDARD	
Governance Structure Measure	Data/Evidence Source
The board bylaws are compliant with ID law.	Bylaws 7/1/19. *Please provide an updated copy if any amendments have been made as of 7/1/21.
The school's articles of incorporation are current.	Articles of Incorporation initially filed on 7/6/2004. Most recently updated on 2/27/2007.
The board does operate in compliance with its bylaws.	*No instances of non-compliance documented.
Investigations were not conducted into 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.
Comments/ Context:	

STANDARD RATING: EXCEEDS STANDARD	
Governance Oversight Measure	Data/Evidence Source
The IPCSC did not evaluate the boards review of academic data in a timely and thorough manner due to pandemic for 2020-2021.	*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.
Comments/ Context:	

STANDARD RATING: EXCEEDS STANDARD	
Governance Compliance Measure	Data/Evidence Source
The IPCSC 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.
Comments/ Context:	

Operational Outcomes

MANAGEMENT

Why This Matters:

The systems and structures that support school operations are an important part of the school's overall success. The measures in this section help identify the strengths and challenges that impact the school's day-to-day operations. As success on these measures was not unduly influenced by the pandemic, ratings are applied for the 2020-2021 school year.

STANDARD RATING: APPROACHES 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 not in good standing.	See comment below.
The school's college and career readiness program is in good standing.	Continuous Improvement Plan 2020-2021
Comments/ Context: School currently has an ongoing corrective action plan for Special Education with the State Department of Education.	

STANDARD RATING: MEETS STANDARD	
Data Security and Information Transparency	Data/Evidence Source
The school's website is not compliant and updated appropriately.	See notes in comment section below
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.
Comments/ Context: the school's IPCSC Annual Report was not posted on the school's website.	

STANDARD RATING: EXCEEDS STANDARD	
Facility and Services	Data/Evidence Source
The school's occupancy certificate is current.	*No instances of non-compliance documented.
Safety inspections and evacuation drills are compliant.	*Most Recent: No instances of non-compliance documented.
<i>The IPCSC did not evaluate school transportation for students due to measure being waived for 2020-2021.</i>	*No instances of non-compliance documented.
<i>The IPCSC did not evaluate school nutrition for students due to measure being waived for 2020-2021</i>	*No instances of non-compliance documented.
Comments/ Context:	

STANDARD RATING: APPROACHES 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 issued by the SDE this year.	See comment below.
Comments/ Context: School currently has an ongoing corrective action plan for Special Education with the State Department of Education, and the school failed to notify the IPCSC in a timely manner.	

Longitudinal Operational Ratings | 2018-2023

Board Stewardship

Longitudinal data provides a snapshot of a school's ratings over the school's current performance certificate (5 years). This data helps to identify performance trends and changes over time. Schools are encouraged to consider how this data might be used to drive your strategic planning as your school approach its next renewal decision.

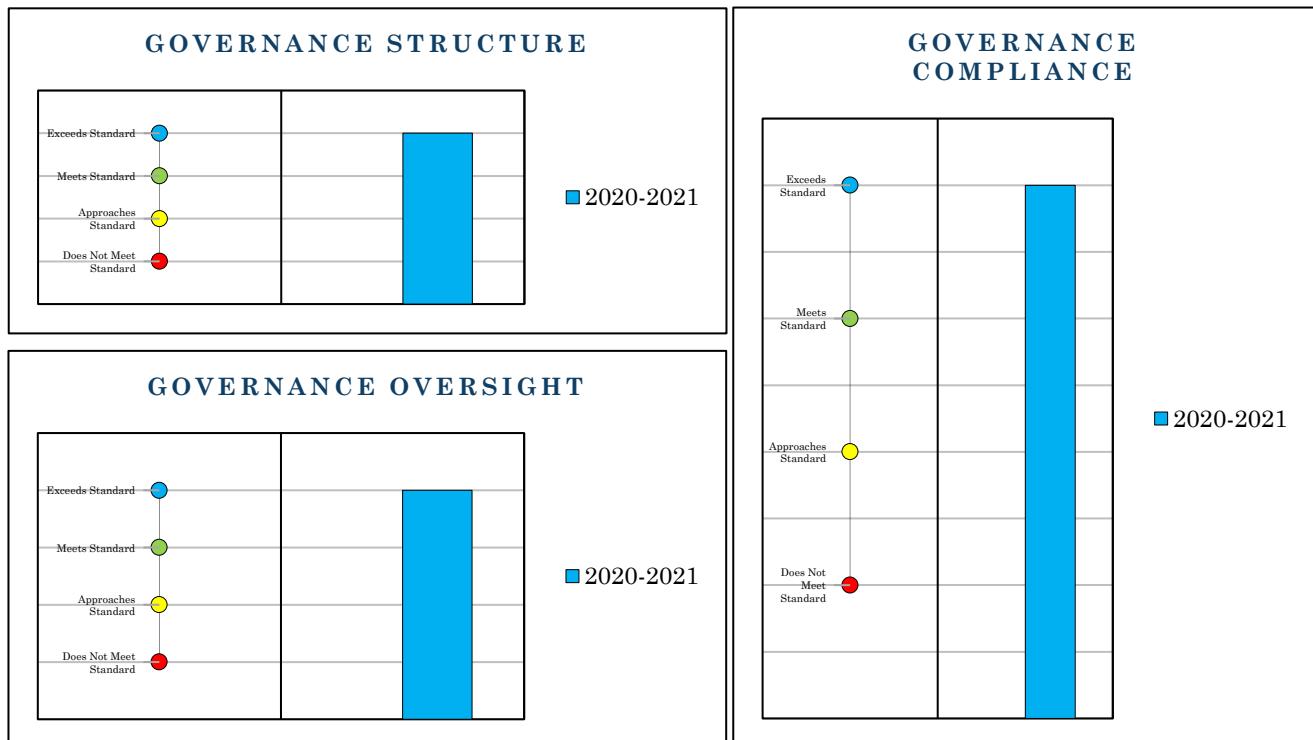
Ratings on the historical and revised framework are not comparable in the operational section. The two sets of data have been included. The school's operational ratings on the historical framework are provided for reference.

Operational Ratings | Historical Framework

School Year	Rating
2018-2019	HONOR
2019-2020	HONOR

Note: In 2020, the IPCSC reorganized these measures for clarity. Operational outcomes are now divided into two sections (board stewardship and management) based on the primary party responsible for the school's success on each measure.

Operational Ratings: Board Stewardship | Revised Framework



Longitudinal Operational Ratings | 2018-2023

Management

Longitudinal data provides a snapshot of a school's ratings over the school's current performance certificate (5 years). This data helps to identify performance trends and changes over time. Schools are encouraged to consider how this data might be used to drive your strategic planning as your school approach its next renewal decision.

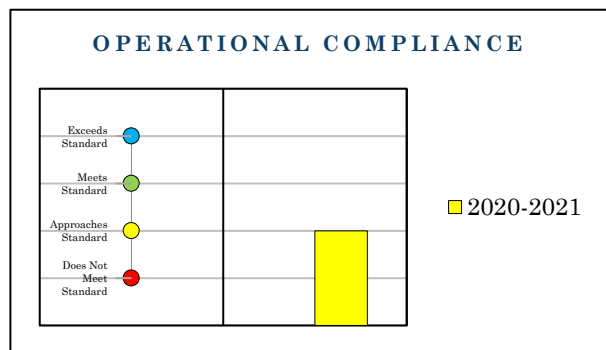
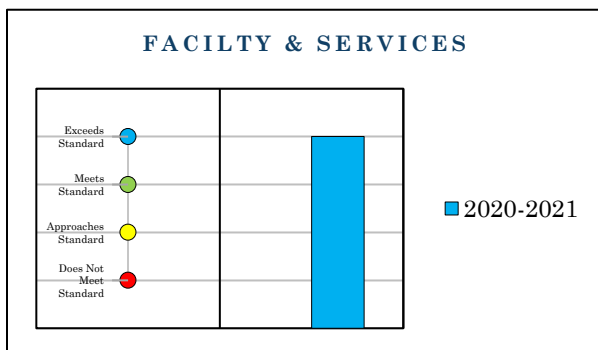
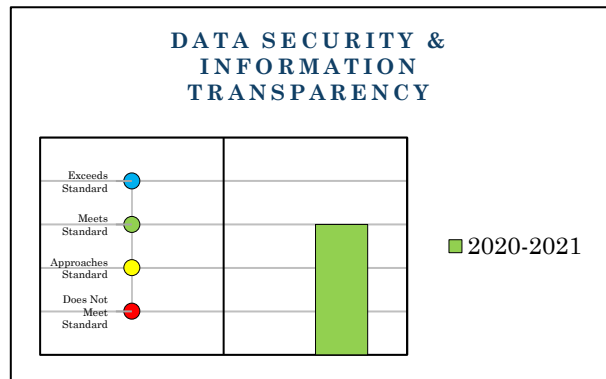
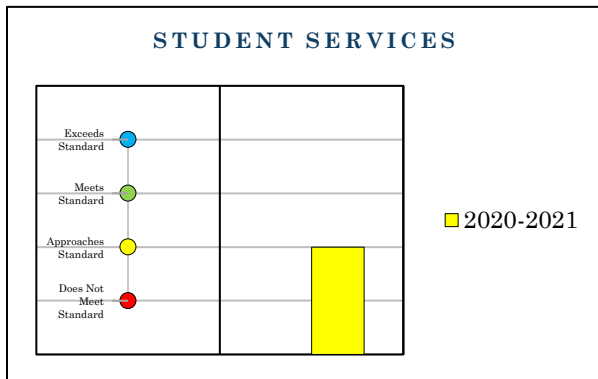
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Operational Ratings | Historical Framework

School Year	Rating
2018-2019	HONOR
2019-2020	HONOR

Note: In 2020, the IPCSC reorganized these measures for clarity. Operational outcomes are now divided into two sections (board stewardship and management) based on the primary party responsible for the school's success on each measure.

Operational Ratings: Management | Revised Framework



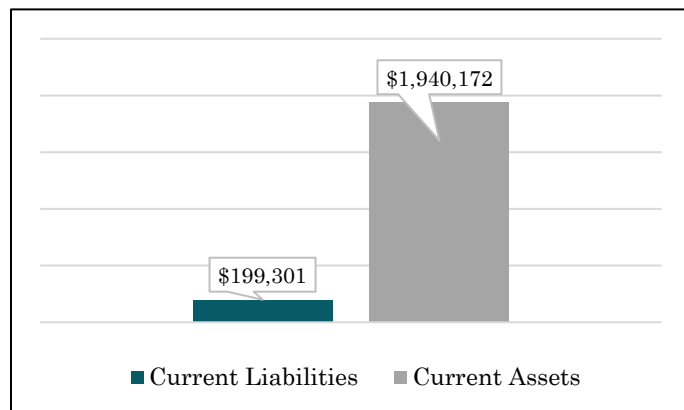
Financial Outcomes

NEAR TERM MEASURES

These measures evaluate whether a school is likely to meet its financial obligations in the next year.
 *Please see the [Performance Framework Rubrics](#) for details regarding how each measure is rated.

Current Ratio

The school has a current ratio of .9 or less.	Current Ratio .31	Ratings Not Applicable for 2020-2021
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Why This Matters:

Current Ratio is a comparison of a school's financial obligations due within one year (current liabilities) to the cash and investments held by the school (current assets).

A school with more assets than liabilities (a Current Ratio greater than 1.0) would be able to meet its financial obligations for the

next year without relying on future revenue.

A school with more liabilities than assets (a Current Ratio of less than 1.0) is dependent on revenue it has not yet received to meet existing financial obligations.

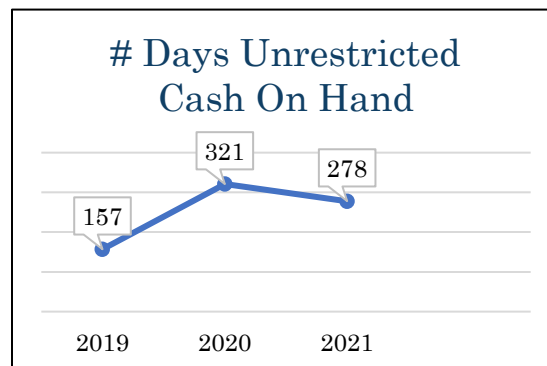
Unrestricted Days Cash

The school has more than 60 days cash on hand	278 Days	Ratings Not Applicable for 2020-2021
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Why this Matters:

This measure estimates a school's average daily cost of operations and considers the number of days a school could operate using only its available cash and investments.

A school with at least 60 days cash on hand would be able to meet its immediate financial obligations with available cash, buying the time it might take to access other current assets. Occasionally, a planned purchase may decrease this number temporarily. In those cases, 30-60 days cash on hand with an upward trend is acceptable. A school with less than 15 days cash on hand is in financial distress and is at risk of automatic closure.



Default

The school is not in default of any financial obligations and did not experience any instances of default during the fiscal year.	Ratings Not Applicable for 2020-2021
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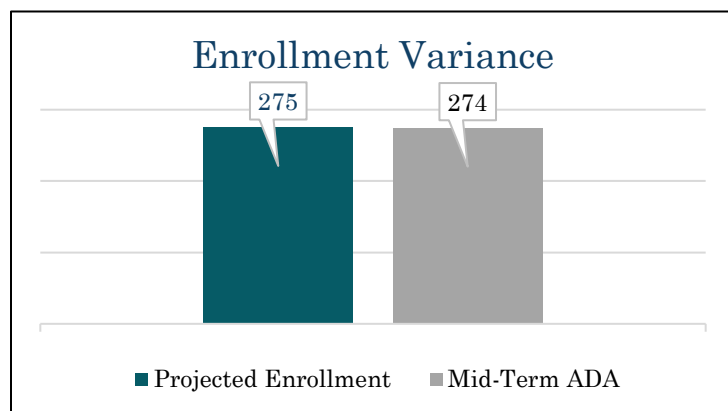
Why this Matters:

This measure identifies whether a school has defaulted on any of its financial obligations. Default can mean many things. Examples of default include: paying bills late, failing to make payroll, or inaccurately filing reports required for funding. Default can also include a failure to meet any additional requirements of long-term debt as established by the lender (such as meeting a specific enrollment target or maintaining a greater amount of cash on hand than the PCSC requires).

Any act of default can result in disruption of services, loans being called due, or funding that is inaccurate or withheld.

Enrollment Variance

The school has maintained at least 95% of its projected enrollment for at least 3 consecutive years.	Enrollment Variance 99.64%	Ratings Not Applicable for 2020-2021
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Why this Matters:

The Enrollment Variance measure considers what percentage of a school's projected enrollment was achieved. As the majority of a public school's funding is generated by student enrollment, this measure reflects a school's ability to execute its budget to plan.

A school that achieves at least 95% of its projected enrollment will likely experience few bumps and may make minor adjustments. A school that achieves less than 95% of projected enrollment is likely to face budget challenges requiring more significant budget amendments and may be in financial distress.

Financial Outcomes

SUSTAINABILITY MEASURES

These measures help determine whether a school is likely to remain financially stable into the future.

Total Margin

The school's most recent year total margin is less than -10%. (DNM)	CY Total Margin -5.82% 3-Year Aggregated 38.43%	Ratings Not Applicable for 2020-2021
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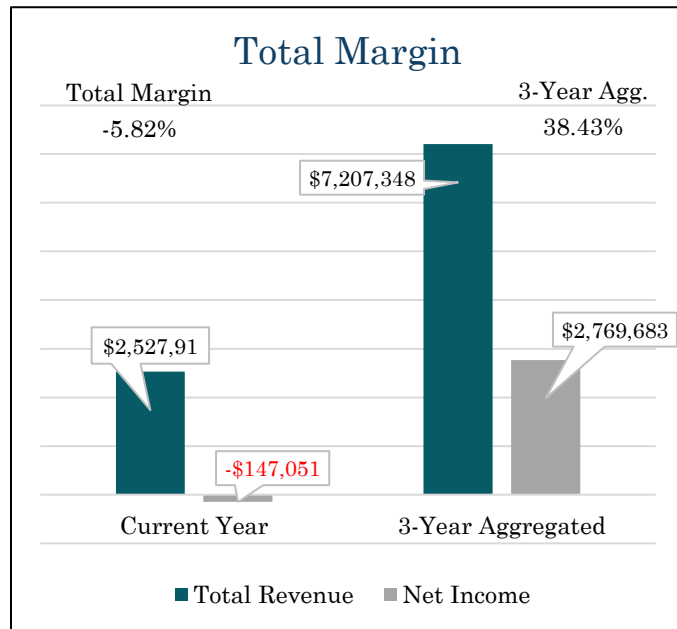
Why this Matters:

The Total Margin compares a school's total revenue to its net income. Specifically, this measure identifies what percentage of a school's total revenue in a given year was not expended during that year. A school with a positive total margin spent less than it brought in. That is, the school is living within its means and can plan for future purchases and investments.

An occasional negative total margin may indicate that a planned or necessary purchase has taken place. This is not necessarily a negative indicator.

However, if the Total Margin is chronically negative or severe decreases appear, the school may be in financial distress. Aggregating this margin over three years helps to identify these long-term trends.

Note: for the purposes of this calculation, pension liability is excluded from the school's net income.



Cash Flow

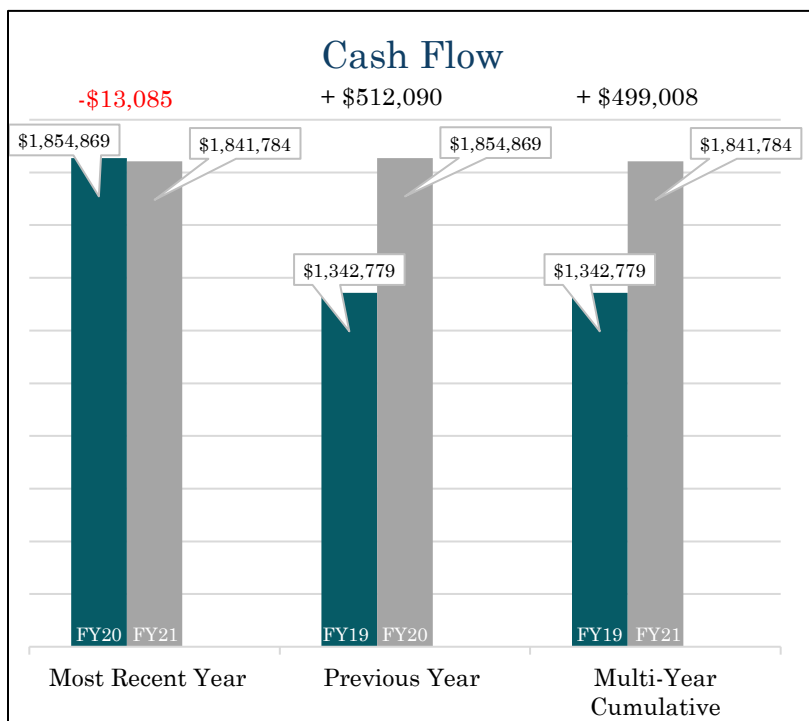
The school's multi-year cumulative cash flow is positive, but the most recent year's cash flow is negative.	Most Recent Year -\$13,085 Previous Year \$512,090 Multi-Year \$499,005	Ratings Not Applicable for 2020-2021
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Why this Matters:

The Cash Flow measure considers the change in a school's cash balance over time. A school with a positive cash flow is increasing its reserves and is likely able to fund future projects and purchases.

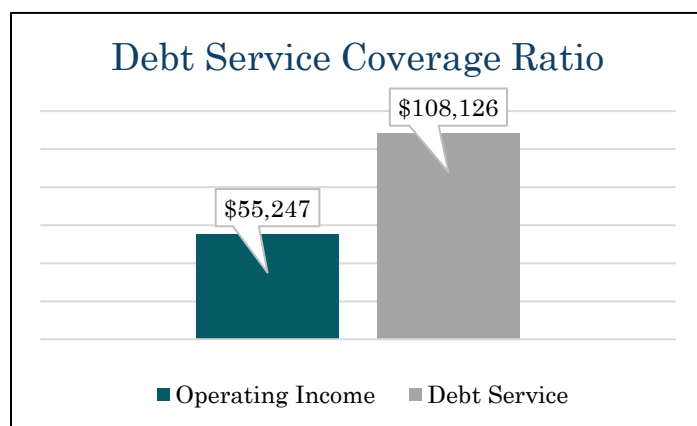
A school with a negative cash flow is using its existing reserves to fund general operations and is not likely to have the financial flexibility to fund future plans.

A multi-year cumulative cash flow helps to identify long-term trends.



Debt Service Coverage Ratio

The school's debt service coverage ratio is less than .9.	Debt Service Coverage Ratio 0.51	Ratings Not Applicable for 2020-2021
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Why this Matters:

This measure evaluates a school's ability to make payments on debt due in a given year using only that year's income. This helps determine whether a school has more debt than it can manage.

A school with more Operating Income than Debt Service (a Debt Service Coverage Ratio greater than 1) can meet the financial obligations of their debt. A

school with more Debt Service than Operating Income (a ratio of less than 1) is reliant on either reserves or revenues anticipated in future years to meet its debt obligations.

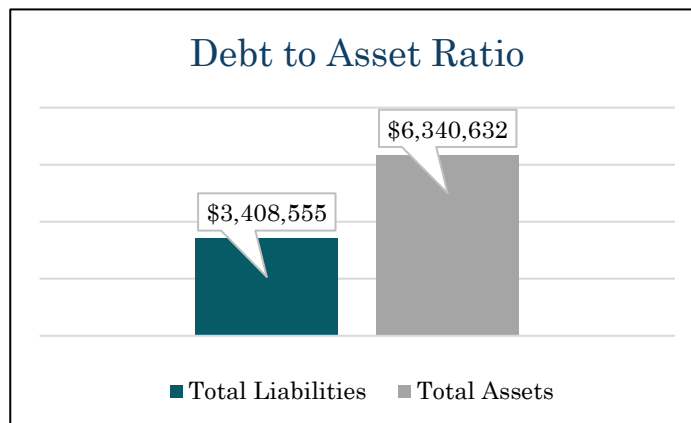
Debt to Asset Ratio

The school's Debt to Asset Ratio is less than 0.9.	Debt/Asset Ratio .54	Ratings Not Applicable for 2020-2021
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Why This Matters:

The Debt to Asset Ratio compares a school's total liabilities to its total assets. This helps determine whether a school would be able to meet both its short and long-term financial obligations.

A school whose total liabilities are 90% or less of its Total Assets is likely to be able to repay all short-term debts and still manage to set its long-term affairs in order in a worst-case scenario. A school with more liabilities than assets would not be able to meet all its financial obligations in a worst-case scenario.



Note: for the purposes of this measure, pension liability is excluded from the school's total liabilities.

Financial Compliance

STANDARD RATING: NOT RATED FOR 2020-2021	
Financial Operations	Data and/or Evidence Source
The school's finances are managed in compliance with GAAP.	Financial Audit 8/4/2021
Expenditures and contracts are posted online appropriately.	School's Expenditure Page 7/30/2021
The school maintains compliant internal controls.	*No instances of non-compliance documented.
The school is not operating under a Notification of Fiscal Concern.	*No instances of non-compliance documented.
The school is not operating under a Notification of Possible or Imminent Closure.	*No instances of non-compliance documented.
Comments/Context	

Longitudinal Financial Ratings | 2018-2023

Longitudinal data provides a snapshot of a school's ratings over the school's current performance certificate (5 years). This data helps to identify performance trends and changes over time. Schools are encouraged to consider how this data might be used to drive your strategic planning as your school approach its next renewal decision.

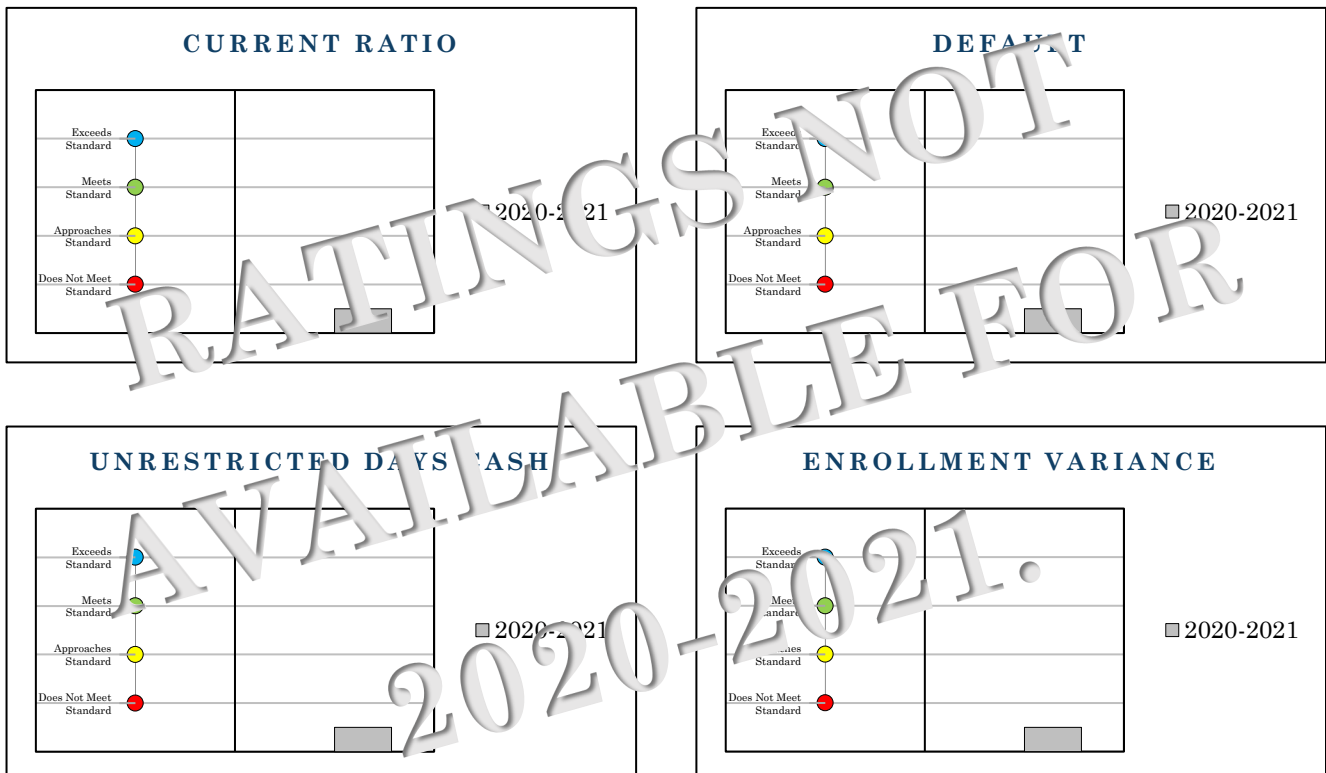
Notes: The 2020 framework revision removed the "cash ratio" measure and moved the existing enrollment variance measure to the financial section.

Due to the impact of the pandemic, financial outcomes are not rated for 2020-21. Additionally, the enrollment variance measure was calculated based on projected enrollment and actual enrollment (not ADA).

Financial Near Term Health Ratings | Historical Framework

School Year	Near Term Health Rating
2018-2019	HONOR
2019-2020	HONOR

Financial Near Term Health Ratings | Revised Framework



Longitudinal Financial Ratings | 2018-2023

Longitudinal data provides a snapshot of a school's ratings over the school's current performance certificate (5 years). This data helps to identify performance trends and changes over time. Schools are encouraged to consider how this data might be used to drive your strategic planning as your school approach its next renewal decision.

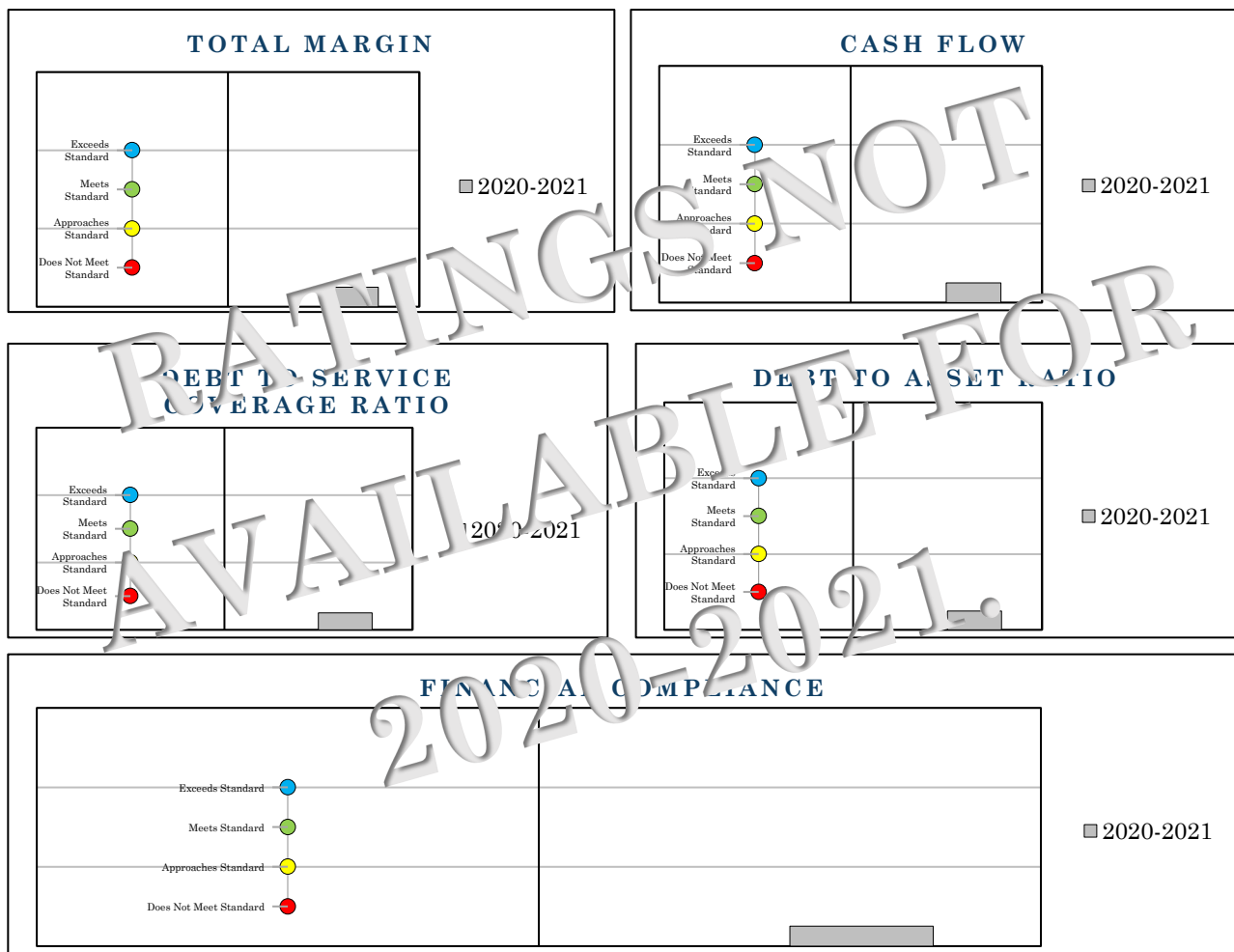
Notes: The 2020 framework revision removed the "cash ratio" measure and moved the existing enrollment variance measure to the financial section.

Due to the impact of the pandemic, financial outcomes are not rated for 2020-21. Additionally, the enrollment variance measure was calculated based on projected enrollment and actual enrollment (not ADA).

Financial Sustainability Ratings | Historical Framework

School Year	Sustainability Rating
2018-2019	HONOR
2019-2020	HONOR

Financial Sustainability Ratings | Revised Framework



*The 2020-2021 Annual Report has been finalized by the
Idaho Public Charter School Commission staff.*

If you have any questions or comments, please contact
the IPCSC.



304 N. 8th St. Ste.242

Boise, ID 83720

208-332-1561

pcsc@osbe.idaho.gov



Annual Performance Report 2021

FUTURE PUBLIC SCHOOL

Mission Statement: Future Public School equips students with the knowledge, skills, and character to succeed in college and the future world. We do so through a commitment to innovative STEM programming, equity, and individualization.

Chair/President	Matthew Kuzio
Treasurer	Will Pigott
Secretary	Suzanne Metzgar
Administrator	Amanda Cox
Business Manager	Lauren Tassos
School Location	511 E 43 rd St., Garden City, ID 83714
School Phone	208-854-3923

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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 includes a framework describing the expectations the school must meet in order to earn a next operational term. It also requires that charter school authorizer's complete performance reports for the schools they oversee each year. The annual performance report serves the following purposes:

1. To provide transparent information about charter school quality to the public;
2. To ensure charter school boards have access to clear expectations and;
3. To inform mid-term authorizing decisions.

This report 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.

Each measure included in the IPCSC'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, the IPCSC has suspended ratings (exceeds, meets, etc.) on academic and financial measures for the FY21 report. All outcomes are included in this report; however, outcomes are not rated.

Future Public School Performance Certificate: [FPS Performance Certificate](#)

Performance Framework: [IPCSC Performance Framework](#)

Current Term: 2017-2023

School Overview

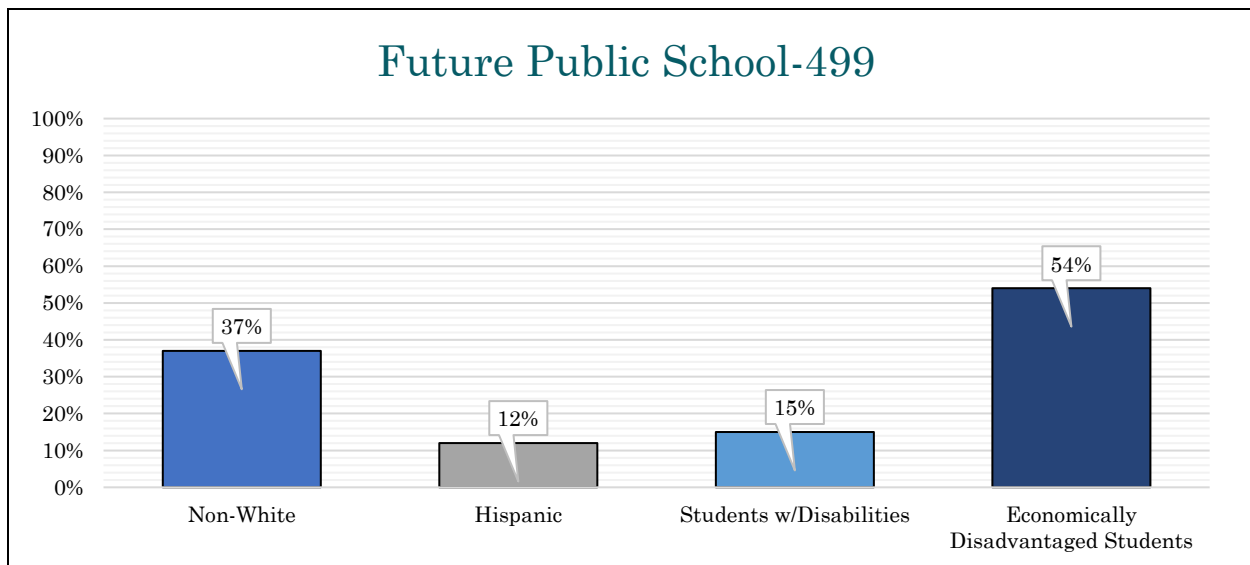
Model:	STEM
Enrollment Capacity:	448
Grades Served:	K-8 th
Enrollment Projected FY22:	442

Key Design Elements:

Our success is driven by:

- *Innovative STEM Implementation:* We build upon the technological fluency students bring to school, incorporate STEM across the curriculum, expand learning opportunities, and heighten human potential.
- *Safe, nurturing, and flexible environments:* Neuroscience research reveals that students need physical and emotional safety in order to take risks and learn from successes and mistakes. The school is built around the student, with flexible learning spaces to accommodate learners of all types. With more time for learning and extracurricular activities, the school day is reimagined, and our students never imagine missing a day of school.
- *Equity, identity, and access:* Increased access to high-quality education for all students is our goal. Building up and affirming the strengths of every student through relationships and restorative practices further creates an individual sense of purpose. Zip code or parental income should not determine student destiny. We build bridges and make community together.
- *High Expectations:* We expect 100% of students to be prepared to go to and through college. We partner with families to create a clearly defined plan to make this happen and measure our progress with data.

2021 FUTURE PUBLIC SCHOOL DEMOGRAPHIC SUMMARY:



2020-2021 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.

RATING LEGEND	DOES NOT MEET STANDARD	APPROACHES STANDARD	MEETS STANDARD	EXCEEDS STANDARD	NOT RATED DUE TO PANDEMIC
------------------	---------------------------	------------------------	-------------------	---------------------	------------------------------

ACADEMIC OUTCOMES:	
Math Proficiency	36%
Math Growth	<i>Data Not Available for 2020-2021</i>
ELA Proficiency	41%
ELA Growth	<i>Data Not Available for 2020-2021</i>
Literacy Proficiency	FALL IRI: 50% SPRING IRI: 60%

FINANCIAL OUTCOMES: NEAR TERM MEASURES	
Current Ratio	1.13
Unrestricted Days Cash	62
Default	None
Enrollment Variance	97.94%

OPERATIONAL OUTCOMES: BOARD STEWARDSHIP	
Governance Structure	EXCEEDS STANDARD
Governance Oversight	EXCEEDS STANDARD
Governance Compliance	EXCEEDS STANDARD

FINANCIAL OUTCOMES: SUSTAINABILITY MEASURES	
Total Margin 3 Yr. Aggregate Margin	TM: 4.00% 3YR: 7.39%
Cash Flow Multi-Year Cash Flow	CF: \$186,228 MY: \$377,945
Debt Service Coverage Ratio	1.23
Debt Asset Ratio	.42
Financial Compliance	Not Rated for 2020-2021

OPERATIONAL OUTCOMES: MANAGEMENT	
Student Services	EXCEEDS STANDARD
Data Security/Transparency	EXCEEDS STANDARD
Facility & Services	EXCEEDS STANDARD
Operational Compliance	EXCEEDS STANDARD

Note: Due to the impact of the pandemic, Academic outcomes were not available for the 2019-2020 school year. Academic outcomes are available but will not be rated for the 2020-2021 school year.

Academic Outcomes

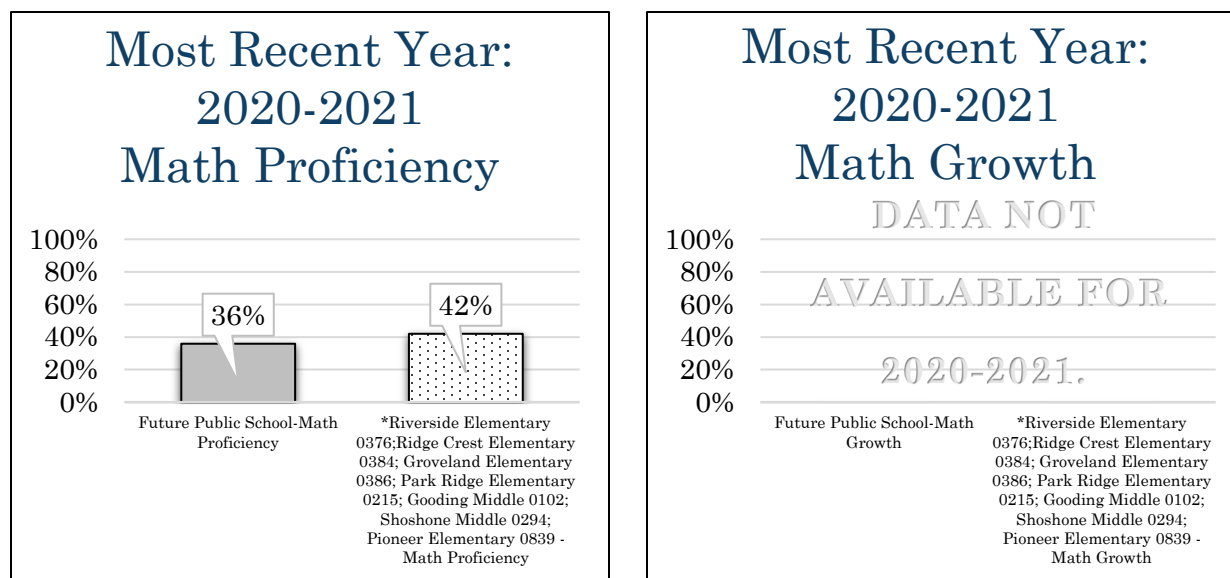
MATH PROFICIENCY & MATH GROWTH

Why This Matters:

The IPCSC must determine whether the academic performance at the school represents a favorable return on the investment of public dollars. For context, the IPCSC considers the school's performance in relation to other educational choices available to families. A school that performs as well or better than the average of its comparison group on the statewide mathematics assessment (ISAT) meets the IPCSC standard on both the math proficiency and math growth measures.

If this standard is not yet met, the school should focus its strategic planning on improving mathematics achievement outcomes to ensure the school will earn a next operational term. If the standard is met, strategic planning may focus on whatever data points will best establish and sustain an exemplary school of the specific model for which the school is chartered.

Comparison Group: Groveland Elementary School (0386); Parkridge Elementary (0215); Ridge Crest Elementary (0384); Shoshone Middle School (0839); Gooding Middle School (0102); Riverside Elementary (k-3) (0376); Pioneer Elementary (0839)



RATING LEGEND	DOES NOT MEET STANDARD	APPROACHES STANDARD	MEETS STANDARD	EXCEEDS STANDARD	NOT RATED DUE TO PANDEMIC
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*Please see the [Performance Framework Rubrics](#) for details regarding how each measure is rated.

MEASURE	PROFICIENCY RATING	APPLICABLE RUBRIC DESCRIPTION
MATH PROFICIENCY	Rating Not Applicable for 2020-2021	Not Applicable for 2020-2021 School Year

MEASURE	GROWTH RATING	APPLICABLE RUBRIC DESCRIPTION
MATH GROWTH	Rating Not Applicable for 2020-2021	Not Applicable for 2020-2021 School Year

Academic Outcomes

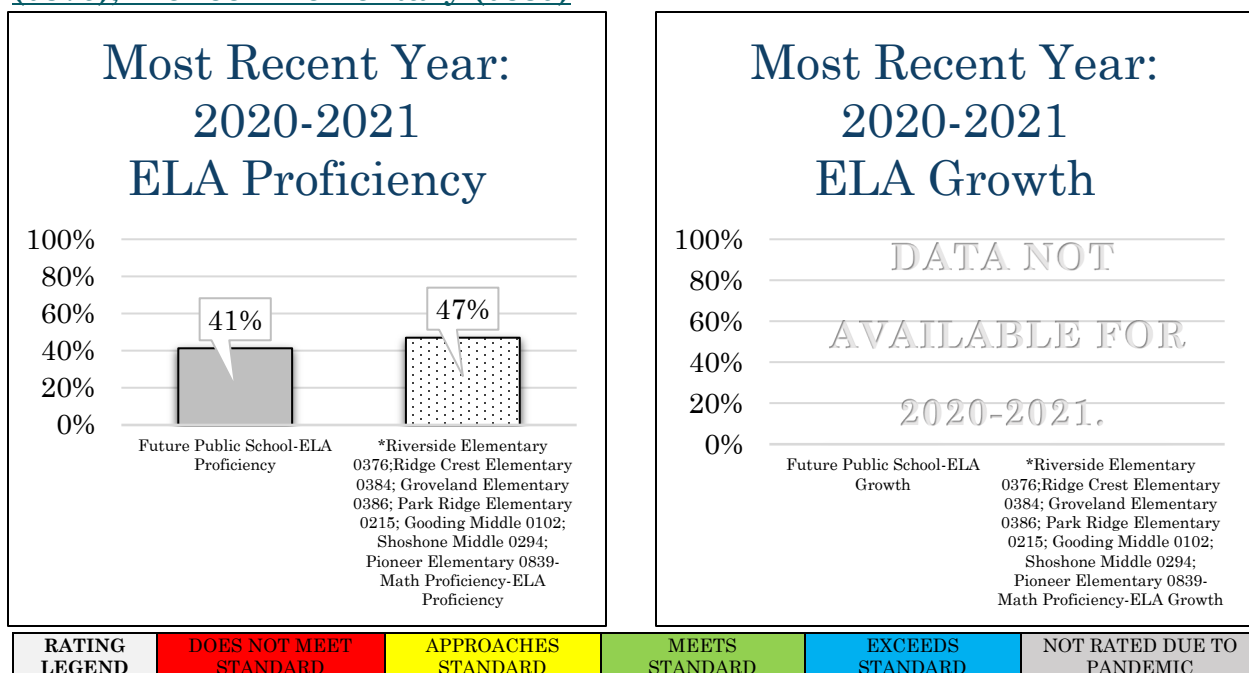
ELA PROFICIENCY & ELA GROWTH

Why This Matters:

The IPCSC must determine whether the academic performance at the school represents a favorable return on the investment of public dollars. For context, the IPCSC considers the school's performance in relation to other educational choices available to families. A school that performs as well or better than the average of its comparison group on the statewide ELA assessment (ISAT) meets the IPCSC standard on both the ELA proficiency and ELA growth measures.

If this standard is not yet met, the school should focus its strategic planning on improving these outcomes to ensure the school will earn a next operational term. If the standard is met, strategic planning may focus on whatever data points will best establish and sustain an exemplary school of the specific model for which the school is chartered.

Comparison Group: Groveland Elementary School (0386); Parkridge Elementary (0215); Ridge Crest Elementary (0384); Shoshone Middle School (0839); Gooding Middle School (0102); Riverside Elementary (k-3) (0376); Pioneer Elementary (0839)



*Please see the [Performance Framework Rubrics](#) for details regarding how each measure is rated.

MEASURE	PROFICIENCY RATING	APPLICABLE RUBRIC DESCRIPTION
ELA PROFICIENCY	Rating Not Applicable for 2020-2021	Not Applicable for 2020-2021 School Year

MEASURE	GROWTH RATING	APPLICABLE RUBRIC DESCRIPTION
ELA GROWTH	Rating Not Applicable for 2020-2021	Not Applicable for 2020-2021 School Year

Academic Outcomes

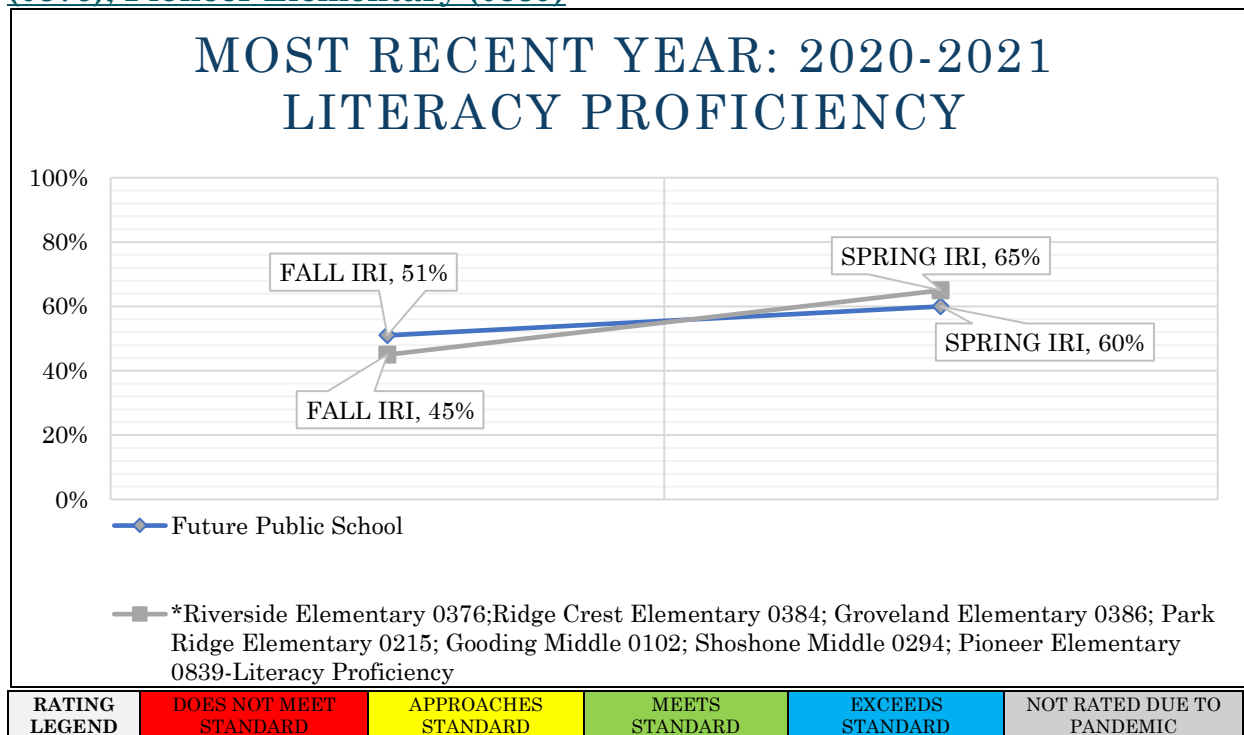
LITERACY PROFICIENCY

Why This Matters:

The IPCSC must determine whether the academic performance at the school represents a favorable return on the investment of public dollars. For context, the IPCSC considers the school's performance in relation to other educational choices available to families. A school that performs as well or better than the average of its comparison group on the spring statewide literacy assessment (IRI) meets the IPCSC standard. Alternatively, a school that did not perform as well or better than its comparison group on the spring assessment, but that did improve its outcome by at least 10% from fall to spring, also meets standard.

If this standard is not yet met, the school should focus its strategic planning on improving these outcomes to ensure the school will earn a next operational term. If the standard is met, strategic planning may focus on whatever data points will best establish and sustain an exemplary school of the specific model for which the school is chartered.

Comparison Group: Groveland Elementary School (0386); Parkridge Elementary (0215); Ridge Crest Elementary (0384); Shoshone Middle School (0839); Gooding Middle School (0102); Riverside Elementary (k-3) (0376); Pioneer Elementary (0839)



*Please see the [Performance Framework Rubrics](#) for details regarding how each measure is rated.

MEASURE	PROFICIENCY RATING	APPLICABLE RUBRIC DESCRIPTION
LITERACY PROFICIENCY	Rating Not Applicable for 2020-2021	Not Applicable for 2020-2021 School Year

Longitudinal Academic Ratings | 2017-2023

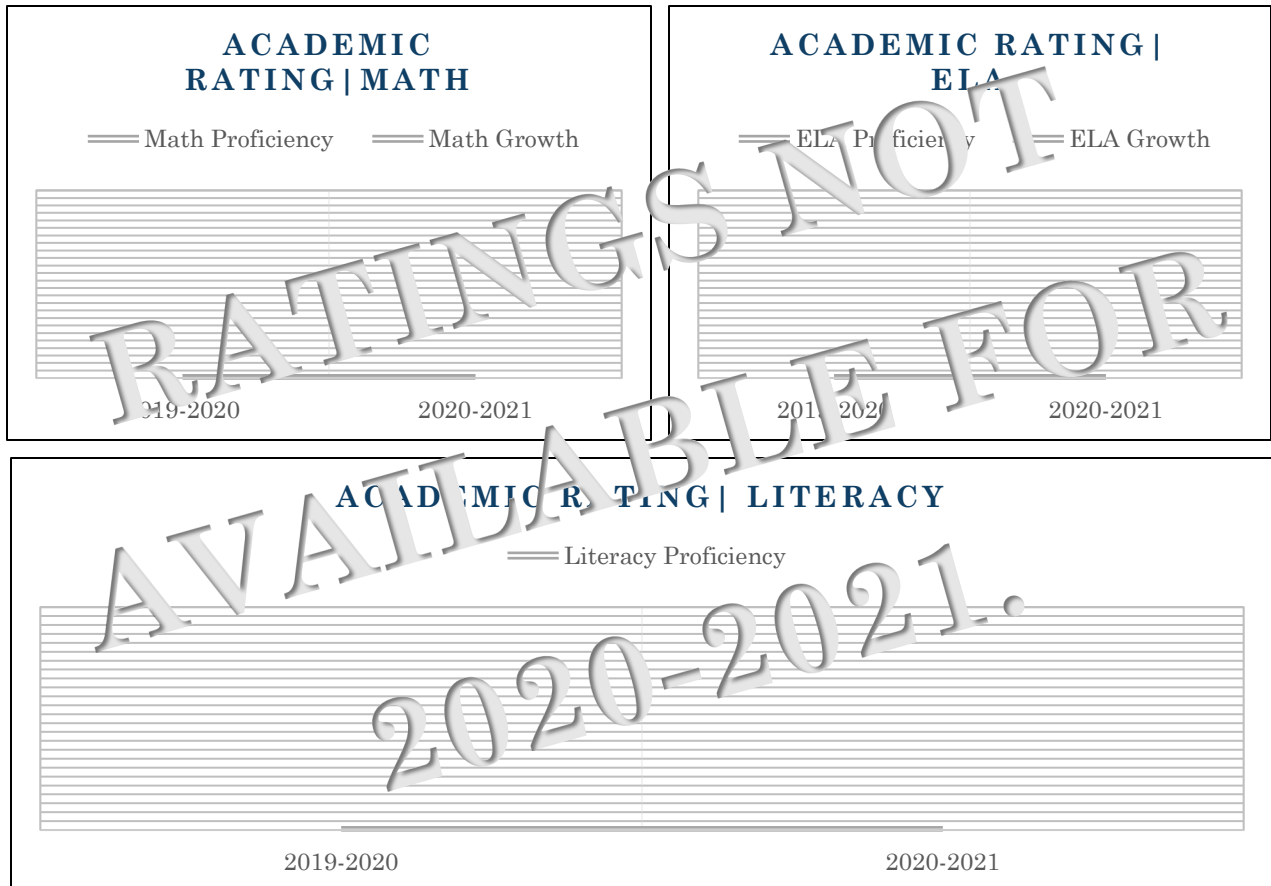
Longitudinal data provides a snapshot of a school's ratings over the school's current performance certificate (5 years). This data helps to identify performance trends and changes over time. Schools are encouraged to consider how this data might be used to drive strategic planning as the school approach its next renewal decision.

Academic Ratings | Historical Framework

SCHOOL YEAR	ACADEMIC GEN ED OUTCOME
2018-2019	CRITICAL

Academic Ratings | Revised Framework

Due to COVID-19 pandemic, no academic data was available for the 2019-2020 school year. Additionally, as ratings are used to inform charter renewal decisions, the IPCSC chose to suspend ratings for the 2020-21 school year due to the anticipated impact of the pandemic.



RATING LEGEND	DOES NOT MEET STANDARD	APPROACHES STANDARD	MEETS STANDARD	EXCEEDS STANDARD	NOT RATED DUE TO PANDEMIC
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Operational Outcomes

BOARD STEWARDSHIP

Why This Matters:

At the highest level, the success of a charter school is driven by the ability of its governing board to govern effectively. The measures in this section help identify the strengths and challenges faced by the school's board. As success on these measures was not unduly influenced by the pandemic, ratings are applied for the 2020-2021 school year. *Please see the [Performance Framework Rubrics](#) for details regarding how each measure is rated.

STANDARD RATING: EXCEEDS STANDARD	
Governance Structure Measure	Data/Evidence Source
The board bylaws are compliant with ID law.	Bylaws 06/01/2021. If the school has amended its bylaws since this date, please provide an updated copy to the IPCSC.
The school's articles of incorporation are current.	Articles of Incorporation initially filed on 02/28/2017. Most recently updated on 01/06/2021.
The board does operate in compliance with its bylaws.	*No instances of non-compliance documented.
Investigations were not conducted into 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.
Comments/ Context:	

STANDARD RATING: EXCEEDS STANDARD	
Governance Oversight Measure	Data/Evidence Source
The IPCSC did not evaluate the boards review of academic data in a timely and thorough manner due to pandemic for 2020-2021.	*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 not 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.
Comments/ Context:	

STANDARD RATING: EXCEEDS STANDARD	
Governance Compliance Measure	Data/Evidence Source
The IPCSC 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.
Comments/ Context:	

Operational Outcomes

MANAGEMENT

Why This Matters:

The systems and structures that support school operations are an important part of the school's overall success. The measures in this section help identify the strengths and challenges that impact the school's day-to-day operations. As success on these measures was not unduly influenced by the pandemic, ratings are applied for the 2020-2021 school year.

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.	Reviewed on 6/29/2021 Continuous Improvement Plan 2020-2021
Comments/ Context:	

STANDARD RATING: EXCEEDS STANDARD	
Data Security and Information Transparency	Data/Evidence Source
The school's website is not compliant and updated appropriately.	*See comment.
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.
Comments/ Context:	

STANDARD RATING: EXCEEDS STANDARD	
Facility and Services	Data/Evidence Source
The school's occupancy certificate is current.	*No instances of non-compliance documented.
Safety inspections and evacuation drills are compliant.	Building Inspection: 08/13/2020 Fire Marshal: 08/30/2019 Health Inspection: 03/31/2021 No instances of non-compliance documented.
<i>The IPCSC did not evaluate school transportation for students due to measure being waived for 2020-2021.</i>	*No instances of non-compliance documented.
<i>The IPCSC did not evaluate school nutrition for students due to measure being waived for 2020-2021</i>	*No instances of non-compliance documented.
Comments/ Context:	

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.
Comments/ Context:	

Longitudinal Operational Ratings | 2017-2023

Board Stewardship

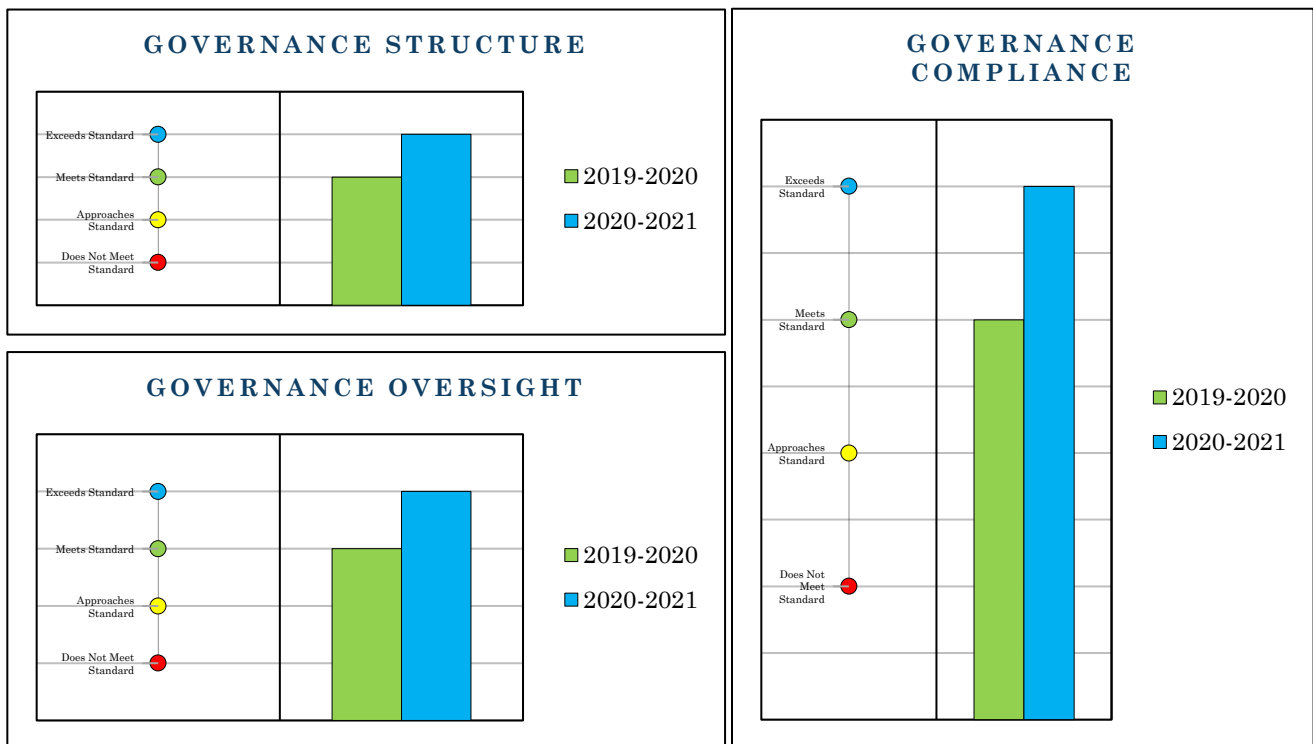
Longitudinal data provides a snapshot of a school's ratings over the school's current performance certificate (5 years). This data helps to identify performance trends and changes over time. Schools are encouraged to consider how this data might be used to drive your strategic planning as your school approach its next renewal decision.

Ratings on the historical and revised framework are not comparable in the operational Note: In 2020, the IPSC data have been included. The school's operational ratings are now divided into two sections (board stewardship and management) based on the primary party responsible for the school's success on each measure.

Operational Ratings | Historical Framework

School Year	Rating
2018-2019	HONOR

Operational Ratings: Board Stewardship | Revised Framework



Longitudinal Operational Ratings | 2018-2023

Management

Longitudinal data provides a snapshot of a school's ratings over the school's current performance certificate (5 years). This data helps to identify performance trends and changes over time. Schools are encouraged to consider how this data might be used to drive your strategic planning as your school approach its next renewal decision.

Ratings on the historical and revised framework are not comparable in the operational section. The two sets of data have been included. The school's operational ratings on the historical framework are provided for reference.

Operational Ratings | Historical Framework

School Year	Rating
2018-2019	HONOR

Note: In 2020, the IPCSC reorganized these measures for clarity. Operational outcomes are now divided into two sections (board stewardship and management) based on the primary party responsible for the school's success on each measure.

Operational Ratings: Management | Revised Framework



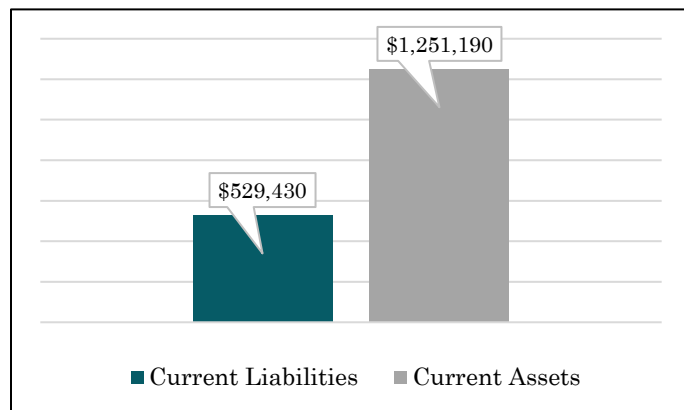
Financial Outcomes

NEAR TERM MEASURES

These measures evaluate whether a school is likely to meet its financial obligations in the next year.
 *Please see the [Performance Framework Rubrics](#) for details regarding how each measure is rated.

Current Ratio

The school has a current ratio of between 1.1 and 1.5.	Current Ratio 1.13	Ratings Not Applicable for 2020-2021
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Why This Matters:

Current Ratio is a comparison of a school's financial obligations due within one year (current liabilities) to the cash and investments held by the school (current assets).

A school with more assets than liabilities (a Current Ratio greater than 1.0) would be able to meet its financial obligations for the

next year without relying on future revenue.

A school with more liabilities than assets (a Current Ratio of less than 1.0) is dependent on revenue it has not yet received to meet existing financial obligations.

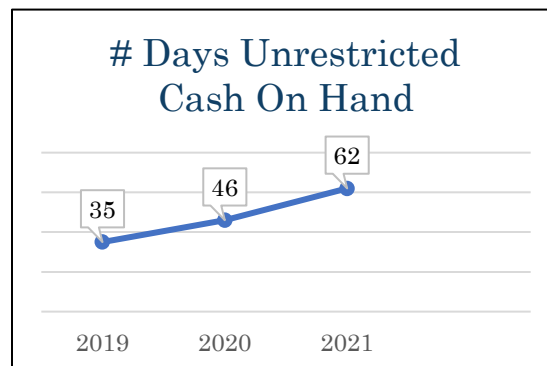
Unrestricted Days Cash

The school has more than 60 days cash on hand	62 Days	Ratings Not Applicable for 2020-2021
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Why this Matters:

This measure estimates a school's average daily cost of operations and considers the number of days a school could operate using only its available cash and investments.

A school with at least 60 days cash on hand would be able to meet its immediate financial obligations with available cash, buying the time it might take to access other current assets. Occasionally, a planned purchase may decrease this number temporarily. In those cases, 30-60 days cash on hand with an upward trend is acceptable. A school with less than 15 days cash on hand is in financial distress and is at risk of automatic closure.



Default

The school is not in default of any financial obligations and did not experience any instances of default during the fiscal year.	Ratings Not Applicable for 2020-2021
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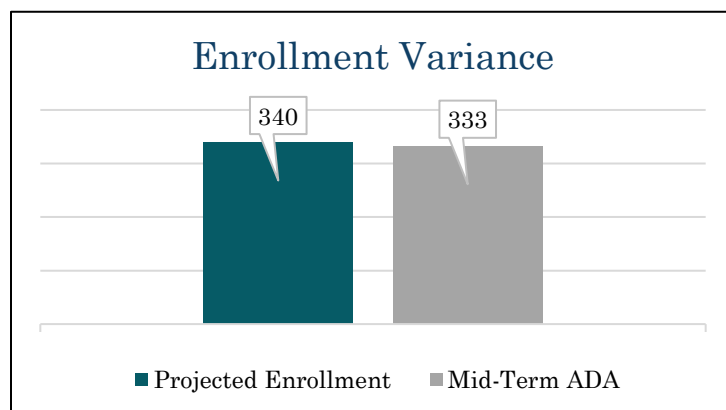
Why this Matters:

This measure identifies whether a school has defaulted on any of its financial obligations. Default can mean many things. Examples of default include: paying bills late, failing to make payroll, or inaccurately filing reports required for funding. Default can also include a failure to meet any additional requirements of long-term debt as established by the lender (such as meeting a specific enrollment target or maintaining a greater amount of cash on hand than the PCSC requires).

Any act of default can result in disruption of services, loans being called due, or funding that is inaccurate or withheld.

Enrollment Variance

The school achieved and sustained at least 95% of its projected enrollment during the most recent school year.	Enrollment Variance 97.94%	Ratings Not Applicable for 2020-2021
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Why this Matters:

The Enrollment Variance measure considers what percentage of a school's projected enrollment was achieved. As the majority of a public school's funding is generated by student enrollment, this measure reflects a school's ability to execute its budget to plan.

A school that achieves at least 95% of its projected enrollment will likely experience few bumps and may make minor adjustments. A school that achieves less than 95% of projected enrollment is likely to face budget challenges requiring more significant budget amendments and may be in financial distress.

Financial Outcomes

SUSTAINABILITY MEASURES

These measures help determine whether a school is likely to remain financially stable into the future.

Total Margin

The school has maintained a positive total margin for at least 3 consecutive years.	CY Total Margin 4.00% 3-Year Aggregated 7.39%	Ratings Not Applicable for 2020-2021
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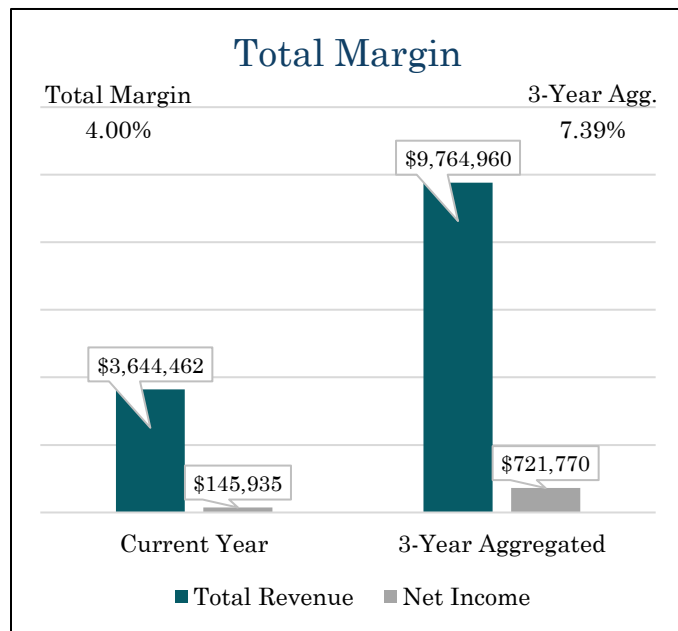
Why this Matters:

The Total Margin compares a school's total revenue to its net income. Specifically, this measure identifies what percentage of a school's total revenue in a given year was not expended during that year. A school with a positive total margin spent less than it brought in. That is, the school is living within its means and can plan for future purchases and investments.

An occasional negative total margin may indicate that a planned or necessary purchase has taken place. This is not necessarily a negative indicator.

However, if the Total Margin is chronically negative or severe decreases appear, the school may be in financial distress. Aggregating this margin over three years helps to identify these long-term trends.

Note: for the purposes of this calculation, pension liability is excluded from the school's net income.



Cash Flow

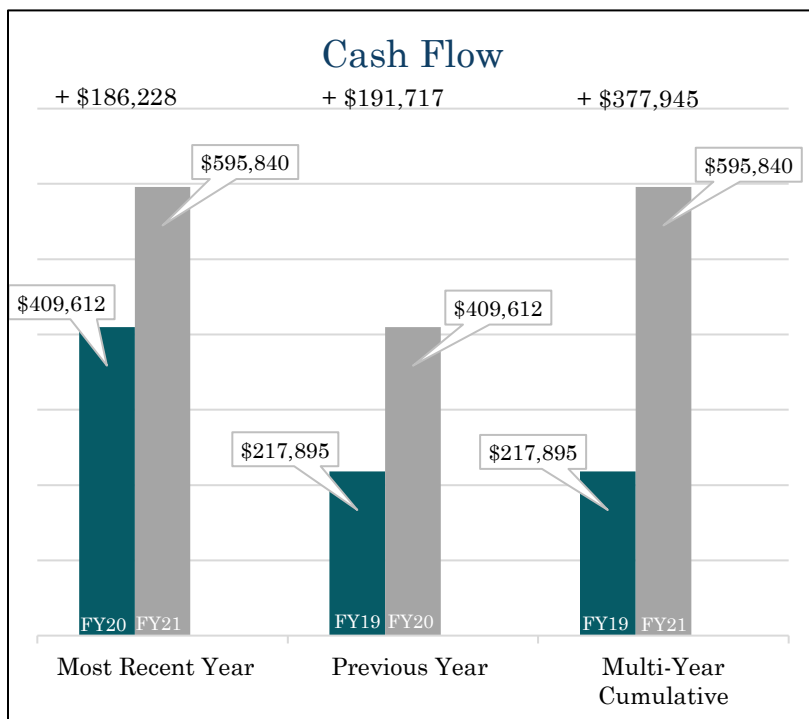
The school's multi-year cumulative cash flow has been positive, and the most recent year's cash flow has been positive for at least 3 consecutive years.	Most Recent Year \$186,228 Previous Year \$191,717 Multi-Year \$377,945	Ratings Not Applicable for 2020-2021
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Why this Matters:

The Cash Flow measure considers the change in a school's cash balance over time. A school with a positive cash flow is increasing its reserves and is likely able to fund future projects and purchases.

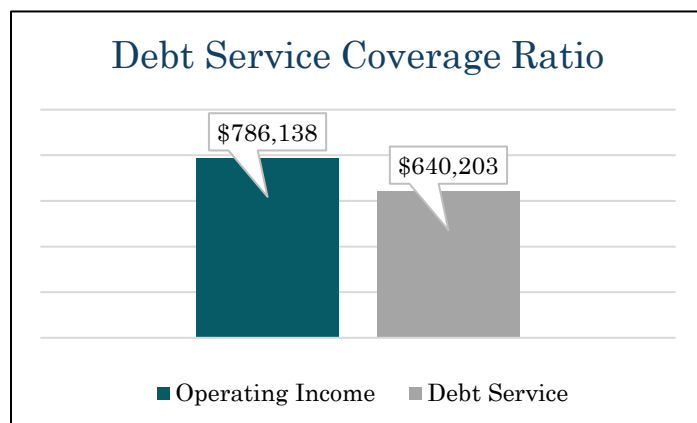
A school with a negative cash flow is using its existing reserves to fund general operations and is not likely to have the financial flexibility to fund future plans.

A multi-year cumulative cash flow helps to identify long-term trends.



Debt Service Coverage Ratio

Debt Service Coverage Ratio is between 1.1 and 1.49.	Debt Service Coverage Ratio 1.23	Ratings Not Applicable for 2020-2021
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Why this Matters:

This measure evaluates a school's ability to make payments on debt due in a given year using only that year's income. This helps determine whether a school has more debt than it can manage.

A school with more Operating Income than Debt Service (a Debt Service Coverage Ratio greater than 1) can meet the financial obligations of their debt. A

school with more Debt Service than Operating Income (a ratio of less than 1) is reliant on either reserves or revenues anticipated in future years to meet its debt obligations.

Debt to Asset Ratio

The school has maintained a debt to asset ratio less than .9 for at least 3 consecutive years.	Debt/Asset Ratio .42	Ratings Not Applicable for 2020-2021
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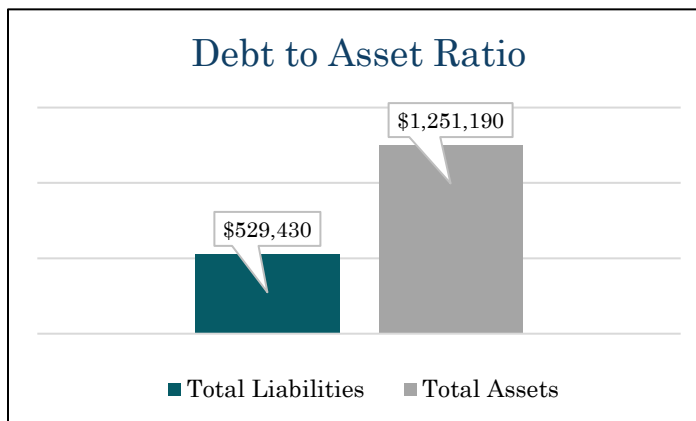
Why This Matters:

The Debt to Asset Ratio compares a school's total liabilities to its total assets. This helps determine whether a school would be able to meet both its short and long-term financial obligations.

A school whose total liabilities are 90% or less of its Total Assets is

likely to be able to repay all short-term debts and still manage to set its long-term affairs in order in a worst-case scenario. A school with more liabilities than assets would not be able to meet all its financial obligations in a worst-case scenario.

Note: for the purposes of this measure, pension liability is excluded from the school's total liabilities.



Financial Compliance

STANDARD RATING: NOT RATED FOR 2020-2021	
Financial Operations	Data and/or Evidence Source
The school's finances are managed in compliance with GAAP.	Financial Audit 10/25/2021
Expenditures and contracts are posted online appropriately.	School's Expenditure Page 7/30/2021
The school maintains compliant internal controls.	*No instances of non-compliance documented.
The school is not operating under a Notification of Fiscal Concern.	*No instances of non-compliance documented.
The school is not operating under a Notification of Possible or Imminent Closure.	*No instances of non-compliance documented.
Comments/Context	

Longitudinal Financial Ratings | 2017-2023

Longitudinal data provides a snapshot of a school's ratings over the school's current performance certificate (5 years). This data helps to identify performance trends and changes over time. Schools are encouraged to consider how this data might be used to drive your strategic planning as your school approach its next renewal decision.

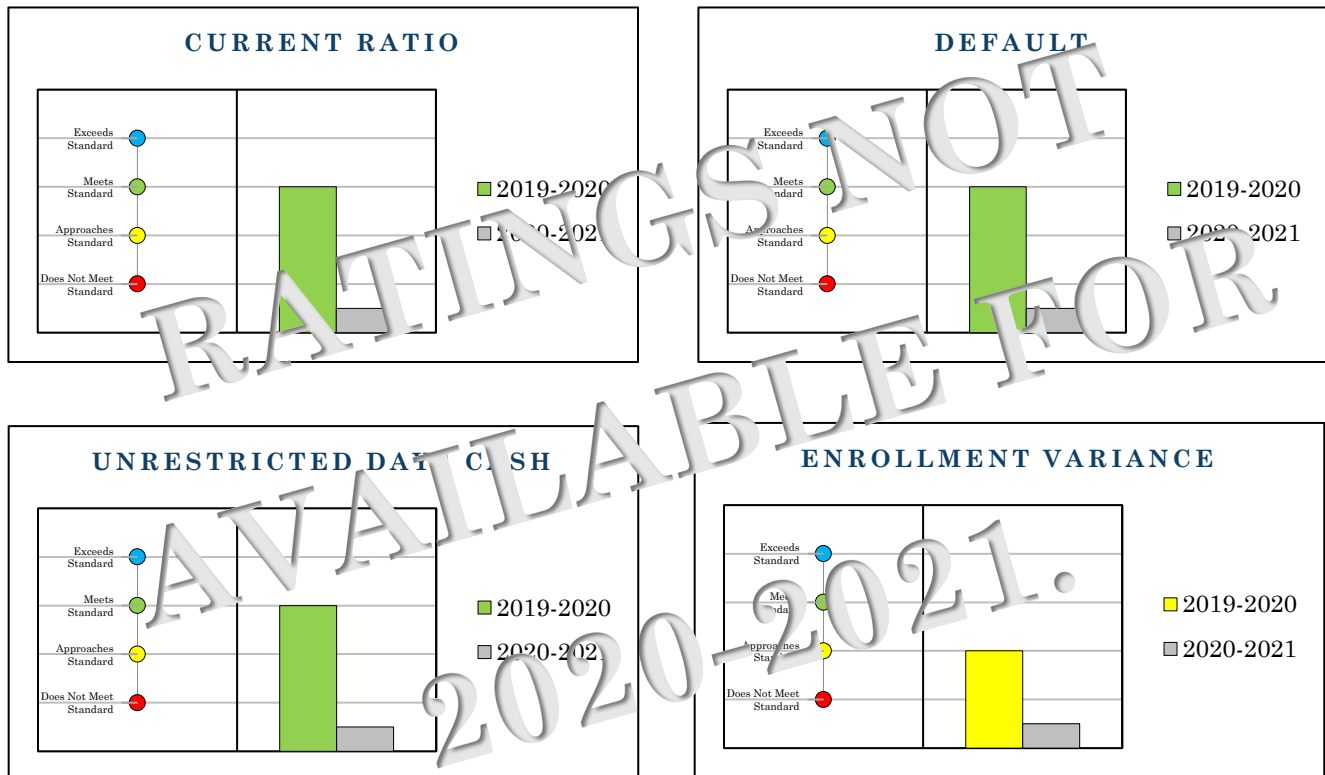
Notes: The 2020 framework revision removed the "cash ratio" measure and moved the existing enrollment variance measure to the financial section.

Due to the impact of the pandemic, financial outcomes are not rated for 2020-21. Additionally, the enrollment variance measure was calculated based on projected enrollment and actual enrollment (not ADA).

Financial Near Term Health Ratings | Historical Framework

School Year	Near Term Health Rating
2018-2019	HONOR

Financial Near Term Health Ratings | Revised Framework



Longitudinal Financial Ratings | 2017-2023

Longitudinal data provides a snapshot of a school's ratings over the school's current performance certificate (5 years). This data helps to identify performance trends and changes over time. Schools are encouraged to consider how this data might be used to drive your strategic planning as your school approach its next renewal decision.

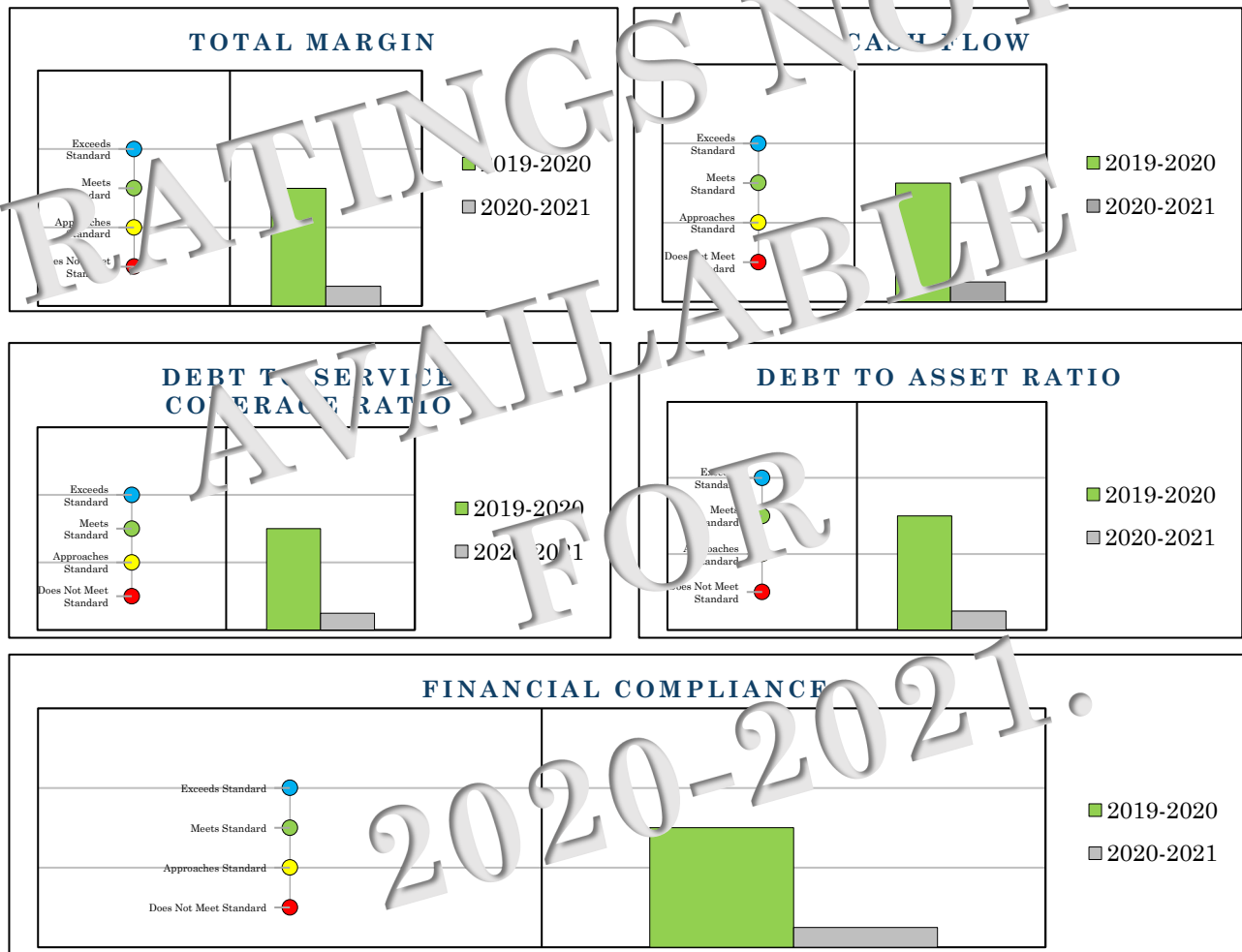
Notes: The 2020 framework revision removed the "cash ratio" measure and moved the existing enrollment variance measure to the financial section.

Due to the impact of the pandemic, financial outcomes are not rated for 2020-21. Additionally, the enrollment variance measure was calculated based on projected enrollment and actual enrollment (not ADA).

Financial Sustainability Ratings | Historical Framework

School Year	Sustainability Rating
2018-2019	HONOR

Financial Sustainability Ratings | Revised Framework



*The 2020-2021 Annual Report has been finalized by the
Idaho Public Charter School Commission staff.*

If you have any questions or comments, please contact
the IPCSC.



IDAHO PUBLIC CHARTER SCHOOL COMMISSION

304 N. 8th St. Ste.242

Boise, ID 83720

208-332-1561

pcsc@osbe.idaho.gov



Annual Performance Report 2021

Gem Prep Meridian

Mission Statement: To prepare students for success in college and professional technical careers by providing a high quality, personalized, relevant and rigorous education through exceptional teaching, innovative uses of technology and partnerships with families.

Chair/President	Dennis Turner
Administrator	Jason Bransford
Chief Financial Officer	Bryan Fletcher
School Location	2750 E. Gala Ct. Meridian
School Phone	208-269-1213

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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 includes a framework describing the expectations the school must meet in order to earn a next operational term. It also requires that charter school authorizer's complete performance reports for the schools they oversee each year. The annual performance report serves the following purposes:

1. To provide transparent information about charter school quality to the public;
2. To ensure charter school boards have access to clear expectations and;
3. To inform mid-term authorizing decisions.

This report 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.

Each measure included in the IPCSC'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, the IPCSC has suspended ratings (exceeds, meets, etc.) on academic and financial measures for the FY21 report. All outcomes are included in this report; however, outcomes are not rated.

Gem Prep: Meridian: [GPM Performance Certificate](#)

Performance Framework: [IPCSC Performance Framework](#)

Current Term: 2017-2023

School Overview

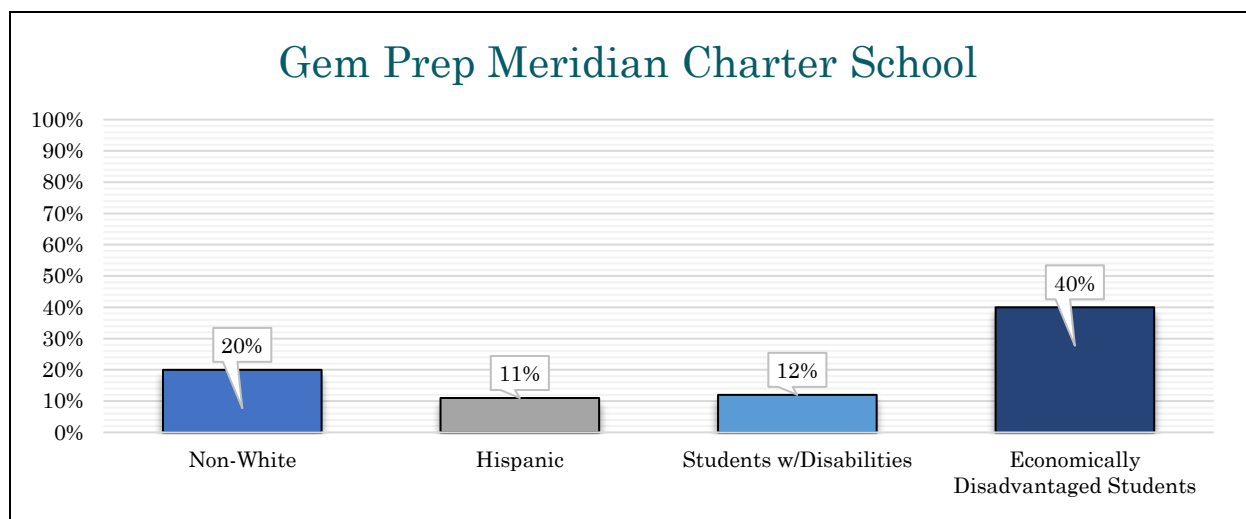
Model:	Blended Learning
Enrollment Capacity:	732
Grades Served:	K-12
Enrollment Projected FY22:	495

Key Design Elements:

The School shall implement and maintain the following essential design elements of its educational program: Gem Prep: Meridian will be grounded in 21st century learning and innovative school practices.

- High Expectations and Rigor. The school's focus will be on 21st century learning and critical thinking skills, as well as Common Core-alignment. Personalized learning does not effectively benefit students if students are working with content that is below their capacity. The quality and rigor of student work is framed by competency-based standards planning and challenging learning objectives and assessments. Additionally, students will be prepared for a post-secondary education through dual credit courses taken during high school and the alignment of curriculum with Common Core standards.
- Personalization. The blended learning, personalized instructional model is built on the belief that each student brings unique strengths and challenges to their learning experience and must be supported accordingly. Personalized learning includes working in adaptive online learning programs, working toward informed post-secondary goals, and utilizing flexible time at the secondary level for self-directed learning.
- Data. The school will be grounded in the importance of using data to drive instruction and will use formative assessment and other data to continually adjust instruction and necessary interventions.
- Innovation. Continual improvement and innovation are of considerable importance. The organization will constantly review performance data and make adjustments to the school model as necessary.

2021 GEM PREP MERIDIAN CHARTER SCHOOL DEMOGRAPHIC SUMMARY:



2020-2021 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.

RATING LEGEND	DOES NOT MEET STANDARD	APPROACHES STANDARD	MEETS STANDARD	EXCEEDS STANDARD	NOT RATED DUE TO PANDEMIC
------------------	---------------------------	------------------------	-------------------	---------------------	------------------------------

ACADEMIC OUTCOMES:	
Math Proficiency	57%
Math Growth	<i>Data Not Available for 2020-2021</i>
ELA Proficiency	70%
ELA Growth	<i>Data Not Available for 2020-2021</i>
Literacy Proficiency	FALL IRI: 77% SPRING IRI: 76%
College & Career Readiness	

FINANCIAL OUTCOMES: NEAR TERM MEASURES	
Current Ratio	11.86
Unrestricted Days Cash	175
Default	None
Enrollment Variance	97.01%

OPERATIONAL OUTCOMES: BOARD STEWARDSHIP	
Governance Structure	EXCEEDS STANDARD
Governance Oversight	EXCEEDS STANDARD
Governance Compliance	EXCEEDS STANDARD

FINANCIAL OUTCOMES: SUSTAINABILITY MEASURES	
Total Margin 3 Yr. Aggregate Margin	TM: 25.05% 3YR: 22.00%
Cash Flow Multi-Year Cash Flow	CF: \$891,532 MY: \$1,236,571
Debt Service Coverage Ratio	2.20
Debt Asset Ratio	0.08
Financial Compliance	Not Rated for 2020-2021

OPERATIONAL OUTCOMES: MANAGEMENT	
Student Services	EXCEEDS STANDARD
Data Security/Transparency	EXCEEDS STANDARD
Facility & Services	EXCEEDS STANDARD
Operational Compliance	EXCEEDS STANDARD

Note: Due to the impact of the pandemic, Academic outcomes were not available for the 2019-2020 school year. Academic outcomes are available but will not be rated for the 2020-2021 school year.

Academic Outcomes

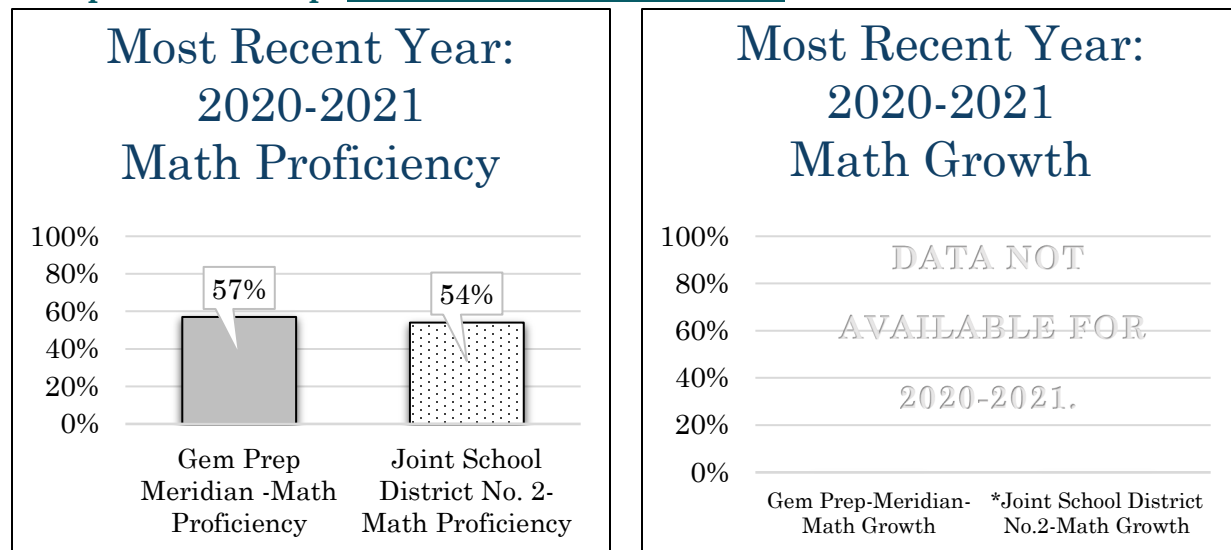
MATH PROFICIENCY & MATH GROWTH

Why This Matters:

The IPCSC must determine whether the academic performance at the school represents a favorable return on the investment of public dollars. For context, the IPCSC considers the school's performance in relation to other educational choices available to families. A school that performs as well or better than the average of its comparison group on the statewide mathematics assessment (ISAT) meets the IPCSC standard on both the math proficiency and math growth measures.

If this standard is not yet met, the school should focus its strategic planning on improving mathematics achievement outcomes to ensure the school will earn a next operational term. If the standard is met, strategic planning may focus on whatever data points will best establish and sustain an exemplary school of the specific model for which the school is chartered.

Comparison Group: Joint School District No. 2



RATING LEGEND	DOES NOT MEET STANDARD	APPROACHES STANDARD	MEETS STANDARD	EXCEEDS STANDARD	NOT RATED DUE TO PANDEMIC
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*Please see the [Performance Framework Rubrics](#) for details regarding how each measure is rated.

MEASURE	PROFICIENCY RATING	APPLICABLE RUBRIC DESCRIPTION
MATH PROFICIENCY	Rating Not Applicable for 2020-2021	Not Applicable for 2020-2021 School Year

MEASURE	GROWTH RATING	APPLICABLE RUBRIC DESCRIPTION
MATH GROWTH	Rating Not Applicable for 2020-2021	Not Applicable for 2020-2021 School Year

Academic Outcomes

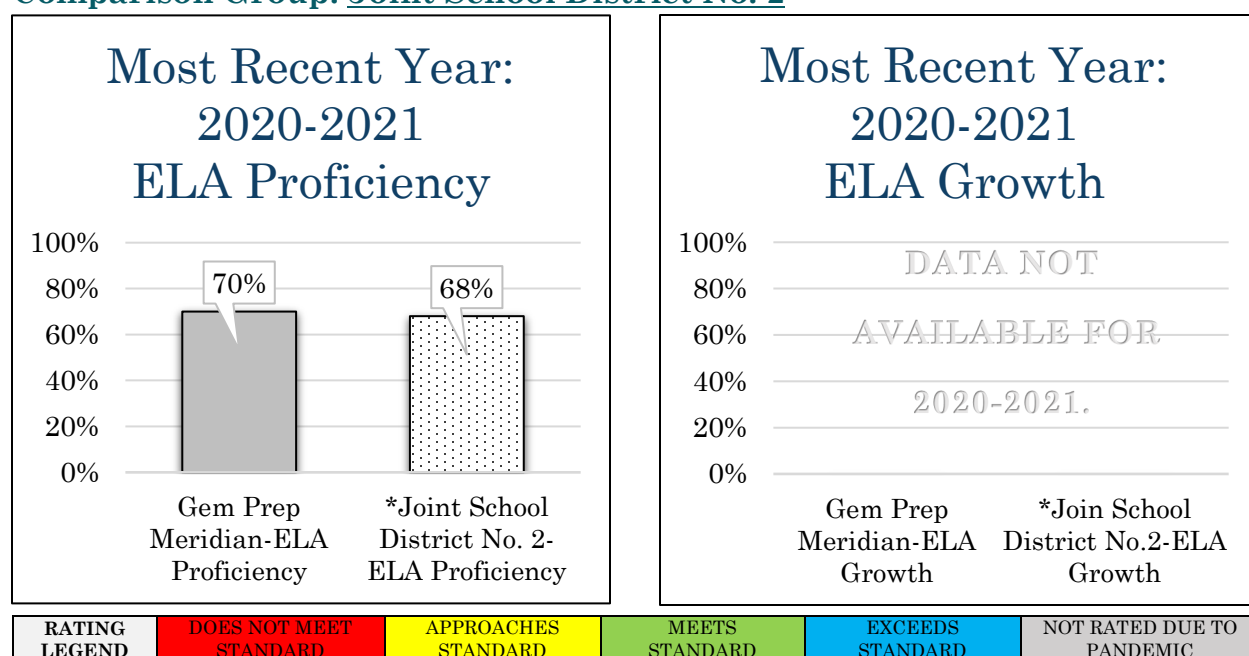
ELA PROFICIENCY & ELA GROWTH

Why This Matters:

The IPCSC must determine whether the academic performance at the school represents a favorable return on the investment of public dollars. For context, the IPCSC considers the school's performance in relation to other educational choices available to families. A school that performs as well or better than the average of its comparison group on the statewide ELA assessment (ISAT) meets the IPCSC standard on both the ELA proficiency and ELA growth measures.

If this standard is not yet met, the school should focus its strategic planning on improving these outcomes to ensure the school will earn a next operational term. If the standard is met, strategic planning may focus on whatever data points will best establish and sustain an exemplary school of the specific model for which the school is chartered.

Comparison Group: Joint School District No. 2



*Please see the [Performance Framework Rubrics](#) for details regarding how each measure is rated.

MEASURE	PROFICIENCY RATING	APPLICABLE RUBRIC DESCRIPTION
ELA PROFICIENCY	Rating Not Applicable for 2020-2021	Not Applicable for 2020-2021 School Year

MEASURE	GROWTH RATING	APPLICABLE RUBRIC DESCRIPTION
ELA GROWTH	Rating Not Applicable for 2020-2021	Not Applicable for 2020-2021 School Year

Academic Outcomes

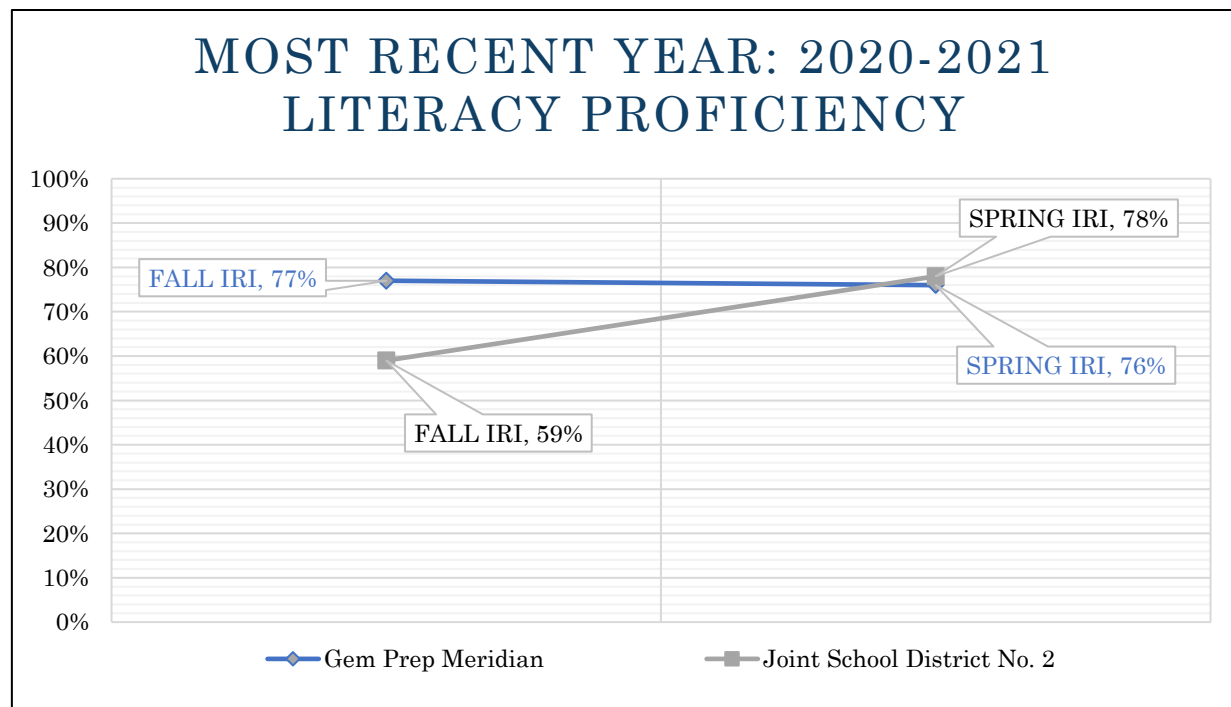
LITERACY PROFICIENCY

Why This Matters:

The IPCSC must determine whether the academic performance at the school represents a favorable return on the investment of public dollars. For context, the IPCSC considers the school's performance in relation to other educational choices available to families. A school that performs as well or better than the average of its comparison group on the spring statewide literacy assessment (IRI) meets the IPCSC standard. Alternatively, a school that did not perform as well or better than its comparison group on the spring assessment, but that did improve its outcome by at least 10% from fall to spring, also meets standard.

If this standard is not yet met, the school should focus its strategic planning on improving these outcomes to ensure the school will earn a next operational term. If the standard is met, strategic planning may focus on whatever data points will best establish and sustain an exemplary school of the specific model for which the school is chartered.

Comparison Group: Joint School District No. 2



RATING LEGEND	DOES NOT MEET STANDARD	APPROACHES STANDARD	MEETS STANDARD	EXCEEDS STANDARD	NOT RATED DUE TO PANDEMIC
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*Please see the [Performance Framework Rubrics](#) for details regarding how each measure is rated.

MEASURE	PROFICIENCY RATING	APPLICABLE RUBRIC DESCRIPTION
LITERACY PROFICIENCY	Rating Not Applicable for 2020-2021	Not Applicable for 2020-2021 School Year

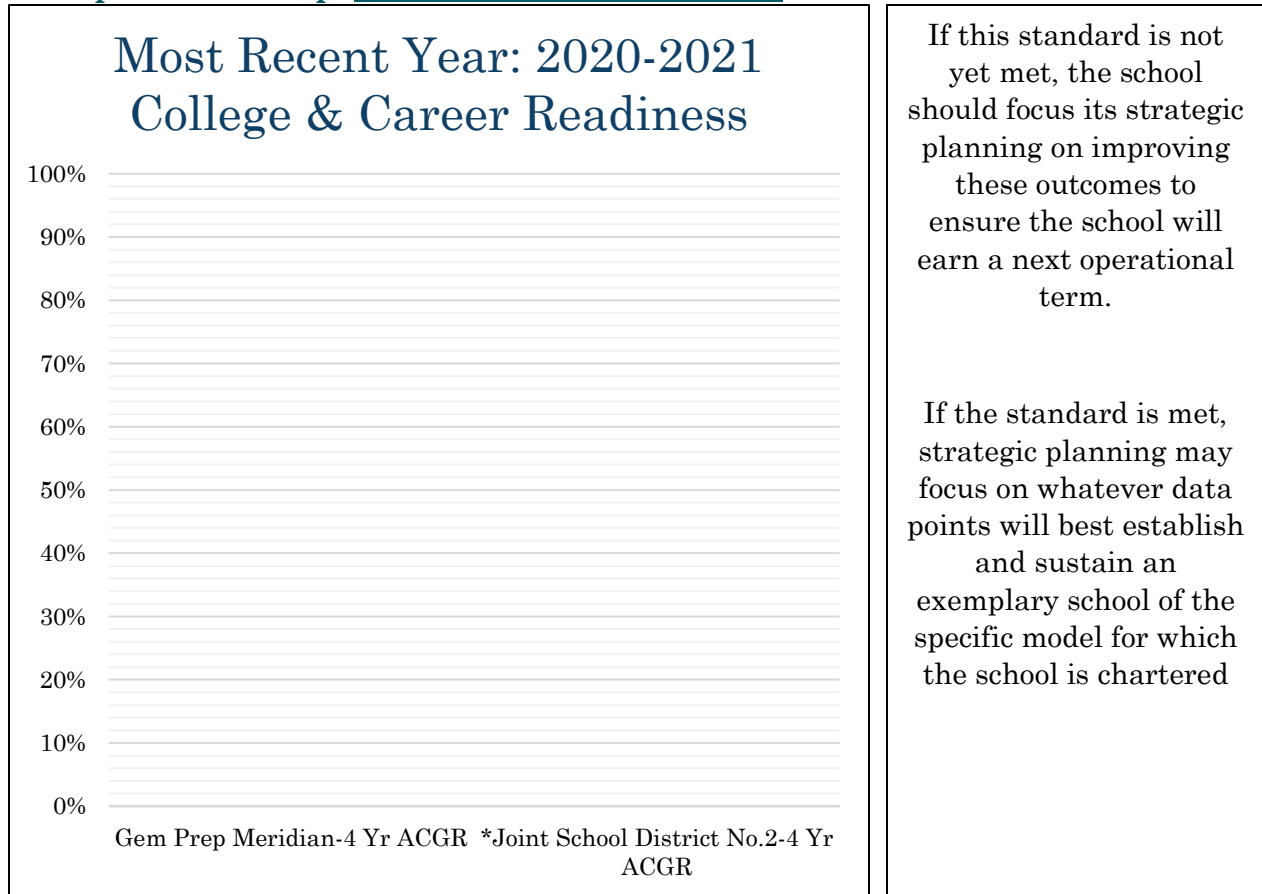
Academic Outcomes

COLLEGE & CAREER READINESS

Why This Matters:

The IPCSC must determine whether the academic performance at the school represents a favorable return on the investment of public dollars. For context, the IPCSC considers the school's performance in relation to other educational choices available to families. A school with a 4-year graduation rate equal to or greater than the average of its comparison group meets the IPCSC standard.

Comparison Group: Joint School District No.2



RATING LEGEND	DOES NOT MEET STANDARD	APPROACHES STANDARD	MEETS STANDARD	EXCEEDS STANDARD	NOT RATED DUE TO PANDEMIC
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*Please see the [Performance Framework Rubrics](#) for details regarding how each measure is rated.

MEASURE	COLLEGE & CAREER RATING	APPLICABLE RUBRIC DESCRIPTION
College & Career Readiness	Ratings Not Applicable for 2020-2021	Not Applicable for 2020-2021 School Year.

Longitudinal Academic Ratings | 2017-2023

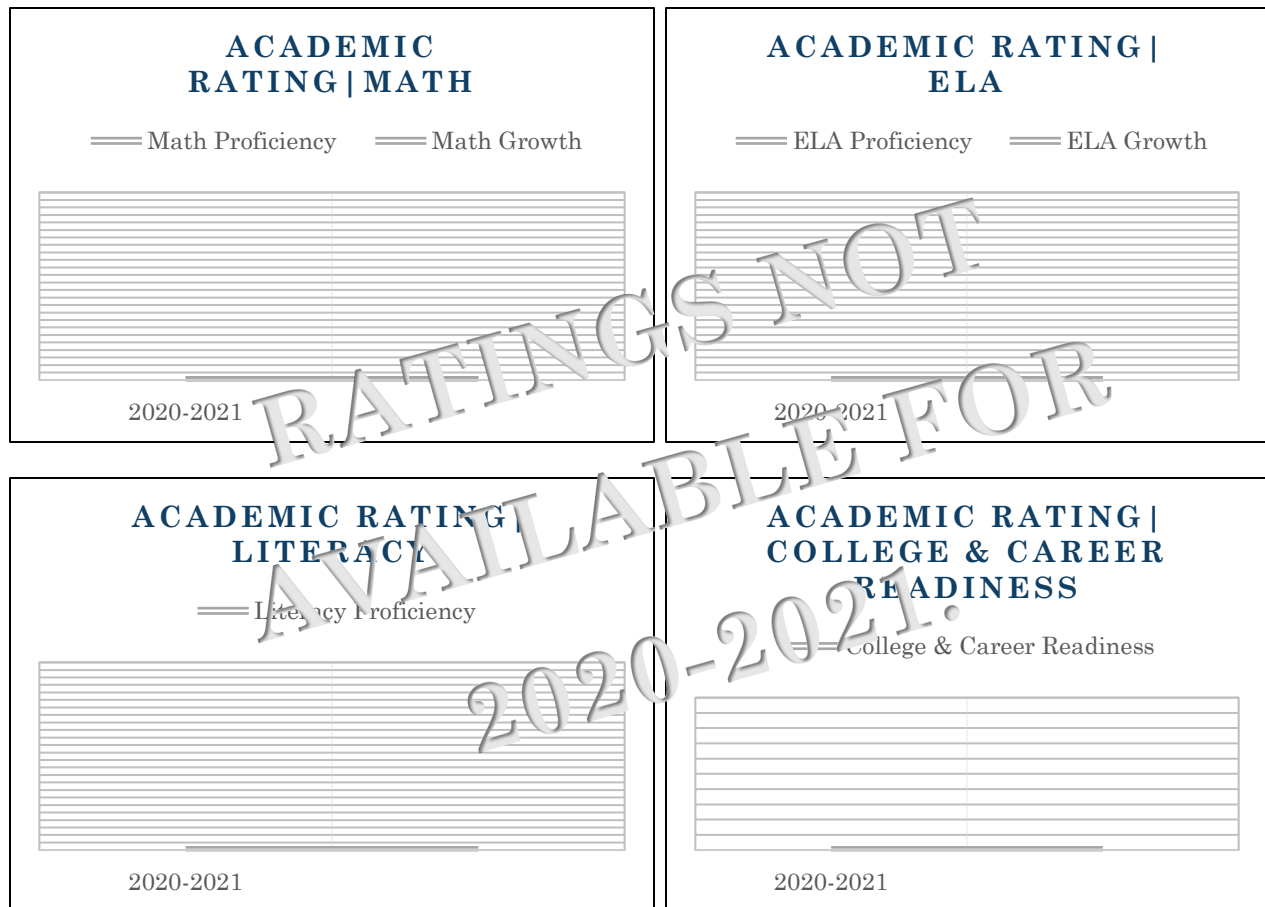
Longitudinal data provides a snapshot of a school's ratings over the school's current performance certificate (5 years). This data helps to identify performance trends and changes over time. Schools are encouraged to consider how this data might be used to drive strategic planning as the school approach its next renewal decision.

Academic Ratings | Historical Framework

SCHOOL YEAR	ACADMEIC GEN ED OUTCOME
2018-2019	GOOD STANDING
2019-2020	NOT RATE DUE TO PANDEMIC

Academic Ratings | Revised Framework

Due to COVID-19 pandemic, no academic data was available for the 2019-2020 school year. Additionally, as ratings are sued to inform charter renewal decisions, the IPCSC chose to suspend ratings for the 2020-21 school year due to the anticipated impact of the pandemic.



RATING LEGEND	DOES NOT MEET STANDARD	APPROACHES STANDARD	MEETS STANDARD	EXCEEDS STANDARD	NOT RATED DUE TO PANDEMIC
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Operational Outcomes

BOARD STEWARDSHIP

Why This Matters:

At the highest level, the success of a charter school is driven by the ability of its governing board to govern effectively. The measures in this section help identify the strengths and challenges faced by the school's board. As success on these measures was not unduly influenced by the pandemic, ratings are applied for the 2020-2021 school year. *Please see the [Performance Framework Rubrics](#) for details regarding how each measure is rated.

STANDARD RATING: EXCEEDS STANDARD	
Governance Structure Measure	Data/Evidence Source
The board bylaws are compliant with ID law.	Bylaws 10/11/2017. *Please provide an updated copy if any amendments have been made as of 7/1/2021.
The school's articles of incorporation are current.	Articles of Incorporation initially filed on 12/23/2016. Most recently updated on 3/28/2017.
The board does operate in compliance with its bylaws.	*No instances of non-compliance documented.
Investigations were not conducted into 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.
Comments/ Context:	

STANDARD RATING: EXCEEDS STANDARD	
Governance Oversight Measure	Data/Evidence Source
The IPCSC did not evaluate the boards review of academic data in a timely and thorough manner due to pandemic for 2020-2021.	*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.
Comments/ Context:	

STANDARD RATING: EXCEEDS STANDARD	
Governance Compliance Measure	Data/Evidence Source
The IPCSC 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.
Comments/ Context:	

Operational Outcomes

MANAGEMENT

Why This Matters:

The systems and structures that support school operations are an important part of the school's overall success. The measures in this section help identify the strengths and challenges that impact the school's day-to-day operations. As success on these measures was not unduly influenced by the pandemic, ratings are applied for the 2020-2021 school year.

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 2020-2021
Comments/ Context:	

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.
Comments/ Context:	

STANDARD RATING: EXCEEDS STANDARD	
Facility and Services	Data/Evidence Source
The school's occupancy certificate is current.	*No instances of non-compliance documented.
Safety inspections and evacuation drills are compliant.	*Most Recent: 5/6/2021 No instances of non-compliance documented.
<i>The IPCSC did not evaluate school transportation for students due to measure being waived for 2020-2021.</i>	*No instances of non-compliance documented.
<i>The IPCSC did not evaluate school nutrition for students due to measure being waived for 2020-2021</i>	*No instances of non-compliance documented.
Comments/ Context:	

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.
Choose an item.	*No instances of non-compliance documented.
Comments/ Context:	

Longitudinal Operational Ratings | 2017-2023

Board Stewardship

Longitudinal data provides a snapshot of a school's ratings over the school's current performance certificate (5 years). This data helps to identify performance trends and changes over time. Schools are encouraged to consider how this data might be used to drive your strategic planning as your school approach its next renewal decision.

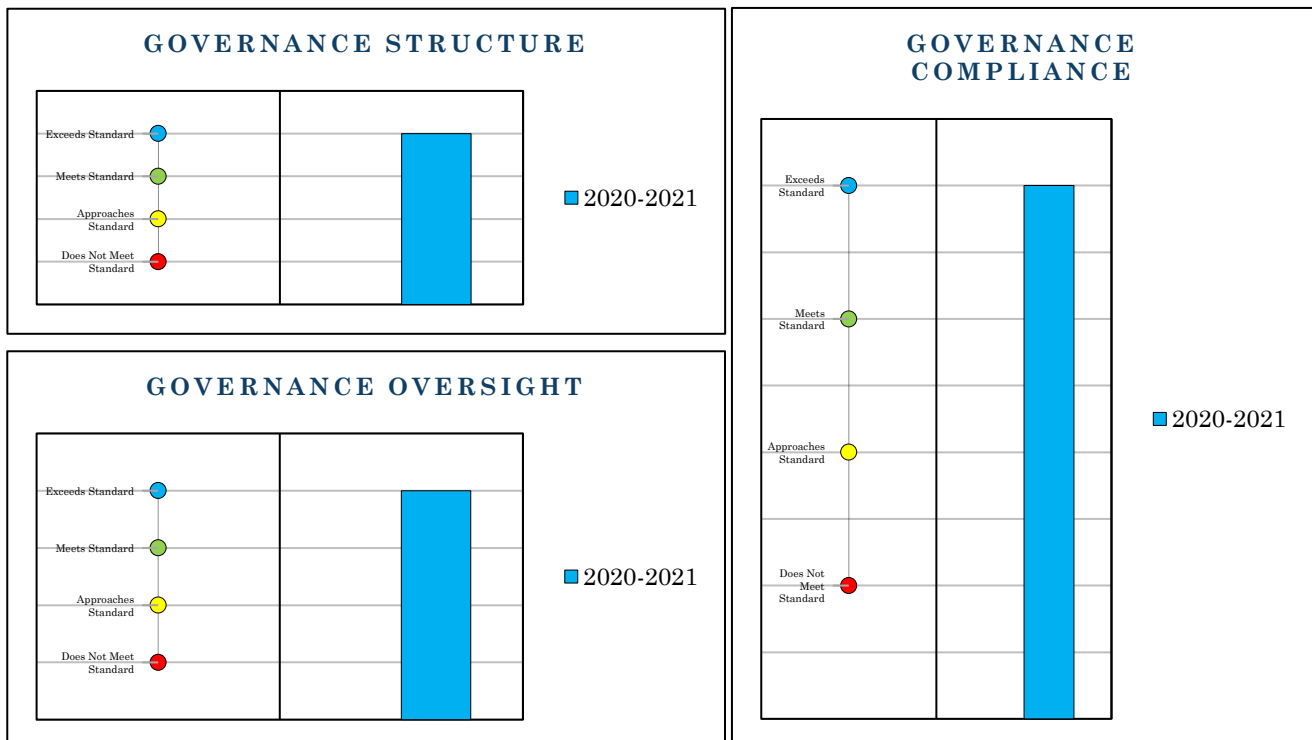
Ratings on the historical and revised framework are not comparable in the operational section. The two sets of data have been included. The school's operational ratings on the historical framework are provided for reference.

Operational Ratings | Historical Framework

School Year	Rating
2018-2019	HONOR
2019-2020	HONOR

Note: In 2020, the IPCSC reorganized these measures for clarity. Operational outcomes are now divided into two sections (board stewardship and management) based on the primary party responsible for the school's success on each measure.

Operational Ratings: Board Stewardship | Revised Framework



Longitudinal Operational Ratings | 2017-2023

Management

Longitudinal data provides a snapshot of a school's ratings over the school's current performance certificate (5 years). This data helps to identify performance trends and changes over time. Schools are encouraged to consider how this data might be used to drive your strategic planning as your school approach its next renewal decision.

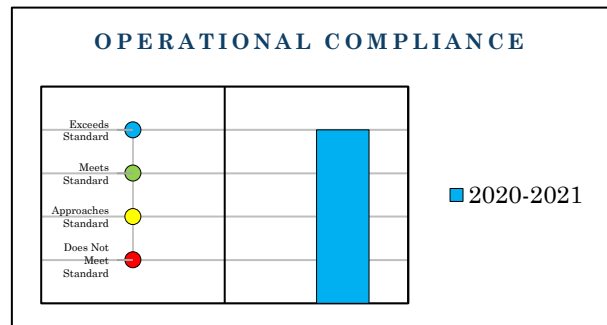
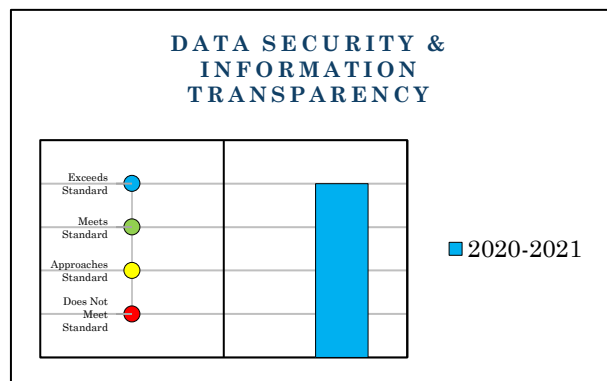
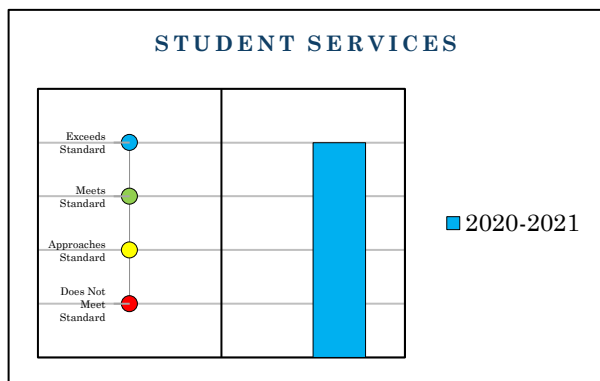
Ratings on the historical and revised framework are not comparable in the operational section. The two sets of data have been included. The school's operational ratings on the historical framework are provided for reference.

Operational Ratings | Historical Framework

School Year	Rating
2018-2019	HONOR
2019-2020	HONOR

Note: In 2020, the IPCSC reorganized these measures for clarity. Operational outcomes are now divided into two sections (board stewardship and management) based on the primary party responsible for the school's success on each measure.

Operational Ratings: Management | Revised Framework



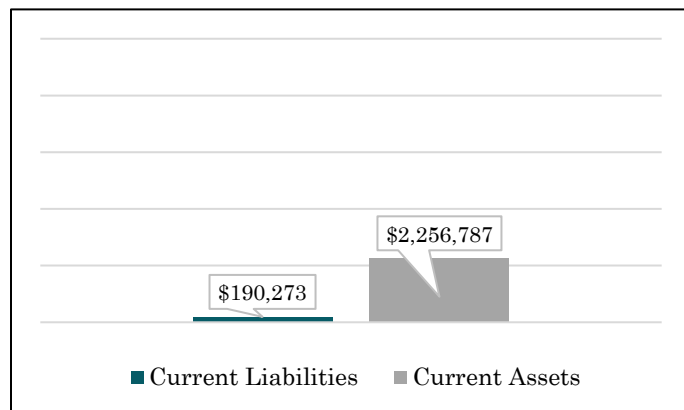
Financial Outcomes

NEAR TERM MEASURES

These measures evaluate whether a school is likely to meet its financial obligations in the next year.
 *Please see the [Performance Framework Rubrics](#) for details regarding how each measure is rated.

Current Ratio

The school has a current ratio of more than 1.5.	Current Ratio 11.86	Ratings Not Applicable for 2020-2021
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Why This Matters:

Current Ratio is a comparison of a school's financial obligations due within one year (current liabilities) to the cash and investments held by the school (current assets).

A school with more assets than liabilities (a Current Ratio greater than 1.0) would be able to meet its financial obligations for the

next year without relying on future revenue.

A school with more liabilities than assets (a Current Ratio of less than 1.0) is dependent on revenue it has not yet received to meet existing financial obligations.

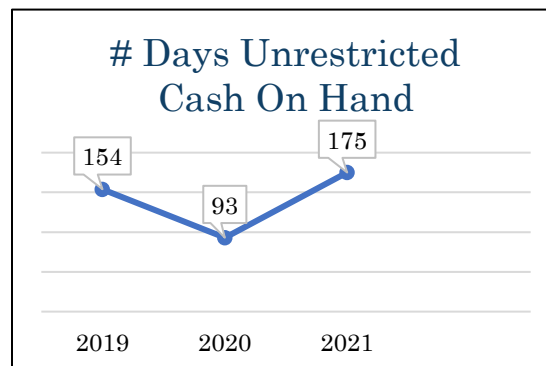
Unrestricted Days Cash

The school has more than 60 days cash on hand	175 Days	Ratings Not Applicable for 2020-2021
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Why this Matters:

This measure estimates a school's average daily cost of operations and considers the number of days a school could operate using only its available cash and investments.

A school with at least 60 days cash on hand would be able to meet its immediate financial obligations with available cash, buying the time it might take to access other current assets. Occasionally, a planned purchase may decrease this number temporarily. In those cases, 30-60 days cash on hand with an upward trend is acceptable. A school with less than 15 days cash on hand is in financial distress and is at risk of automatic closure.



Default

The school is not in default of any financial obligations and did not experience any instances of default during the fiscal year.	Ratings Not Applicable for 2020-2021
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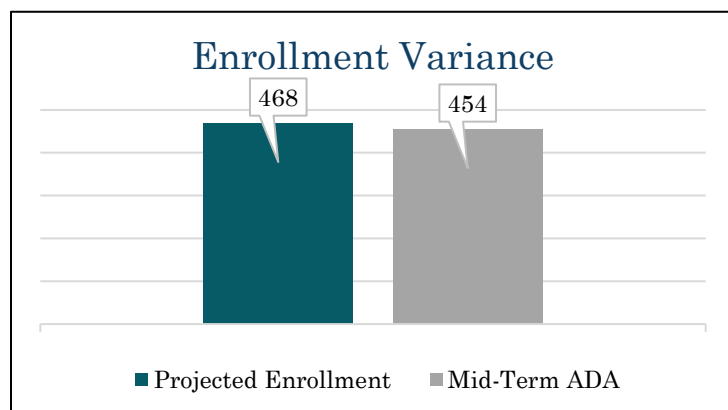
Why this Matters:

This measure identifies whether a school has defaulted on any of its financial obligations. Default can mean many things. Examples of default include: paying bills late, failing to make payroll, or inaccurately filing reports required for funding. Default can also include a failure to meet any additional requirements of long-term debt as established by the lender (such as meeting a specific enrollment target or maintaining a greater amount of cash on hand than the PCSC requires).

Any act of default can result in disruption of services, loans being called due, or funding that is inaccurate or withheld.

Enrollment Variance

The school achieved and sustained at least 95% of its projected enrollment during the most recent school year.	Enrollment Variance 97.01%	Ratings Not Applicable for 2020-2021
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Why this Matters:

The Enrollment Variance measure considers what percentage of a school's projected enrollment was achieved. As the majority of a public school's funding is generated by student enrollment, this measure reflects a school's ability to execute its budget to plan.

A school that achieves at least 95% of its projected enrollment will likely experience few bumps and may make minor adjustments. A school that achieves less than 95% of projected enrollment is likely to face budget challenges requiring more significant budget amendments and may be in financial distress.

Financial Outcomes

SUSTAINABILITY MEASURES

These measures help determine whether a school is likely to remain financially stable into the future.

Total Margin

The school has maintained a positive total margin for at least 3 consecutive years.	CY Total Margin 25.05% 3-Year Aggregated 22.00%	Ratings Not Applicable for 2020-2021
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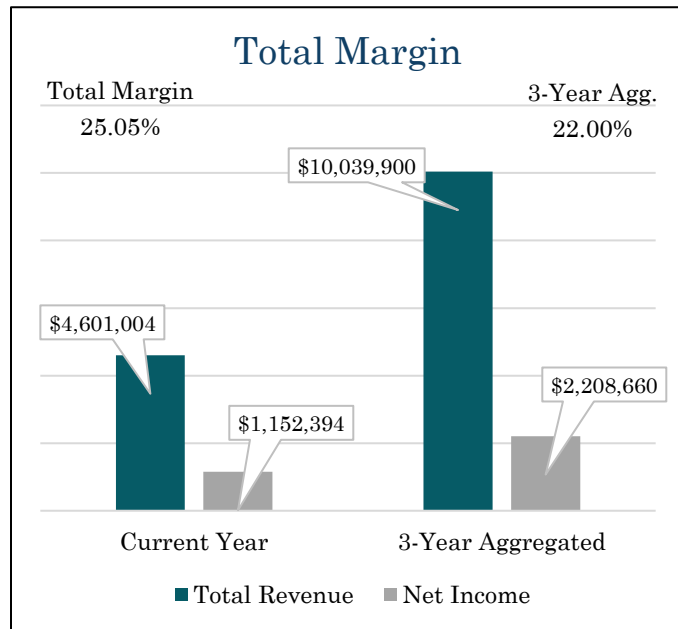
Why this Matters:

The Total Margin compares a school's total revenue to its net income. Specifically, this measure identifies what percentage of a school's total revenue in a given year was not expended during that year. A school with a positive total margin spent less than it brought in. That is, the school is living within its means and can plan for future purchases and investments.

An occasional negative total margin may indicate that a planned or necessary purchase has taken place. This is not necessarily a negative indicator.

However, if the Total Margin is chronically negative or severe decreases appear, the school may be in financial distress. Aggregating this margin over three years helps to identify these long-term trends.

Note: for the purposes of this calculation, pension liability is excluded from the school's net income.



Cash Flow

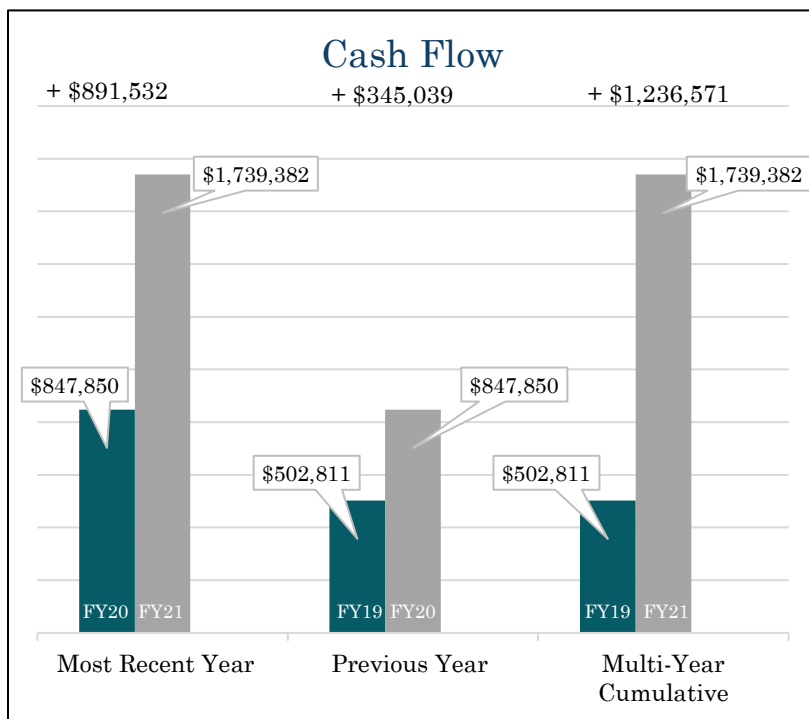
The school's multi-year cumulative cash flow has been positive, and the most recent year's cash flow has been positive for at least 3 consecutive years.	Most Recent Year \$891,532 Previous Year \$345,039 Multi-Year \$1,236,571	Ratings Not Applicable for 2020-2021
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Why this Matters:

The Cash Flow measure considers the change in a school's cash balance over time. A school with a positive cash flow is increasing its reserves and is likely able to fund future projects and purchases.

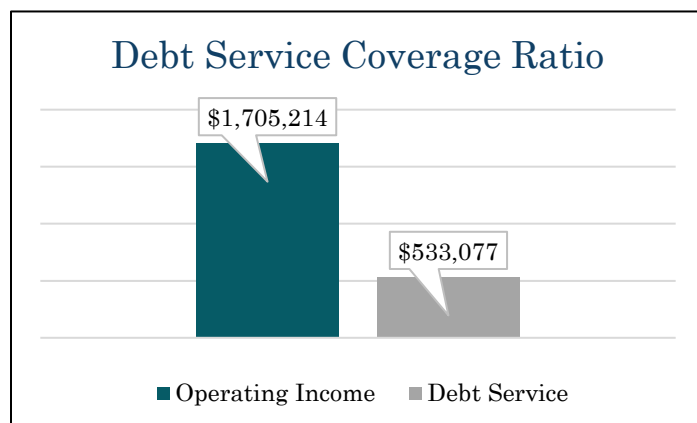
A school with a negative cash flow is using its existing reserves to fund general operations and is not likely to have the financial flexibility to fund future plans.

A multi-year cumulative cash flow helps to identify long-term trends.



Debt Service Coverage Ratio

The school's debt service coverage ratio is 1.5 or greater.	Debt Service Coverage Ratio 2.20	Ratings Not Applicable for 2020-2021
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Why this Matters:

This measure evaluates a school's ability to make payments on debt due in a given year using only that year's income. This helps determine whether a school has more debt than it can manage.

A school with more Operating Income than Debt Service (a Debt Service Coverage Ratio greater than 1) can meet the financial obligations of their debt. A

school with more Debt Service than Operating Income (a ratio of less than 1) is reliant on either reserves or revenues anticipated in future years to meet its debt obligations.

Debt to Asset Ratio

The school has maintained a debt to asset ratio less than .9 for at least 3 consecutive years.	Debt/Asset Ratio .08	Ratings Not Applicable for 2020-2021
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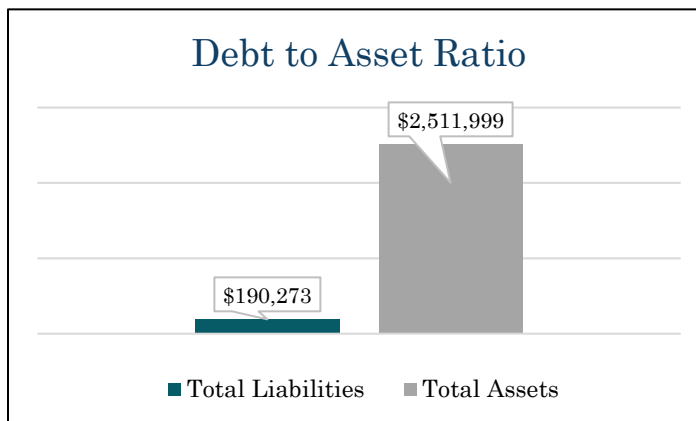
Why This Matters:

The Debt to Asset Ratio compares a school's total liabilities to its total assets. This helps determine whether a school would be able to meet both its short and long-term financial obligations.

A school whose total liabilities are 90% or less of its Total Assets is

likely to be able to repay all short-term debts and still manage to set its long-term affairs in order in a worst-case scenario. A school with more liabilities than assets would not be able to meet all its financial obligations in a worst-case scenario.

Note: for the purposes of this measure, pension liability is excluded from the school's total liabilities.



Financial Compliance

STANDARD RATING: NOT RATED FOR 2020-2021	
Financial Operations	Data and/or Evidence Source
The school's finances are managed in compliance with GAAP.	Financial Audit 11/3/2021
Expenditures and contracts are posted online appropriately.	School's Expenditure Page 7/30/2021
The school maintains compliant internal controls.	*No instances of non-compliance documented.
The school is not operating under a Notification of Fiscal Concern.	*No instances of non-compliance documented.
The school is not operating under a Notification of Possible or Imminent Closure.	*No instances of non-compliance documented.
Comments/Context	

Longitudinal Financial Ratings | 2017-2023

Longitudinal data provides a snapshot of a school's ratings over the school's current performance certificate (5 years). This data helps to identify performance trends and changes over time. Schools are encouraged to consider how this data might be used to drive your strategic planning as your school approach its next renewal decision.

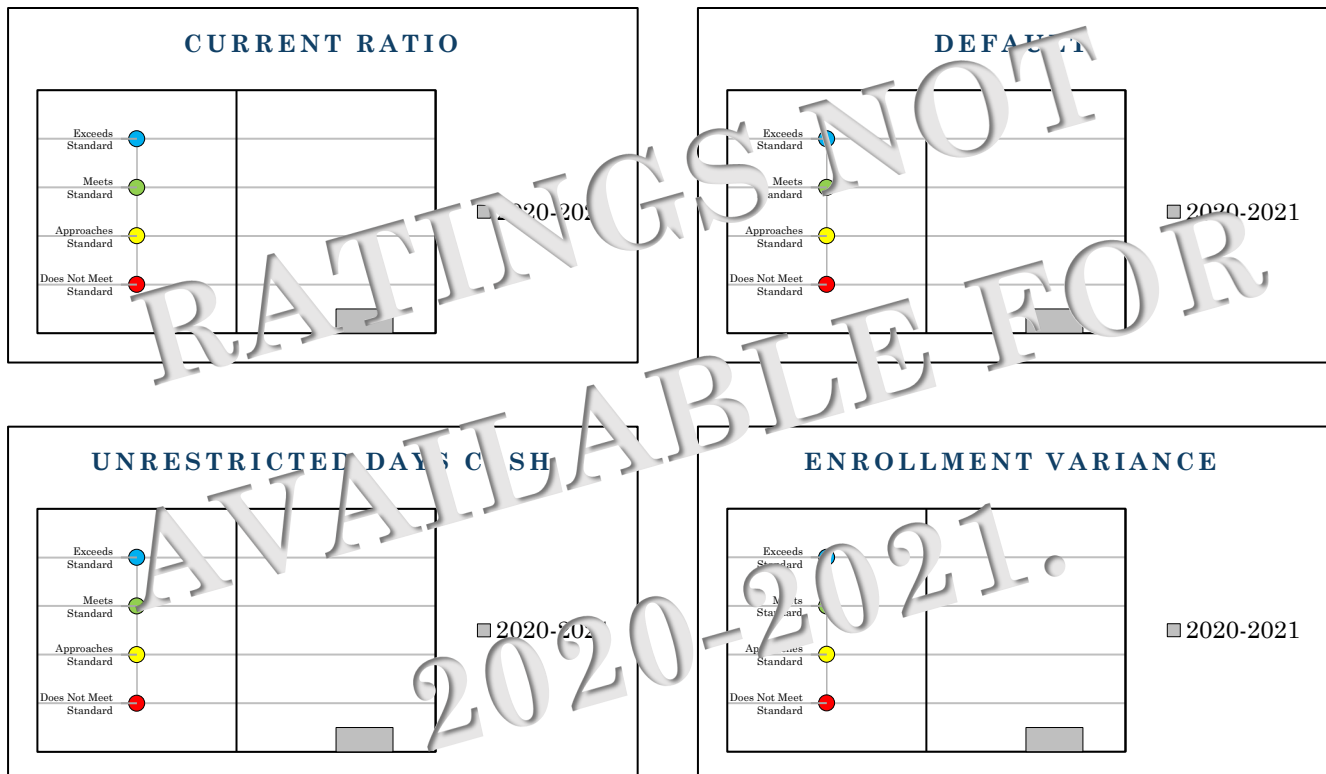
Notes: The 2020 framework revision removed the "cash ratio" measure and moved the existing enrollment variance measure to the financial section.

Due to the impact of the pandemic, financial outcomes are not rated for 2020-21. Additionally, the enrollment variance measure was calculated based on projected enrollment and actual enrollment (not ADA).

Financial Near Term Health Ratings | Historical Framework

School Year	Near Term Health Rating
2018-2019	HONOR
2019-2020	HONOR

Financial Near Term Health Ratings | Revised Framework



Longitudinal Financial Ratings | 2017-2023

Longitudinal data provides a snapshot of a school's ratings over the school's current performance certificate (5 years). This data helps to identify performance trends and changes over time. Schools are encouraged to consider how this data might be used to drive your strategic planning as your school approach its next renewal decision.

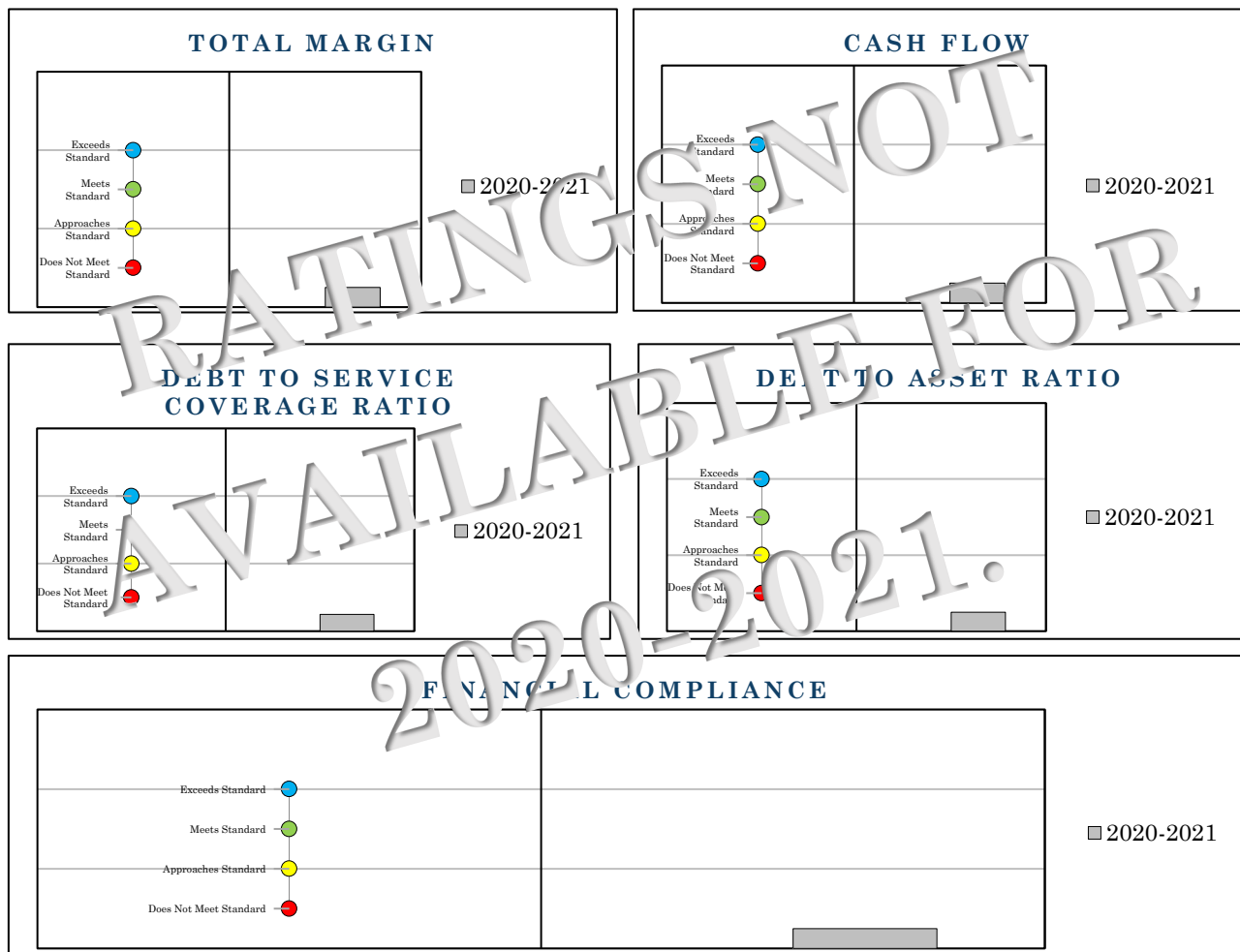
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Due to the impact of the pandemic, financial outcomes are not rated for 2020-21. Additionally, the enrollment variance measure was calculated based on projected enrollment and actual enrollment (not ADA).

Financial Sustainability Ratings | Historical Framework

School Year	Sustainability Rating
2018-2019	HONOR
2019-2020	HONOR

Financial Sustainability Ratings | Revised Framework



*The 2020-2021 Annual Report has been finalized by the
Idaho Public Charter School Commission staff.*

If you have any questions or comments, please contact
the IPCSC.



IDAHO PUBLIC CHARTER SCHOOL COMMISSION

304 N. 8th St. Ste.242

Boise, ID 83720

208-332-1561

pcsc@osbe.idaho.gov



Annual Performance Report 2021

Heritage Community Charter School, Inc.

Mission Statement:

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

Chair/President	TJ Frans
Treasurer	Martin Flaherty
Secretary	Sheri Blaisdell
Administrator	Javier Castaneda
Business Manager	Nancy Dayhoff
School Location	1803 East Ustick Road Caldwell
School Phone	208-453-8070

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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 includes a framework describing the expectations the school must meet in order to earn a next operational term. It also requires that charter school authorizer's complete performance reports for the schools they oversee each year. The annual performance report serves the following purposes:

1. To provide transparent information about charter school quality to the public;
2. To ensure charter school boards have access to clear expectations and;
3. To inform mid-term authorizing decisions.

This report 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.

Each measure included in the IPCSC'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, the IPCSC has suspended ratings (exceeds, meets, etc.) on academic and financial measures for the FY21 report. All outcomes are included in this report; however, outcomes are not rated.

Heritage Community Charter School, Inc. Performance Certificate: [HCCS Performance Certificate](#)

Performance Framework: [IPCSC Performance Framework](#)

Current Term: 2018-2023

School Overview

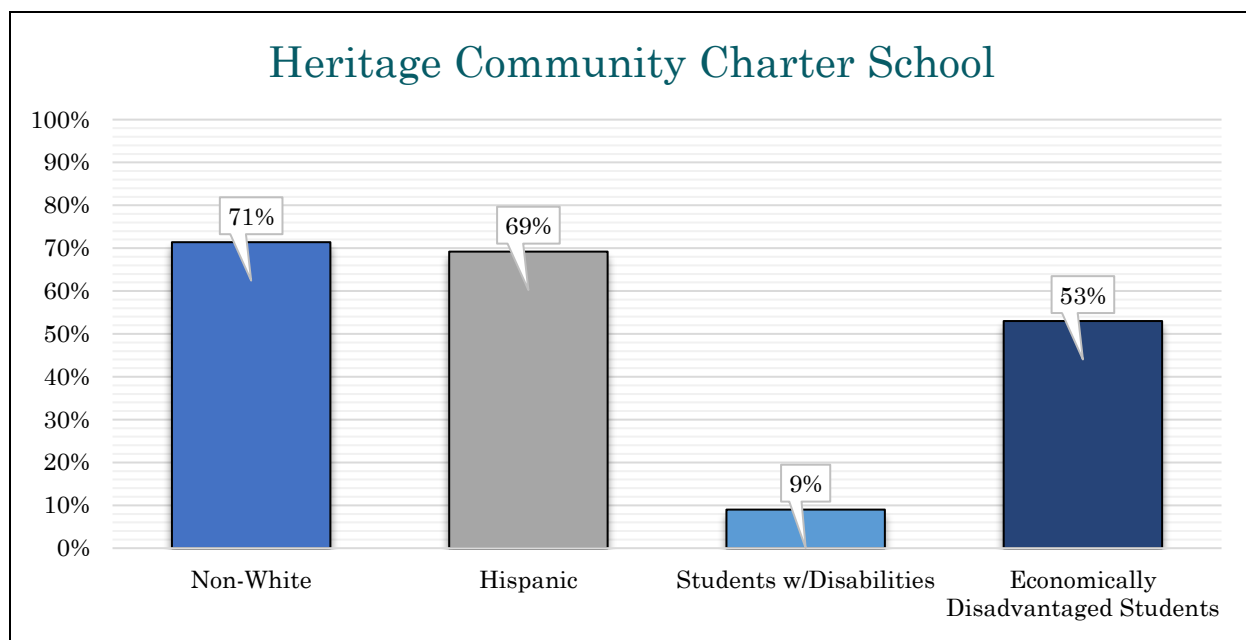
Model:	Dual Language Spanish Immersion and Classical
Enrollment Capacity:	540
Grades Served:	K-8
Enrollment Projected FY22:	500

Key Design Elements:

The School shall implement and maintain the following essential design elements of its educational program:

K-5 Dual Language Spanish Immersion Program to foster secondary language development, a Classical Liberal Arts curriculum to foster development of high order thinking in all grades utilizing the Core Knowledge Sequence as the framework, and offering Spanish and Logic in the middle school grades. HCCS will also continue a strong character education program.

2021 HERITAGE COMMUNITY CHARTER SCHOOL DEMOGRAPHIC SUMMARY:



2020-2021 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.

RATING LEGEND	DOES NOT MEET STANDARD	APPROACHES STANDARD	MEETS STANDARD	EXCEEDS STANDARD	NOT RATED DUE TO PANDEMIC
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ACADEMIC OUTCOMES:	
Math Proficiency	20%
Math Growth	<i>Data Not Available for 2020-2021</i>
ELA Proficiency	42%
ELA Growth	<i>Data Not Available for 2020-2021</i>
Literacy Proficiency	FALL IRI: 34% SPRING IRI: 50%

FINANCIAL OUTCOMES: NEAR TERM MEASURES	
Current Ratio	2.50
Unrestricted Days Cash	240
Default	None
Enrollment Variance	94.03%

OPERATIONAL OUTCOMES: BOARD STEWARDSHIP	
Governance Structure	EXCEEDS STANDARD
Governance Oversight	EXCEEDS STANDARD
Governance Compliance	EXCEEDS STANDARD

FINANCIAL OUTCOMES: SUSTAINABILITY MEASURES	
Total Margin	TM: 4.73%
3 Yr. Aggregate Margin	3YR: 10.93%
Cash Flow	CF: \$373,075
Multi-Year Cash Flow	MY: \$1,615,291
Debt Service Coverage Ratio	1.44
Debt Asset Ratio	.86
Financial Compliance	Not Rated for 2020-2021

OPERATIONAL OUTCOMES: MANAGEMENT	
Student Services	EXCEEDS STANDARD
Data Security/Transparency	EXCEEDS STANDARD
Facility & Services	EXCEEDS STANDARD
Operational Compliance	EXCEEDS STANDARD

Note: Due to the impact of the pandemic, Academic outcomes were not available for the 2019-2020 school year. Academic outcomes are available but will not be rated for the 2020-2021 school year.

Academic Outcomes

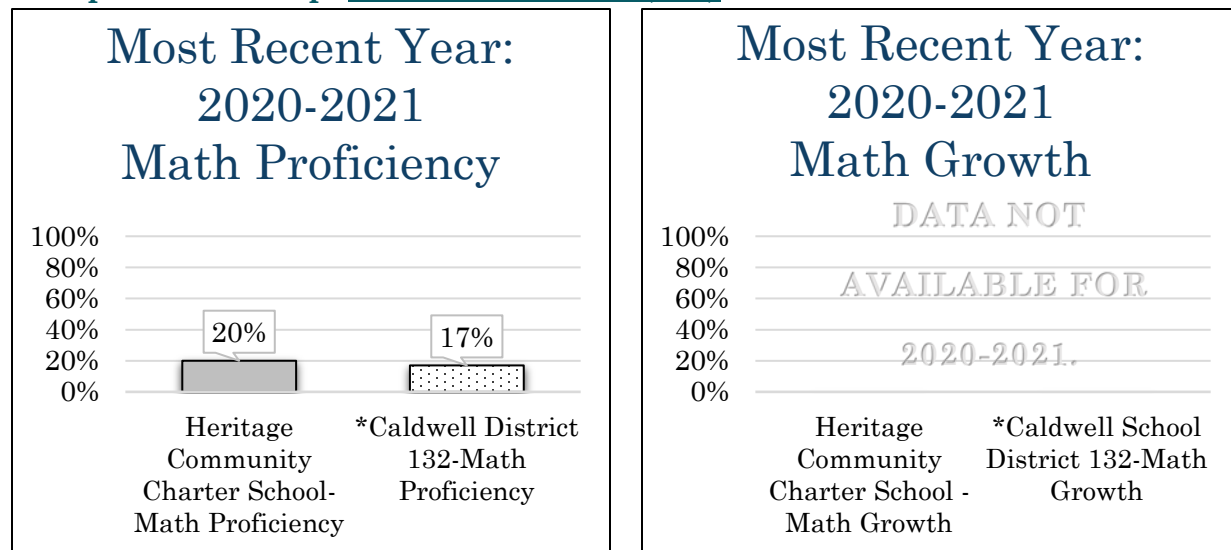
MATH PROFICIENCY & MATH GROWTH

Why This Matters:

The IPCSC must determine whether the academic performance at the school represents a favorable return on the investment of public dollars. For context, the IPCSC considers the school's performance in relation to other educational choices available to families. A school that performs as well or better than the average of its comparison group on the statewide mathematics assessment (ISAT) meets the IPCSC standard on both the math proficiency and math growth measures.

If this standard is not yet met, the school should focus its strategic planning on improving mathematics achievement outcomes to ensure the school will earn a next operational term. If the standard is met, strategic planning may focus on whatever data points will best establish and sustain an exemplary school of the specific model for which the school is chartered.

Comparison Group: Caldwell District (132)



RATING LEGEND	DOES NOT MEET STANDARD	APPROACHES STANDARD	MEETS STANDARD	EXCEEDS STANDARD	NOT RATED DUE TO PANDEMIC
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*Please see the [Performance Framework Rubrics](#) for details regarding how each measure is rated.

MEASURE	PROFICIENCY RATING	APPLICABLE RUBRIC DESCRIPTION
MATH PROFICIENCY	Rating Not Applicable for 2020-2021	Not Applicable for 2020-2021 School Year

MEASURE	GROWTH RATING	APPLICABLE RUBRIC DESCRIPTION
MATH GROWTH	Rating Not Applicable for 2020-2021	Not Applicable for 2020-2021 School Year

Academic Outcomes

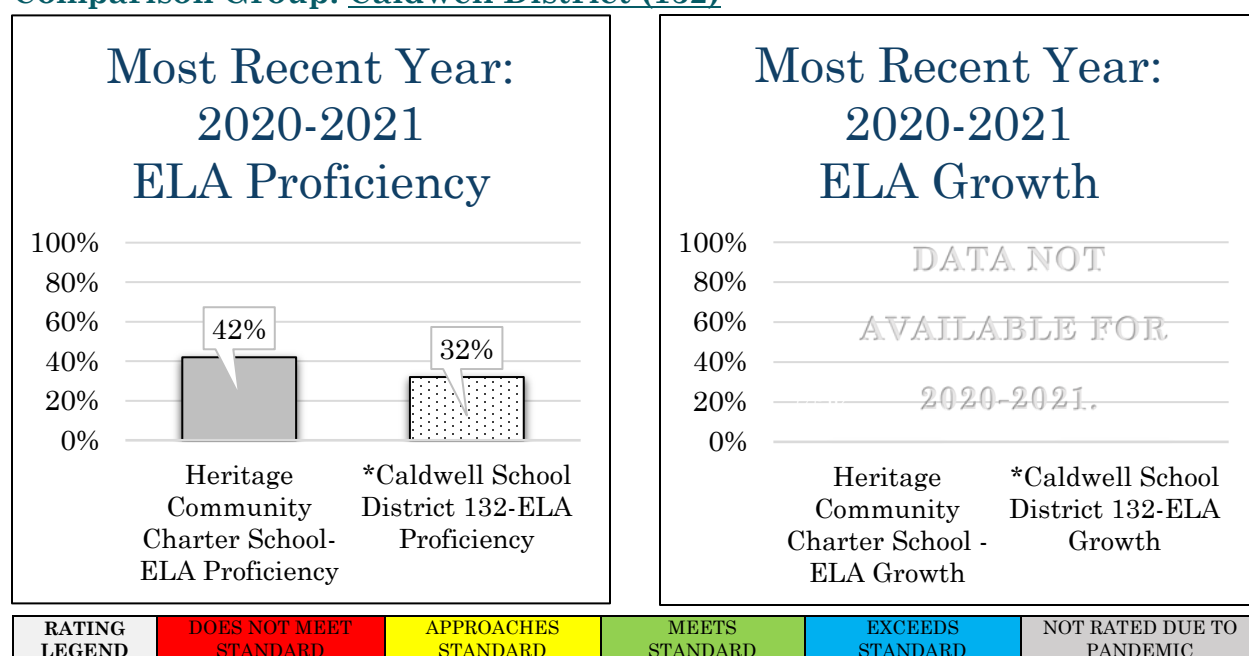
ELA PROFICIENCY & ELA GROWTH

Why This Matters:

The IPCSC must determine whether the academic performance at the school represents a favorable return on the investment of public dollars. For context, the IPCSC considers the school's performance in relation to other educational choices available to families. A school that performs as well or better than the average of its comparison group on the statewide ELA assessment (ISAT) meets the IPCSC standard on both the ELA proficiency and ELA growth measures.

If this standard is not yet met, the school should focus its strategic planning on improving these outcomes to ensure the school will earn a next operational term. If the standard is met, strategic planning may focus on whatever data points will best establish and sustain an exemplary school of the specific model for which the school is chartered.

Comparison Group: Caldwell District (132)



*Please see the [Performance Framework Rubrics](#) for details regarding how each measure is rated.

MEASURE	PROFICIENCY RATING	APPLICABLE RUBRIC DESCRIPTION
ELA PROFICIENCY	Rating Not Applicable for 2020-2021	Not Applicable for 2020-2021 School Year

MEASURE	GROWTH RATING	APPLICABLE RUBRIC DESCRIPTION
ELA GROWTH	Rating Not Applicable for 2020-2021	Not Applicable for 2020-2021 School Year

Academic Outcomes

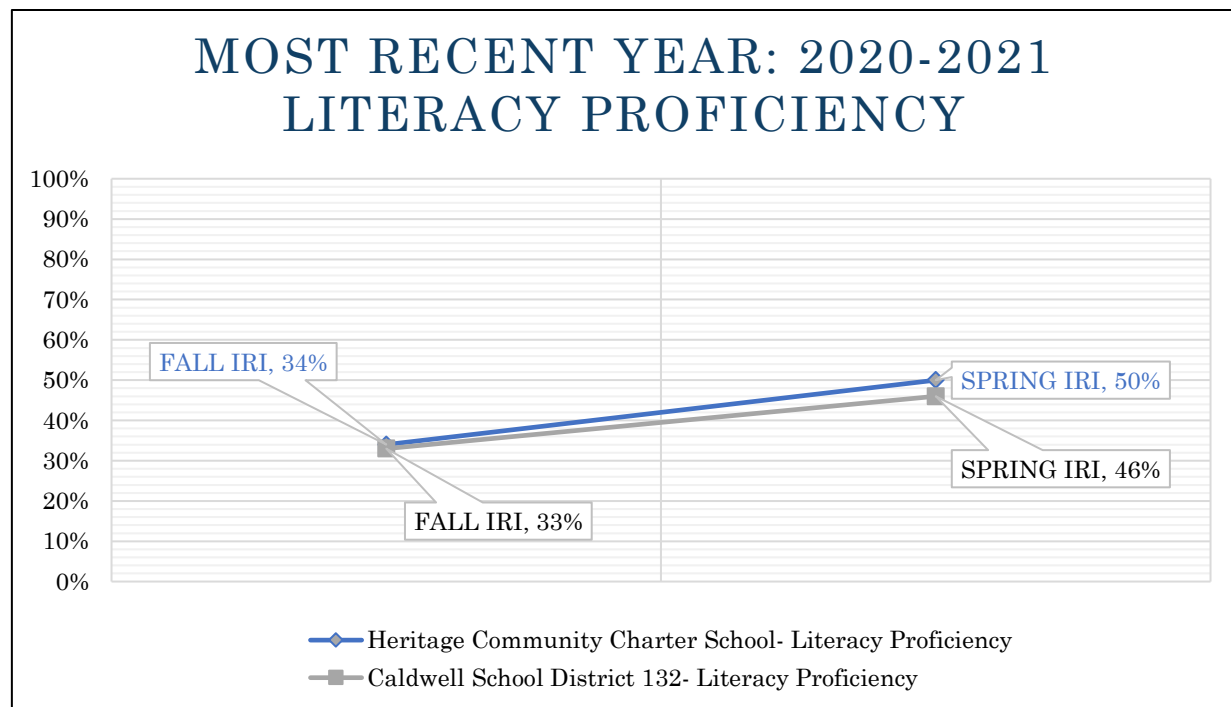
LITERACY PROFICIENCY

Why This Matters:

The IPCSC must determine whether the academic performance at the school represents a favorable return on the investment of public dollars. For context, the IPCSC considers the school's performance in relation to other educational choices available to families. A school that performs as well or better than the average of its comparison group on the spring statewide literacy assessment (IRI) meets the IPCSC standard. Alternatively, a school that did not perform as well or better than its comparison group on the spring assessment, but that did improve its outcome by at least 10% from fall to spring, also meets standard.

If this standard is not yet met, the school should focus its strategic planning on improving these outcomes to ensure the school will earn a next operational term. If the standard is met, strategic planning may focus on whatever data points will best establish and sustain an exemplary school of the specific model for which the school is chartered.

Comparison Group: Caldwell School District (132)



RATING LEGEND	DOES NOT MEET STANDARD	APPROACHES STANDARD	MEETS STANDARD	EXCEEDS STANDARD	NOT RATED DUE TO PANDEMIC
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*Please see the [Performance Framework Rubrics](#) for details regarding how each measure is rated.

MEASURE	PROFICIENCY RATING	APPLICABLE RUBRIC DESCRIPTION
LITERACY PROFICIENCY	Rating Not Applicable for 2020-2021	Not Applicable for 2020-2021 School Year

Longitudinal Academic Ratings | 2018-2023

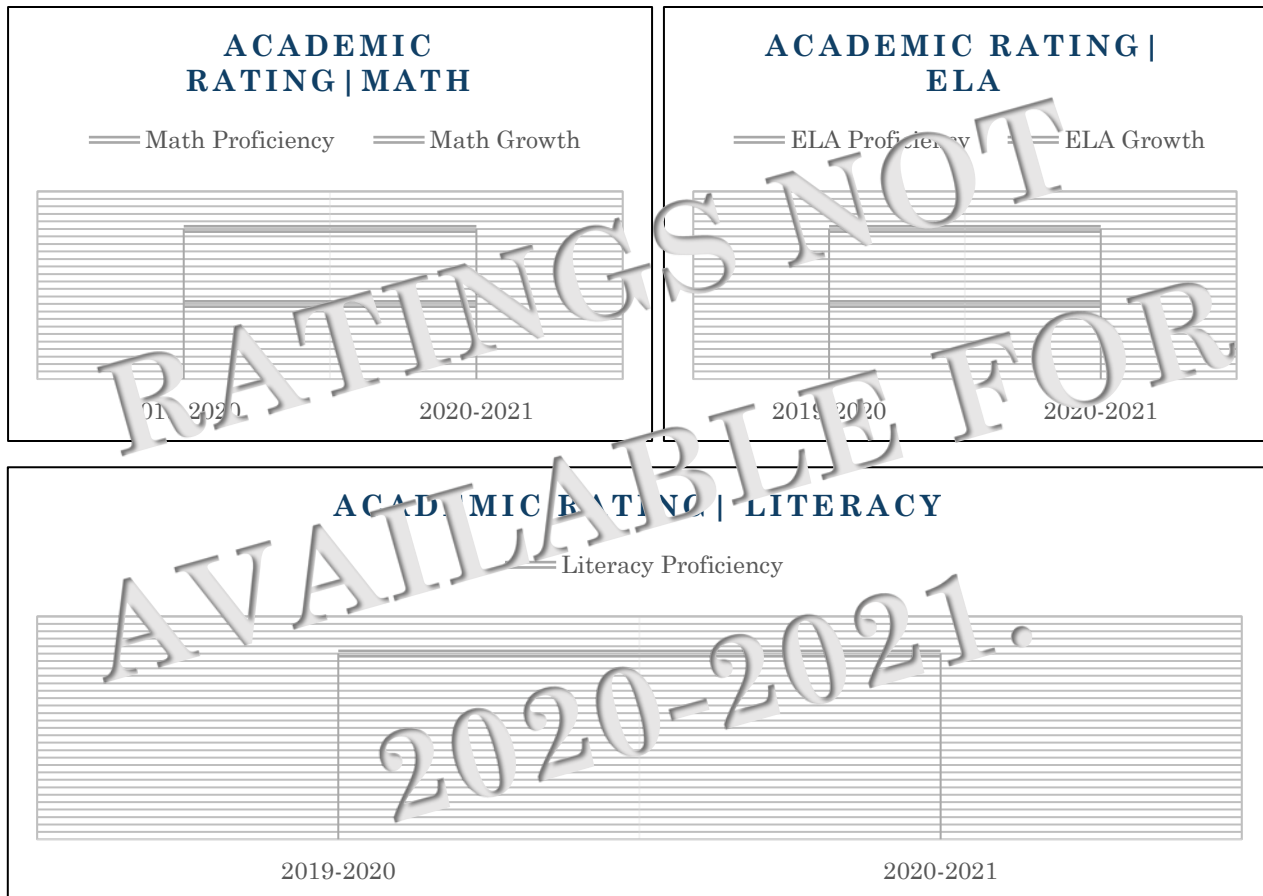
Longitudinal data provides a snapshot of a school's ratings over the school's current performance certificate (5 years). This data helps to identify performance trends and changes over time. Schools are encouraged to consider how this data might be used to drive strategic planning as the school approach its next renewal decision.

Academic Ratings | Historical Framework

SCHOOL YEAR	ACADMEIC GEN ED OUTCOME
2018-2019	REMEDIATION

Academic Ratings | Revised Framework

Due to COVID-19 pandemic, no academic data was available for the 2019-2020 school year. Additionally, as ratings are sued to inform charter renewal decisions, the IPCSC chose to suspend ratings for the 2020-21 school year due to the anticipated impact of the pandemic.



RATING LEGEND	DOES NOT MEET STANDARD	APPROACHES STANDARD	MEETS STANDARD	EXCEEDS STANDARD	NOT RATED DUE TO PANDEMIC
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Operational Outcomes

BOARD STEWARDSHIP

Why This Matters:

At the highest level, the success of a charter school is driven by the ability of its governing board to govern effectively. The measures in this section help identify the strengths and challenges faced by the school's board. As success on these measures was not unduly influenced by the pandemic, ratings are applied for the 2020-2021 school year. *Please see the [Performance Framework Rubrics](#) for details regarding how each measure is rated.

STANDARD RATING: EXCEEDS STANDARD	
Governance Structure Measure	Data/Evidence Source
The board bylaws are compliant with ID law.	Bylaws 2/2/2010. *Please provide an updated copy if any amendments have been made as of 7/1/21.
The school's articles of incorporation are current.	Articles of Incorporation initially filed on 2/2/2010. Most recently updated on 3/18/2011.
The board does operate in compliance with its bylaws.	*No instances of non-compliance documented.
Investigations were not conducted into 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.
Comments/ Context:	

STANDARD RATING: EXCEEDS STANDARD	
Governance Oversight Measure	Data/Evidence Source
The IPCSC did not evaluate the boards review of academic data in a timely and thorough manner due to pandemic for 2020-2021.	*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.
Comments/ Context:	

STANDARD RATING: EXCEEDS STANDARD	
Governance Compliance Measure	Data/Evidence Source
The IPCSC 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.
Comments/ Context:	

Operational Outcomes

MANAGEMENT

Why This Matters:

The systems and structures that support school operations are an important part of the school's overall success. The measures in this section help identify the strengths and challenges that impact the school's day-to-day operations. As success on these measures was not unduly influenced by the pandemic, ratings are applied for the 2020-2021 school year.

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 2020-2021
Comments/ Context:	

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.
Comments/ Context:	

STANDARD RATING: EXCEEDS STANDARD	
Facility and Services	Data/Evidence Source
The school's occupancy certificate is current.	*No instances of non-compliance documented.
Safety inspections and evacuation drills are compliant.	*Most Recent: 7/2/2021 No instances of non-compliance documented.
<i>The IPCSC did not evaluate school transportation for students due to measure being waived for 2020-2021.</i>	*No instances of non-compliance documented.
<i>The IPCSC did not evaluate school nutrition for students due to measure being waived for 2020-2021</i>	*No instances of non-compliance documented.
Comments/ Context:	

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.
Comments/ Context:	

Longitudinal Operational Ratings | 2018-2023

Board Stewardship

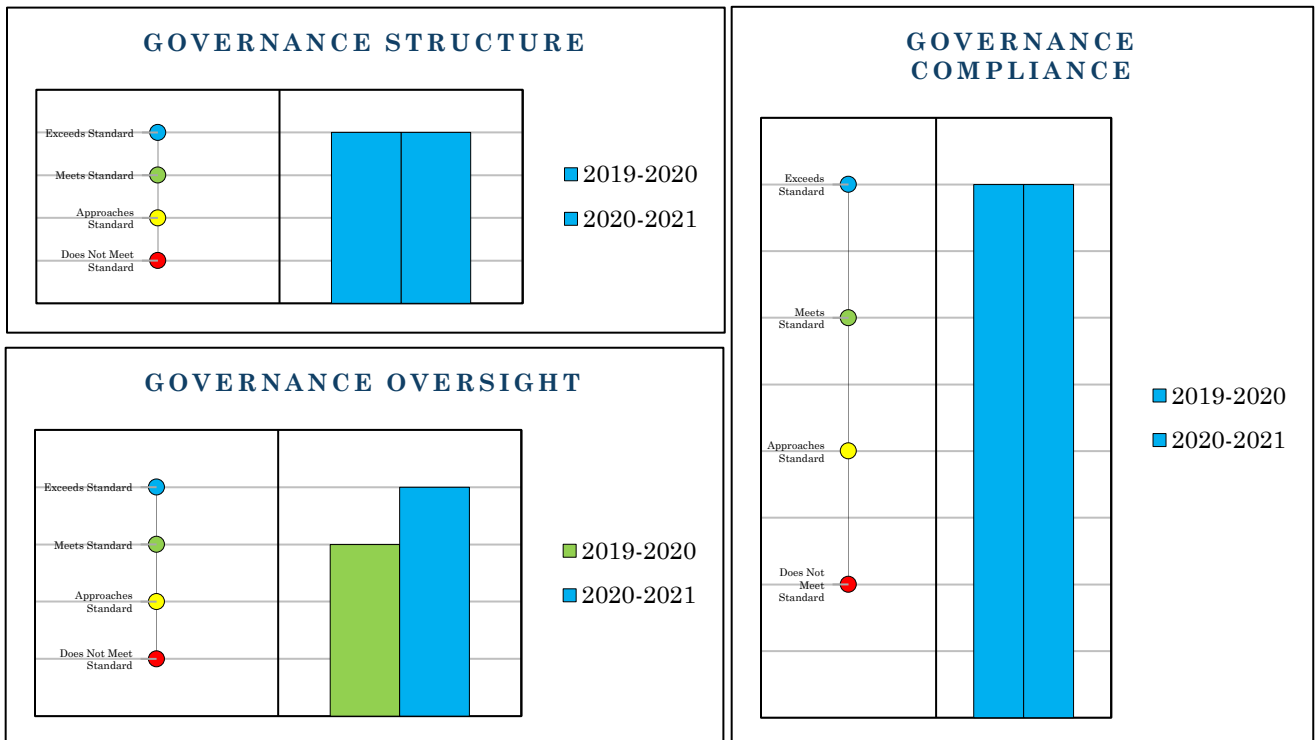
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Ratings on the historical and revised framework are not comparable in the operational section. The two sets of data have been included. The school's operational ratings on the historical framework are provided for reference.

Note: In 2020, the IPCSC reorganized these measures for clarity. Operational outcomes are now divided into two sections (board stewardship and management) based on the primary party responsible for the school's success on each measure.

Operational Ratings: Board Stewardship | Revised Framework

School Year	Rating
2018-2019	HONOR



Longitudinal Operational Ratings | 2018-2023

Management

Longitudinal data provides a snapshot of a school's ratings over the school's current performance certificate (5 years). This data helps to identify performance trends and changes over time. Schools are encouraged to consider how this data might be used to drive your strategic planning as your school approach its next renewal decision.

Ratings on the historical and revised framework are not comparable in the operational section. The two sets of data have been included. The school's operational ratings on the historical framework are provided for reference.

Operational Ratings | Historical Framework

School Year	Rating
2018-2019	HONOR

Note: In 2020, the IPCSC reorganized these measures for clarity. Operational outcomes are now divided into two sections (board stewardship and management) based on the primary party responsible for the school's success on each measure.

Operational Ratings: Management | Revised Framework



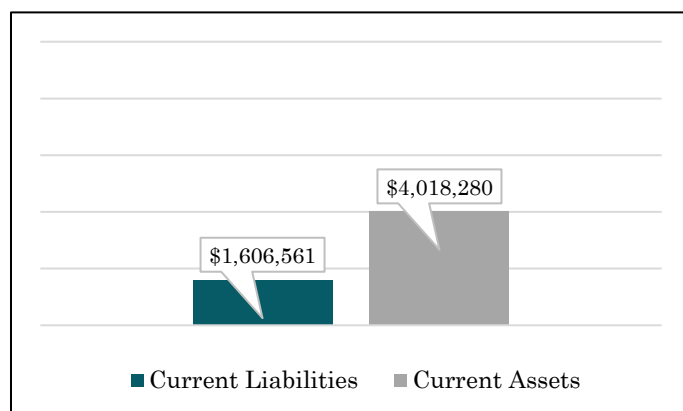
Financial Outcomes

NEAR TERM MEASURES

These measures evaluate whether a school is likely to meet its financial obligations in the next year.
 *Please see the [Performance Framework Rubrics](#) for details regarding how each measure is rated.

Current Ratio

The school has a current ratio of more than 1.5.	Current Ratio 2.50	Ratings Not Applicable for 2020-2021
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Why This Matters:

Current Ratio is a comparison of a school's financial obligations due within one year (current liabilities) to the cash and investments held by the school (current assets).

A school with more assets than liabilities (a Current Ratio greater than 1.0) would be able to meet its financial obligations for the

next year without relying on future revenue.

A school with more liabilities than assets (a Current Ratio of less than 1.0) is dependent on revenue it has not yet received to meet existing financial obligations.

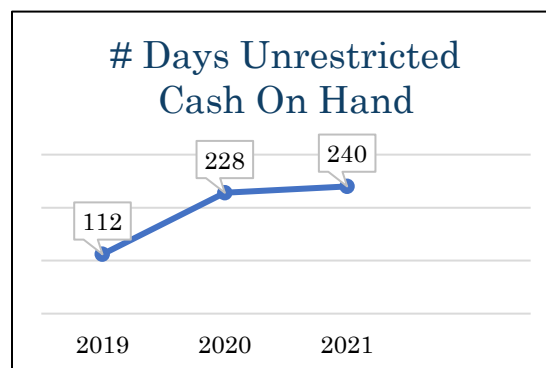
Unrestricted Days Cash

The school has more than 60 days cash on hand	240 Days	Ratings Not Applicable for 2020-2021
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Why this Matters:

This measure estimates a school's average daily cost of operations and considers the number of days a school could operate using only its available cash and investments.

A school with at least 60 days cash on hand would be able to meet its immediate financial obligations with available cash, buying the time it might take to access other current assets. Occasionally, a planned purchase may decrease this number temporarily. In those cases, 30-60 days cash on hand with an upward trend is acceptable. A school with less than 15 days cash on hand is in financial distress and is at risk of automatic closure.



Default

The school is not in default of any financial obligations and did not experience any instances of default during the fiscal year.	Ratings Not Applicable for 2020-2021
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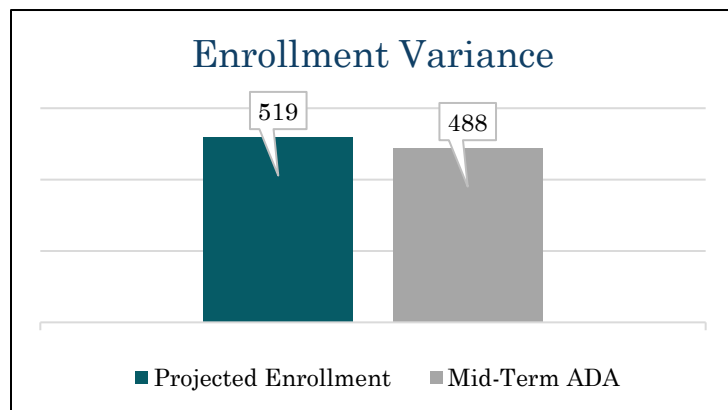
Why this Matters:

This measure identifies whether a school has defaulted on any of its financial obligations. Default can mean many things. Examples of default include: paying bills late, failing to make payroll, or inaccurately filing reports required for funding. Default can also include a failure to meet any additional requirements of long-term debt as established by the lender (such as meeting a specific enrollment target or maintaining a greater amount of cash on hand than the PCSC requires).

Any act of default can result in disruption of services, loans being called due, or funding that is inaccurate or withheld.

Enrollment Variance

The school achieved and sustained between 90% and 94.9% of its projected enrollment during the most recently completed school year.	Enrollment Variance 94.03%	Ratings Not Applicable for 2020-2021
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Why this Matters:

The Enrollment Variance measure considers what percentage of a school's projected enrollment was achieved. As the majority of a public school's funding is generated by student enrollment, this measure reflects a school's ability to execute its budget to plan.

A school that achieves at least 95% of its projected enrollment will likely experience few bumps and may make minor adjustments. A school that achieves less than 95% of projected enrollment is likely to face budget challenges requiring more significant budget amendments and may be in financial distress.

Financial Outcomes

SUSTAINABILITY MEASURES

These measures help determine whether a school is likely to remain financially stable into the future.

Total Margin

The school's aggregated 3-year total margin is positive, and the most recent year's total margin is positive.	CY Total Margin 4.73% 3-Year Aggregated 10.93%	Ratings Not Applicable for 2020-2021
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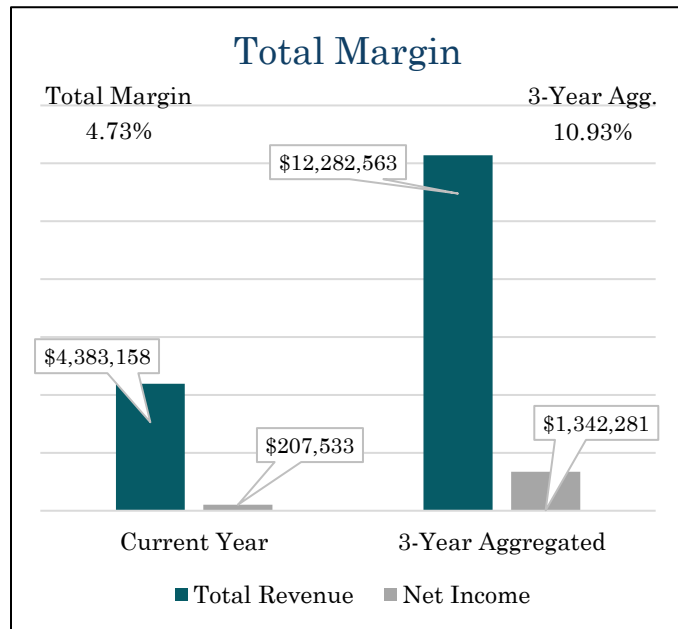
Why this Matters:

The Total Margin compares a school's total revenue to its net income. Specifically, this measure identifies what percentage of a school's total revenue in a given year was not expended during that year. A school with a positive total margin spent less than it brought in. That is, the school is living within its means and can plan for future purchases and investments.

An occasional negative total margin may indicate that a planned or necessary purchase has taken place. This is not necessarily a negative indicator.

However, if the Total Margin is chronically negative or severe decreases appear, the school may be in financial distress. Aggregating this margin over three years helps to identify these long-term trends.

Note: for the purposes of this calculation, pension liability is excluded from the school's net income.



Cash Flow

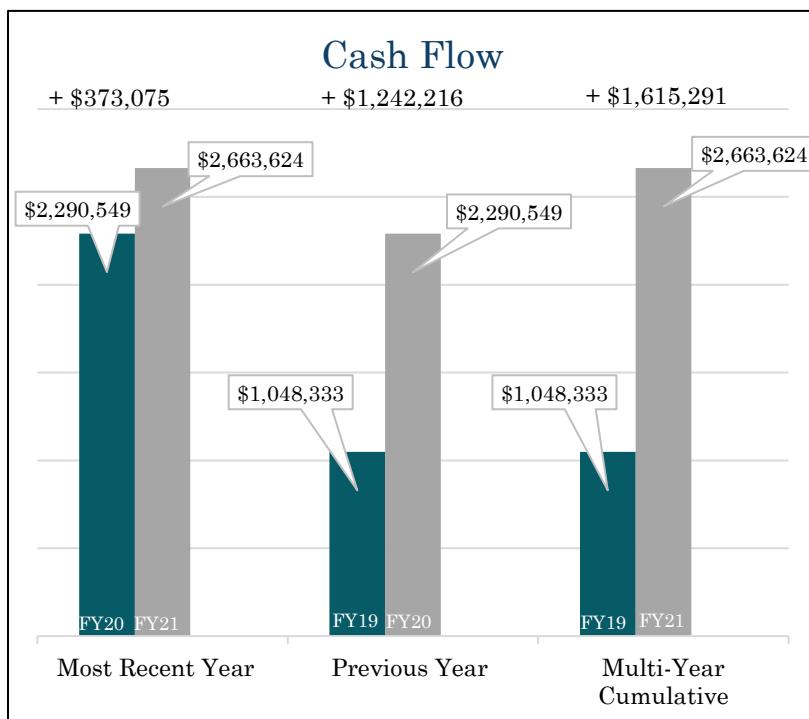
The school's multi-year cumulative cash flow is positive and the most recent year's cash flow is positive.	Most Recent Year \$373,075 Previous Year \$1,242,216 Multi-Year \$1,615,291	Ratings Not Applicable for 2020-2021
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Why this Matters:

The Cash Flow measure considers the change in a school's cash balance over time. A school with a positive cash flow is increasing its reserves and is likely able to fund future projects and purchases.

A school with a negative cash flow is using its existing reserves to fund general operations and is not likely to have the financial flexibility to fund future plans.

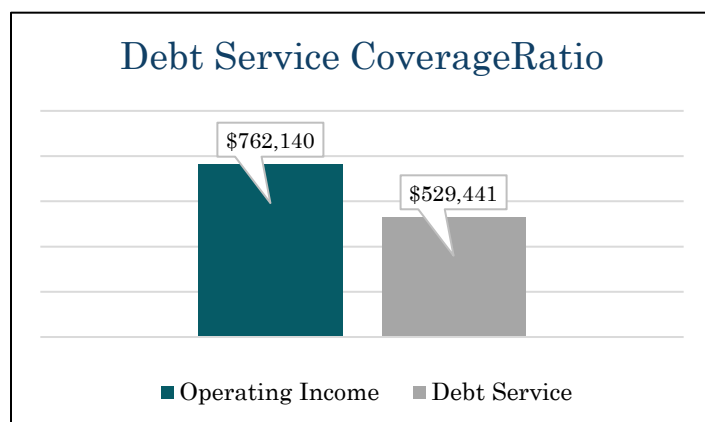
A multi-year cumulative cash flow helps to identify long-term trends.



Debt Service Coverage Ratio

Debt Service Coverage Ratio is between 1.1 and 1.49.	Debt Service Coverage Ratio 1.44	Ratings Not Applicable for 2020-2021
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Why this Matters:



This measure evaluates a school's ability to make payments on debt due in a given year using only that year's income. This helps determine whether a school has more debt than it can manage.

A school with more Operating Income than Debt Service (a Debt Service Coverage Ratio greater than 1) can meet the financial obligations of their debt. A school with more Debt Service than

Operating Income (a ratio of less than 1) is reliant on either reserves or revenues anticipated in future years to meet its debt obligations.

Debt to Asset Ratio

The school's Debt to Asset Ratio is less than 0.9.	Debt/Asset Ratio .86	Ratings Not Applicable for 2020-2021
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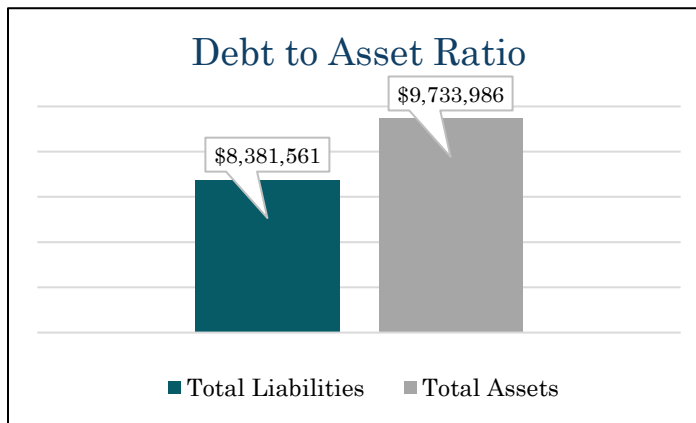
Why This Matters:

The Debt to Asset Ratio compares a school's total liabilities to its total assets. This helps determine whether a school would be able to meet both its short and long-term financial obligations.

A school whose total liabilities are 90% or less of its Total Assets is

likely to be able to repay all short-term debts and still manage to set its long-term affairs in order in a worst-case scenario. A school with more liabilities than assets would not be able to meet all its financial obligations in a worst-case scenario.

Note: for the purposes of this measure, pension liability is excluded from the school's total liabilities.



Financial Compliance

STANDARD RATING: NOT RATED FOR 2020-2021	
Financial Operations	Data and/or Evidence Source
The school's finances are managed in compliance with GAAP.	Financial Audit 10/18/2021
Expenditures and contracts are posted online appropriately.	School's Expenditure Page 7/30/2021
The school maintains compliant internal controls.	*No instances of non-compliance documented.
The school is not operating under a Notification of Fiscal Concern.	*No instances of non-compliance documented.
The school is not operating under a Notification of Possible or Imminent Closure.	*No instances of non-compliance documented.
Comments/Context	

Longitudinal Financial Ratings | 2018-2023

Longitudinal data provides a snapshot of a school's ratings over the school's current performance certificate (5 years). This data helps to identify performance trends and changes over time. Schools are encouraged to consider how this data might be used to drive your strategic planning as your school approach its next renewal decision.

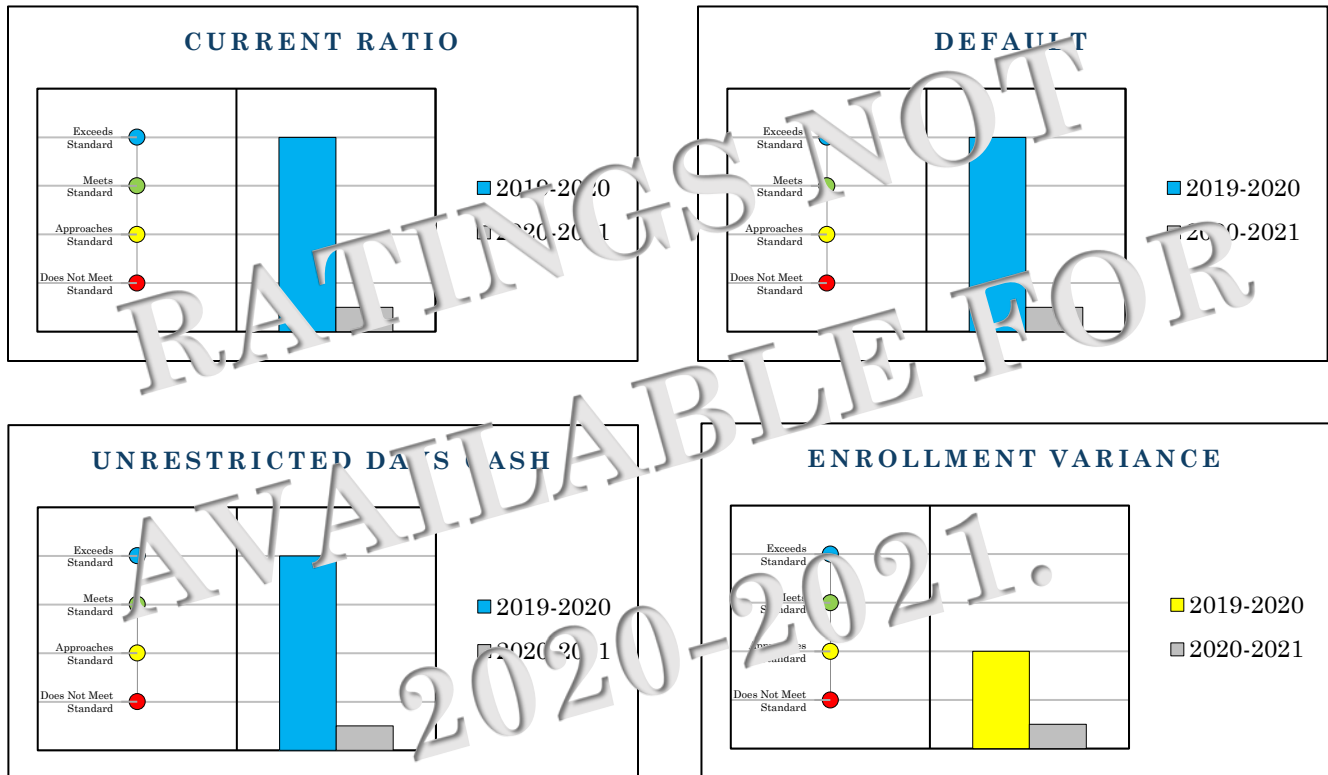
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Financial Near Term Health Ratings | Historical Framework

School Year	Near Term Health Rating
2018-2019	HONOR

Financial Near Term Health Ratings | Revised Framework



Longitudinal Financial Ratings | 2018-2023

Longitudinal data provides a snapshot of a school's ratings over the school's current performance certificate (5 years). This data helps to identify performance trends and changes over time. Schools are encouraged to consider how this data might be used to drive your strategic planning as your school approach its next renewal decision.

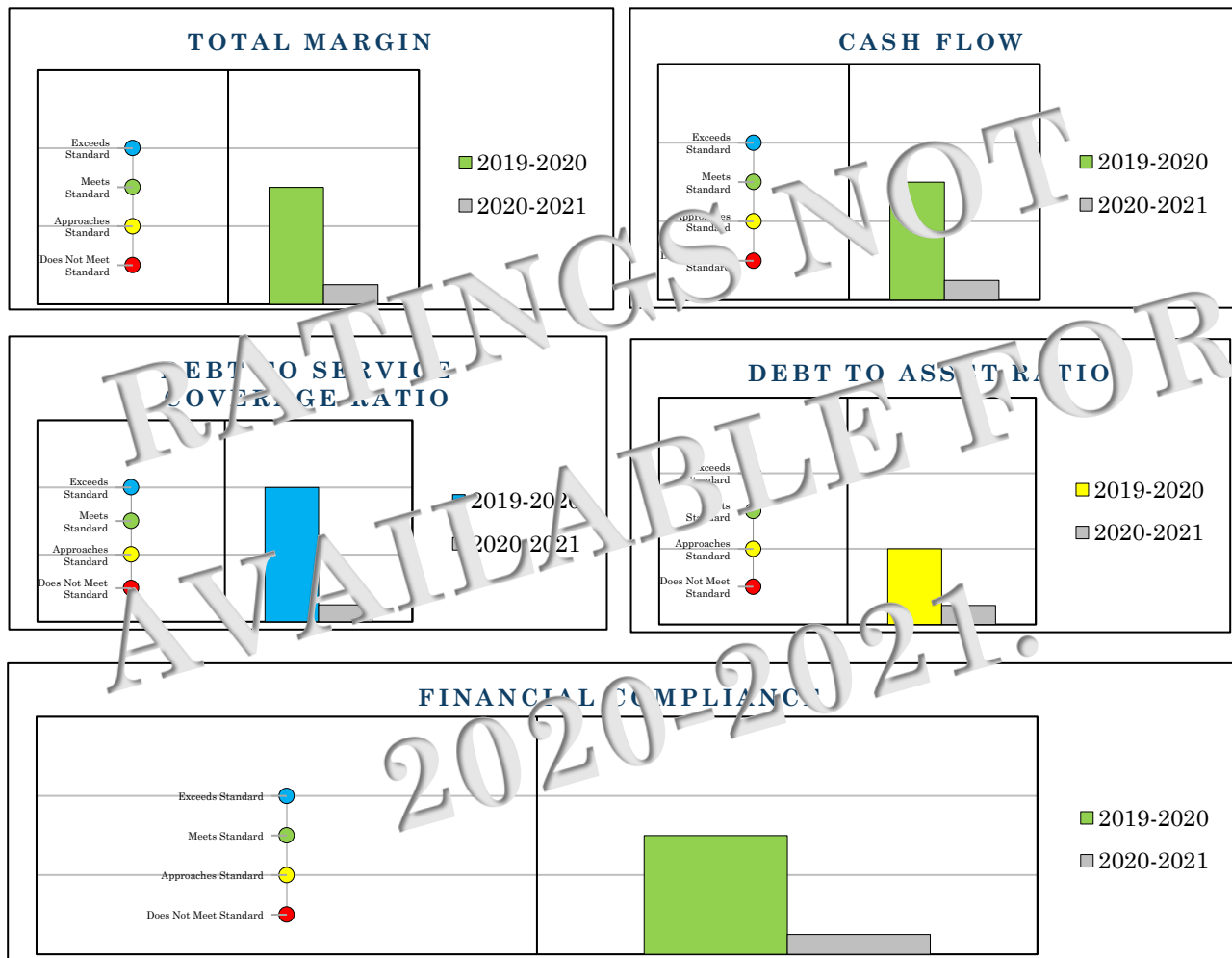
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Due to the impact of the pandemic, financial outcomes are not rated for 2020-21. Additionally, the enrollment variance measure was calculated based on projected enrollment and actual enrollment (not ADA).

Financial Sustainability Ratings | Historical Framework

School Year	Sustainability Rating
2018-2019	HONOR

Financial Sustainability Ratings | Revised Framework



Conditional Certificate Status Update

Heritage Community Charter School's Performance Certificate was renewed in 2018 subject to the conditions listed below.

Condition 1: Condition Waived

By June 30, 2021, at least fifty-seven percent (57%) of HCCS's students in grades K-8 will make adequate academic growth to achieve math proficiency on the ISAT within 3 years or by 10th grade, whichever comes first.

This condition is based upon a rate of increase sufficient to promote the school's ability to achieve a "meets standard" rating on Academic Measure 3a (Criterion-Referenced Growth in Math) in the performance framework adopted by the PCSC in May 2017, by the end of the next performance certificate term (June 30, 2023).

The outcome shall be calculated using Academic Measure 3a (Criterion-Referenced Growth in Math). References to the ISAT shall apply to any other statewide assessment selected to replace the ISAT by SBAC in the event of state-level requirement changes.

Status: This condition was waived due to the likely impact of pandemic conditions on assessment data. Revocation will not be considered based on the school's failure to meet this condition at this time.

Condition 2: Condition Waived

By June 30, 2021, at least sixty-three percent (63%) of HCCS's students in grades K-8 will make adequate academic growth to achieve ELA proficiency on the ISAT within 3 years or by 10th grade, whichever comes first.

This condition is based upon a rate of increase sufficient to promote the school's ability to achieve a "meets standard" rating on Academic Measure 3b (Criterion-Referenced Growth in ELA) in the performance framework adopted by the PCSC in May 2017, by the end of the next performance certificate term (June 30, 2023).

Status: This condition was waived due to the likely impact of pandemic conditions on assessment data. Revocation will not be considered based on the school's failure to meet this condition at this time.

*The 2020-2021 Annual Report has been finalized by the
Idaho Public Charter School Commission staff.*

If you have any questions or comments, please contact
the IPCSC.



304 N. 8th St. Ste.242

Boise, ID 83720

208-332-1561

pcsc@osbe.idaho.gov



Annual Performance Report 2021

Idaho Science and Technology Charter School

Mission Statement: The mission of Idaho Science and Technology Charter School (ISTCS) is to engage students in independent learning through authentic, complex, projects in a positive collaborative setting.

Chair/President	Becki Adams
Treasurer/Secretary	Casey Polatis
Administrator	Tami Dortch
Business Manager	Celeste Whitney
School Location	21 N 550 W Blackfoot
School Phone	208-785-7827

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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 includes a framework describing the expectations the school must meet in order to earn a next operational term. It also requires that charter school authorizer's complete performance reports for the schools they oversee each year. The annual performance report serves the following purposes:

1. To provide transparent information about charter school quality to the public;
2. To ensure charter school boards have access to clear expectations and;
3. To inform mid-term authorizing decisions.

This report 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.

Each measure included in the IPCSC'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, the IPCSC has suspended ratings (exceeds, meets, etc.) on academic and financial measures for the FY21 report. All outcomes are included in this report; however, outcomes are not rated.

Idaho Science and Technology Charter School Performance Certificate: [ISTCS Performance Certificate](#)

Performance Framework: [IPCSC Performance Framework](#)

Current Term: 2018-2023

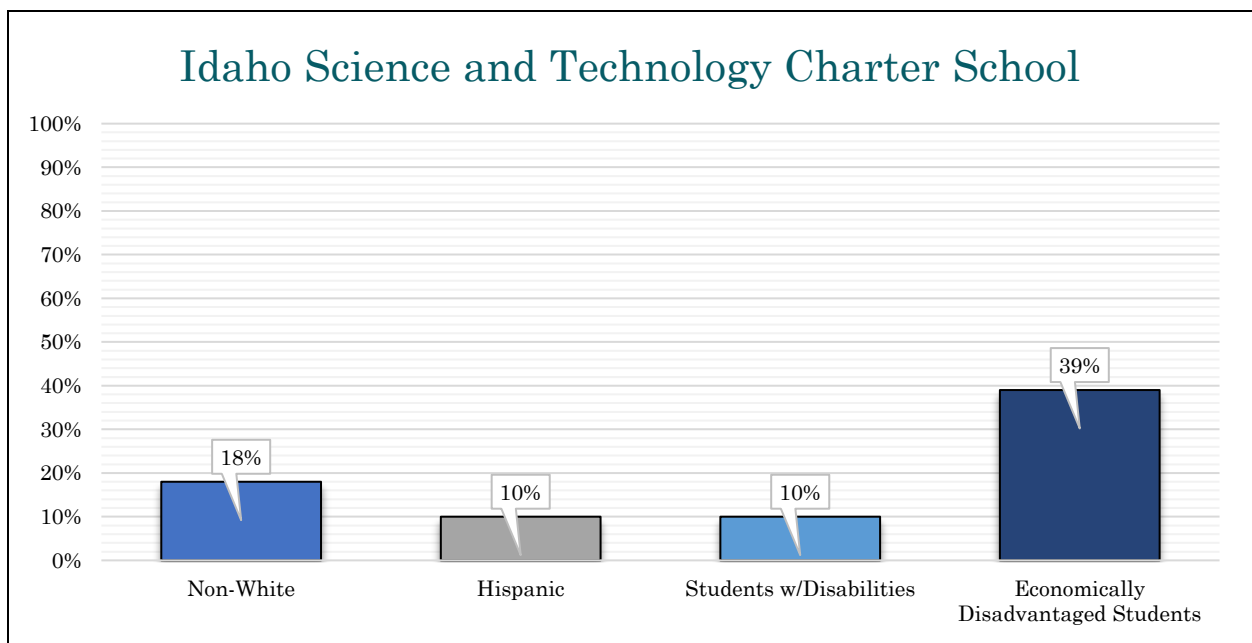
School Overview

Model:	Project-based learning, STEAM
Enrollment Capacity:	460
Grades Served:	K-8
Enrollment Projected FY22:	333

Key Design Elements:

- The educational program at ISTCS is centered on a project-based learning philosophy aligned with Idaho State Standards. Students learn best when they are personally invested in their own learning. Project-based learning encourages active student engagement as students “learn how to apply knowledge [gained in core ELA and math courses] to the real world, and use it to solve problems, answer complex questions, and create high-quality products.” (Buck Institute for Education, 2015). While project-based classes may be taught in a variety of subjects, many project-based classes will focus on teaching the application of skills necessary to succeed in science such as problem solving, inquiry, collaboration, constructing and testing a hypothesis, and effectively communicating results.
- ISTCS will promote a supportive and collaborative school culture. ISTCS will actively encourage collaboration amongst faculty and students. This emphasis will inform school decisions in scheduling, professional development, curriculum, and discipline. ISTCS will maintain a 4-day instructional week; Fridays will be focused teachers’ professional development and collaboration. ISTCS will implement classroom strategies and activities designed to explicitly teach students how to contribute in a collaborative, supportive academic effort.

2021 IDAHO SCIENCE AND TECHNOLOGY CHARTER SCHOOL DEMOGRAPHIC



RATING LEGEND	DOES NOT MEET STANDARD	APPROACHES STANDARD	MEETS STANDARD	EXCEEDS STANDARD	NOT RATED DUE TO PANDEMIC
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2020-2021 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.

ACADEMIC OUTCOMES:	
Math Proficiency	28%
Math Growth	<i>Data Not Available for 2020-2021</i>
ELA Proficiency	42%
ELA Growth	<i>Data Not Available for 2020-2021</i>
Literacy Proficiency	FALL IRI: 48% SPRING IRI: 50%

FINANCIAL OUTCOMES: NEAR TERM MEASURES	
Current Ratio	1.18
Unrestricted Days Cash	87
Default	None
Enrollment Variance	100.32%

OPERATIONAL OUTCOMES: BOARD STEWARDSHIP	
Governance Structure	EXCEEDS STANDARD
Governance Oversight	EXCEEDS STANDARD
Governance Compliance	EXCEEDS STANDARD

FINANCIAL OUTCOMES: SUSTAINABILITY MEASURES	
Total Margin	TM: 3.17%
3 Yr. Aggregate Margin	3YR: 18.57%
Cash Flow	CF: \$123,717
Multi-Year Cash Flow	MY: \$491,701
Debt Service Coverage Ratio	1.17
Debt Asset Ratio	.12
Financial Compliance	Not Rated for 2020-2021

OPERATIONAL OUTCOMES: MANAGEMENT	
Student Services	EXCEEDS STANDARD
Data Security/Transparency	APPROACHES STANDARD
Facility & Services	EXCEEDS STANDARD
Operational Compliance	EXCEEDS STANDARD

Note: Due to the impact of the pandemic, Academic outcomes were not available for the 2019-2020 school year. Academic outcomes are available but will not be rated for the 2020-2021 school year.

Academic Outcomes

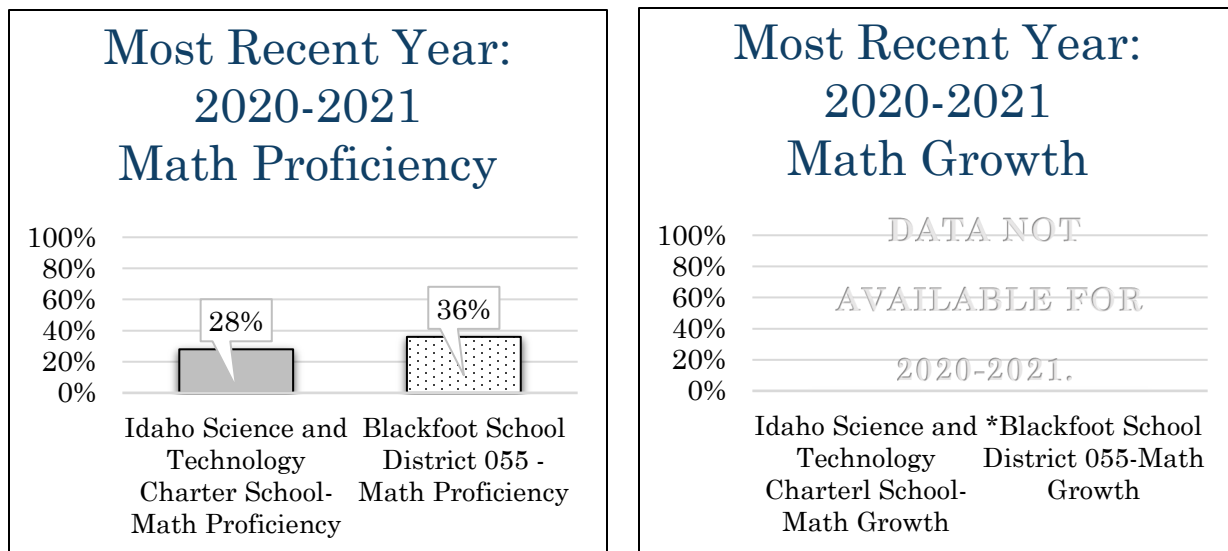
MATH PROFICIENCY & MATH GROWTH

Why This Matters:

The IPCSC must determine whether the academic performance at the school represents a favorable return on the investment of public dollars. For context, the IPCSC considers the school's performance in relation to other educational choices available to families. A school that performs as well or better than the average of its comparison group on the statewide mathematics assessment (ISAT) meets the IPCSC standard on both the math proficiency and math growth measures.

If this standard is not yet met, the school should focus its strategic planning on improving mathematics achievement outcomes to ensure the school will earn a next operational term. If the standard is met, strategic planning may focus on whatever data points will best establish and sustain an exemplary school of the specific model for which the school is chartered.

Comparison Group: Blackfoot District (055)



RATING LEGEND	DOES NOT MEET STANDARD	APPROACHES STANDARD	MEETS STANDARD	EXCEEDS STANDARD	NOT RATED DUE TO PANDEMIC
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*Please see the [Performance Framework Rubrics](#) for details regarding how each measure is rated.

MEASURE	PROFICIENCY RATING	APPLICABLE RUBRIC DESCRIPTION
MATH PROFICIENCY	Rating Not Applicable for 2020-2021	Not Applicable for 2020-2021 School Year

MEASURE	GROWTH RATING	APPLICABLE RUBRIC DESCRIPTION
MATH GROWTH	Rating Not Applicable for 2020-2021	Not Applicable for 2020-2021 School Year

Academic Outcomes

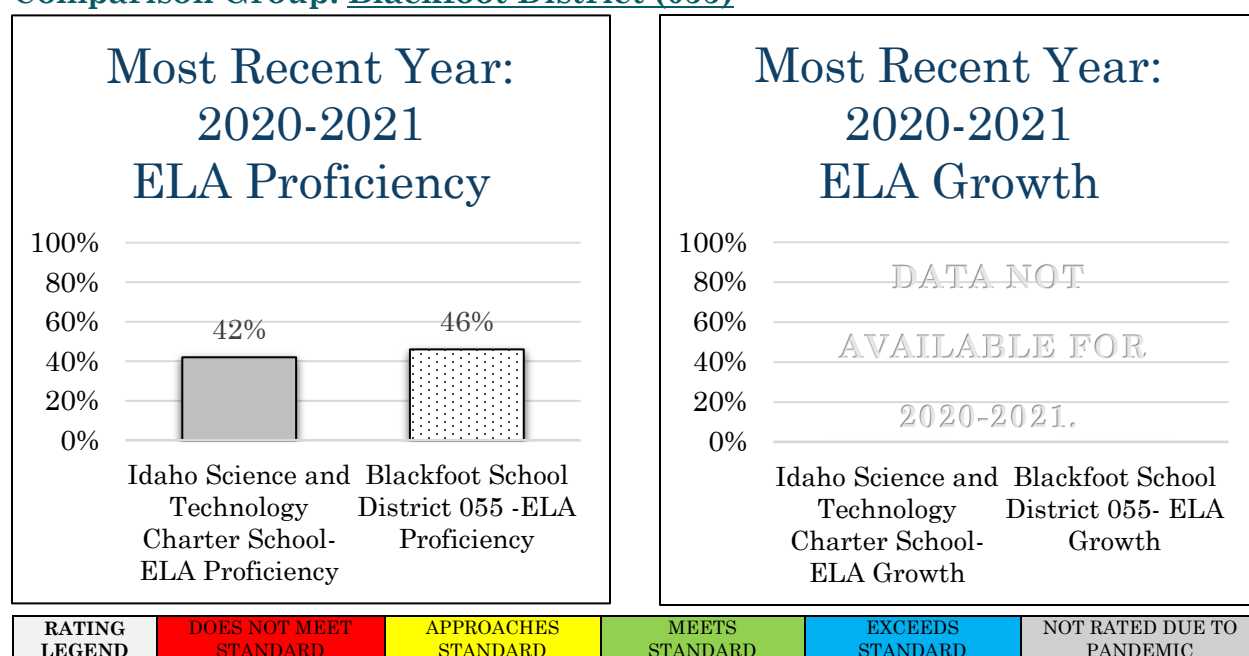
ELA PROFICIENCY & ELA GROWTH

Why This Matters:

The IPCSC must determine whether the academic performance at the school represents a favorable return on the investment of public dollars. For context, the IPCSC considers the school's performance in relation to other educational choices available to families. A school that performs as well or better than the average of its comparison group on the statewide ELA assessment (ISAT) meets the IPCSC standard on both the ELA proficiency and ELA growth measures.

If this standard is not yet met, the school should focus its strategic planning on improving these outcomes to ensure the school will earn a next operational term. If the standard is met, strategic planning may focus on whatever data points will best establish and sustain an exemplary school of the specific model for which the school is chartered.

Comparison Group: Blackfoot District (055)



*Please see the [Performance Framework Rubrics](#) for details regarding how each measure is rated.

MEASURE	PROFICIENCY RATING	APPLICABLE RUBRIC DESCRIPTION
ELA PROFICIENCY	Rating Not Applicable for 2020-2021	Not Applicable for 2020-2021 School Year

MEASURE	GROWTH RATING	APPLICABLE RUBRIC DESCRIPTION
ELA GROWTH	Rating Not Applicable for 2020-2021	Not Applicable for 2020-2021 School Year

Academic Outcomes

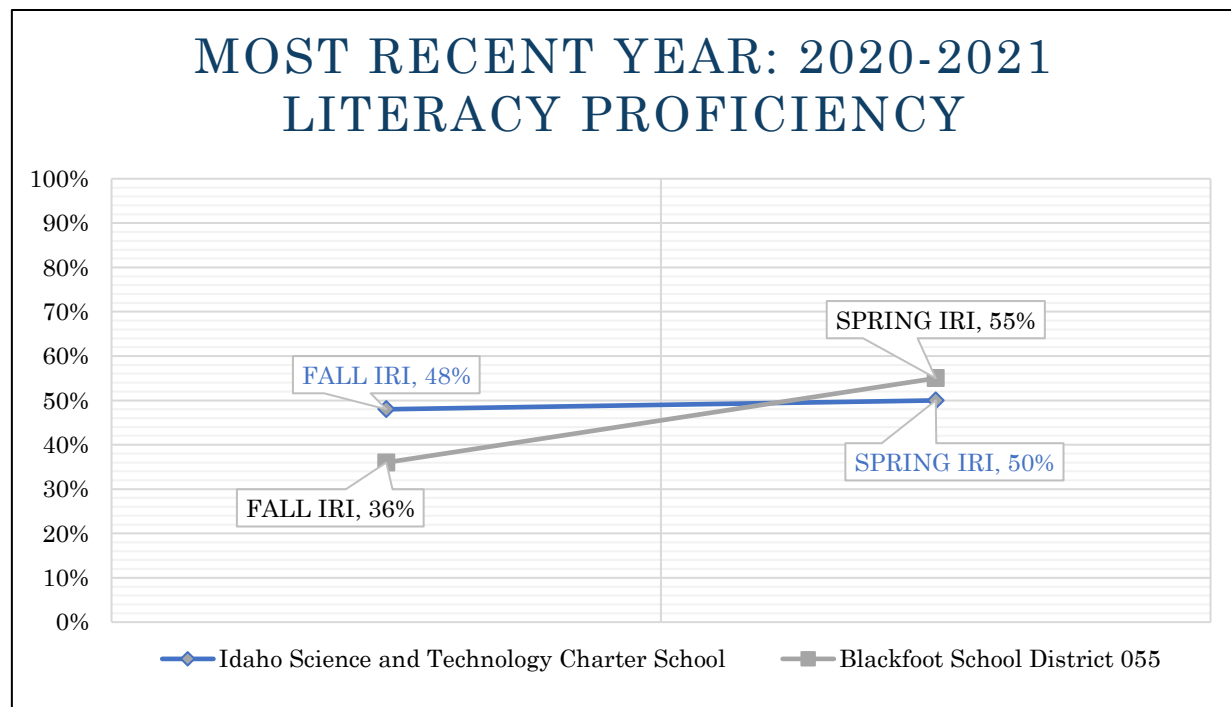
LITERACY PROFICIENCY

Why This Matters:

The IPCSC must determine whether the academic performance at the school represents a favorable return on the investment of public dollars. For context, the IPCSC considers the school's performance in relation to other educational choices available to families. A school that performs as well or better than the average of its comparison group on the spring statewide literacy assessment (IRI) meets the IPCSC standard. Alternatively, a school that did not perform as well or better than its comparison group on the spring assessment, but that did improve its outcome by at least 10% from fall to spring, also meets standard.

If this standard is not yet met, the school should focus its strategic planning on improving these outcomes to ensure the school will earn a next operational term. If the standard is met, strategic planning may focus on whatever data points will best establish and sustain an exemplary school of the specific model for which the school is chartered.

Comparison Group: Blackfoot District (055)



RATING LEGEND	DOES NOT MEET STANDARD	APPROACHES STANDARD	MEETS STANDARD	EXCEEDS STANDARD	NOT RATED DUE TO PANDEMIC
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*Please see the [Performance Framework Rubrics](#) for details regarding how each measure is rated.

MEASURE	PROFICIENCY RATING	APPLICABLE RUBRIC DESCRIPTION
LITERACY PROFICIENCY	Rating Not Applicable for 2020-2021	Not Applicable for 2020-2021 School Year

Longitudinal Academic Ratings | 2018-2023

Longitudinal data provides a snapshot of a school's ratings over the school's current performance certificate (5 years). This data helps to identify performance trends and changes over time. Schools are encouraged to consider how this data might be used to drive strategic planning as the school approach its next renewal decision.

Academic Ratings | Historical Framework

SCHOOL YEAR	ACADEMIC GEN ED OUTCOME
2018-2019	CRITICAL
2019-2020	NOT RATE DUE TO PANDEMIC

Academic Ratings | Revised Framework

Due to COVID-19 pandemic, no academic data was available for the 2019-2020 school year. Additionally, as ratings are used to inform charter renewal decisions, the IPCSC chose to suspend ratings for the 2020-21 school year due to the anticipated impact of the pandemic.



RATING LEGEND	DOES NOT MEET STANDARD	APPROACHES STANDARD	MEETS STANDARD	EXCEEDS STANDARD	NOT RATED DUE TO PANDEMIC
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Operational Outcomes

BOARD STEWARDSHIP

Why This Matters:

At the highest level, the success of a charter school is driven by the ability of its governing board to govern effectively. The measures in this section help identify the strengths and challenges faced by the school's board. As success on these measures was not unduly influenced by the pandemic, ratings are applied for the 2020-2021 school year. *Please see the [Performance Framework Rubrics](#) for details regarding how each measure is rated.

STANDARD RATING: EXCEEDS STANDARD	
Governance Structure Measure	Data/Evidence Source
The board bylaws are compliant with ID law.	Bylaws 7/20/2021. *Please provide an updated copy if any amendments have been made as of 7/1/21.
The school's articles of incorporation are current.	Articles of Incorporation initially filed on 3/20/2008.
The board does operate in compliance with its bylaws.	*No instances of non-compliance documented.
Investigations were not conducted into 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.
Comments/ Context:	

STANDARD RATING: EXCEEDS STANDARD	
Governance Oversight Measure	Data/Evidence Source
The IPCSC did not evaluate the boards review of academic data in a timely and thorough manner due to pandemic for 2020-2021.	*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.
Comments/ Context:	

STANDARD RATING: EXCEEDS STANDARD	
Governance Compliance Measure	Data/Evidence Source
The IPCSC 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.
Comments/ Context:	

Operational Outcomes

MANAGEMENT

Why This Matters:

The systems and structures that support school operations are an important part of the school's overall success. The measures in this section help identify the strengths and challenges that impact the school's day-to-day operations. As success on these measures was not unduly influenced by the pandemic, ratings are applied for the 2020-2021 school year.

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 2020-2021
Comments/ Context:	

STANDARD RATING: APPROACHES STANDARD	
Data Security and Information Transparency	Data/Evidence Source
The school's website is not 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.
Comments/ Context: Contracts that support expenditures are not posted on website (I.C. 33-357); IPCSC Annual Report for prior fiscal year not posted prior to January 31 st (I.C. 33-5209C(2)).	

STANDARD RATING: EXCEEDS STANDARD	
Facility and Services	Data/Evidence Source
The school's occupancy certificate is current.	*No instances of non-compliance documented.
Safety inspections and evacuation drills are compliant.	*Most Recent: 2/4/2021 No instances of non-compliance documented.
<i>The IPCSC did not evaluate school transportation for students due to measure being waived for 2020-2021.</i>	*No instances of non-compliance documented.
<i>The IPCSC did not evaluate school nutrition for students due to measure being waived for 2020-2021</i>	*No instances of non-compliance documented.
Comments/ Context:	

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.
Comments/ Context:	

Longitudinal Operational Ratings | 2018-2023

Board Stewardship

Longitudinal data provides a snapshot of a school's ratings over the school's current performance certificate (5 years). This data helps to identify performance trends and changes over time. Schools are encouraged to consider how this data might be used to drive your strategic planning as your school approach its next renewal decision.

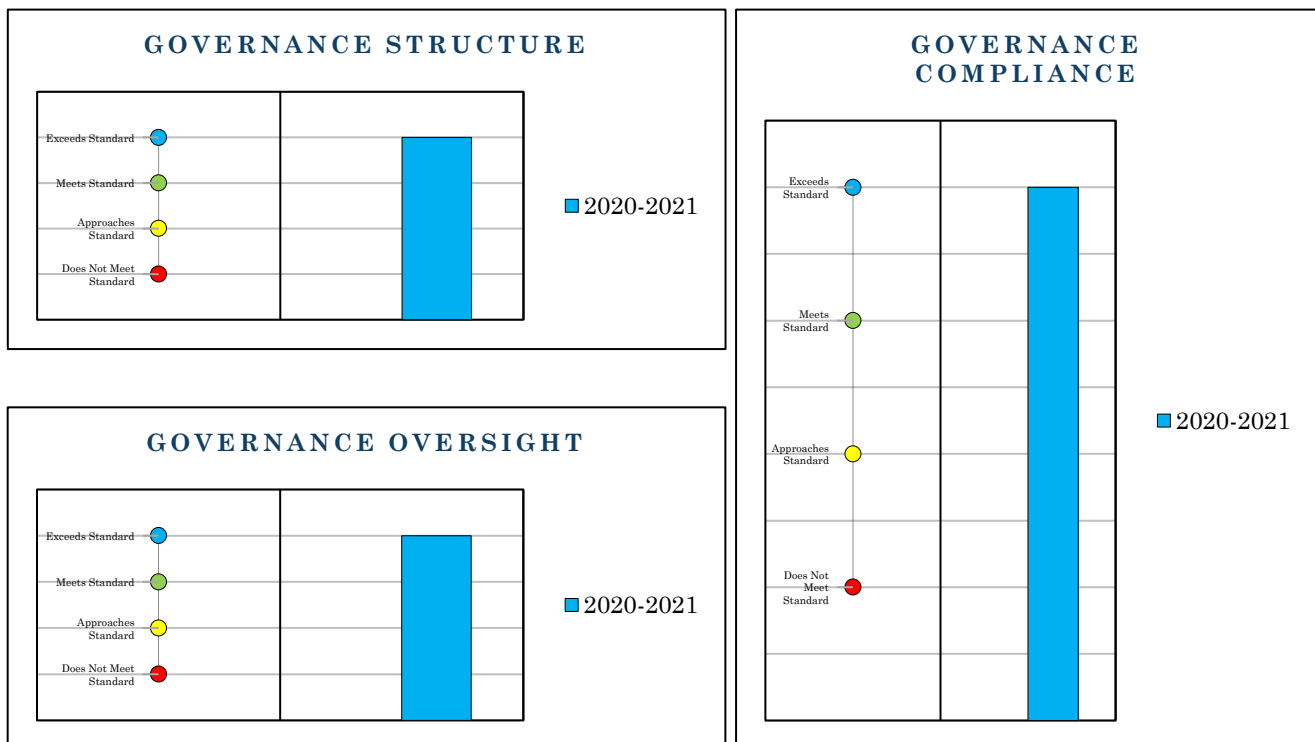
Ratings on the historical and revised framework are not comparable in the operational section. The two sets of data have been included. The school's operational ratings on the historical framework are provided for reference.

Operational Ratings | Historical Framework

School Year	Rating
2018-2019	HONOR
2019-2020	HONOR

Note: In 2020, the IPCSC reorganized these measures for clarity. Operational outcomes are now divided into two sections (board stewardship and management) based on the primary party responsible for the school's success on each measure.

Operational Ratings: Board Stewardship | Revised Framework



Longitudinal Operational Ratings | 2018-2023

Management

Longitudinal data provides a snapshot of a school's ratings over the school's current performance certificate (5 years). This data helps to identify performance trends and changes over time. Schools are encouraged to consider how this data might be used to drive your strategic planning as your school approach its next renewal decision.

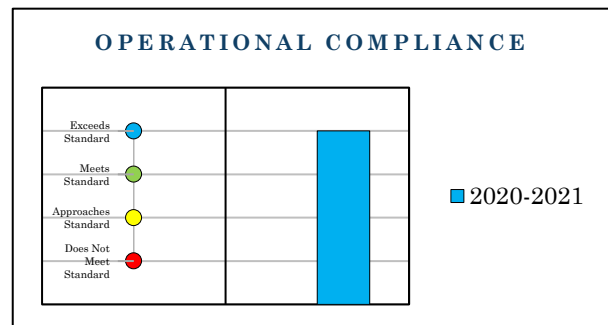
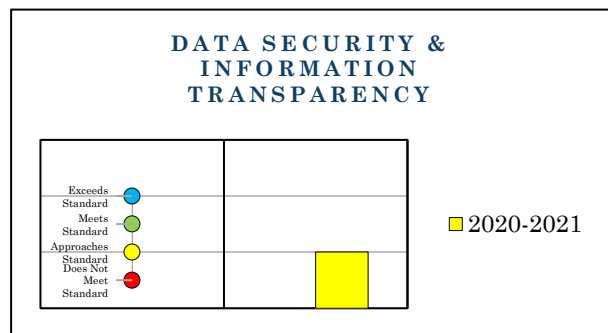
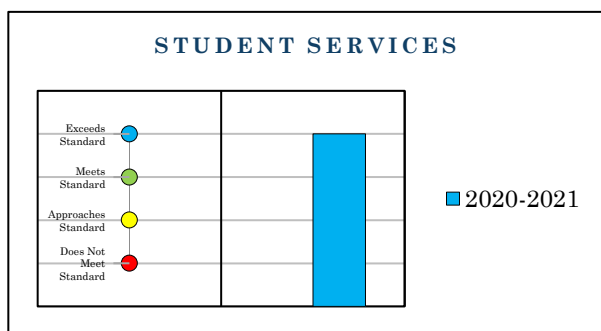
Ratings on the historical and revised framework are not comparable in the operational section. The two sets of data have been included. The school's operational ratings on the historical framework are provided for reference.

Operational Ratings | Historical Framework

School Year	Rating
2018-2019	HONOR
2019-2020	HONOR

Note: In 2020, the IPCSC reorganized these measures for clarity. Operational outcomes are now divided into two sections (board stewardship and management) based on the primary party responsible for the school's success on each measure.

Operational Ratings: Management | Revised Framework



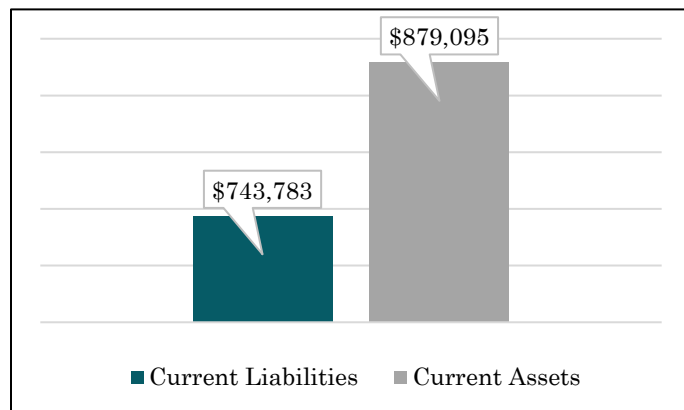
Financial Outcomes

NEAR TERM MEASURES

These measures evaluate whether a school is likely to meet its financial obligations in the next year.
 *Please see the [Performance Framework Rubrics](#) for details regarding how each measure is rated.

Current Ratio

The school has a current ratio of more than 1.5.	Current Ratio 1.18	Ratings Not Applicable for 2020-2021
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Why This Matters:

Current Ratio is a comparison of a school's financial obligations due within one year (current liabilities) to the cash and investments held by the school (current assets).

A school with more assets than liabilities (a Current Ratio greater than 1.0) would be able to meet its financial obligations for the

next year without relying on future revenue.

A school with more liabilities than assets (a Current Ratio of less than 1.0) is dependent on revenue it has not yet received to meet existing financial obligations.

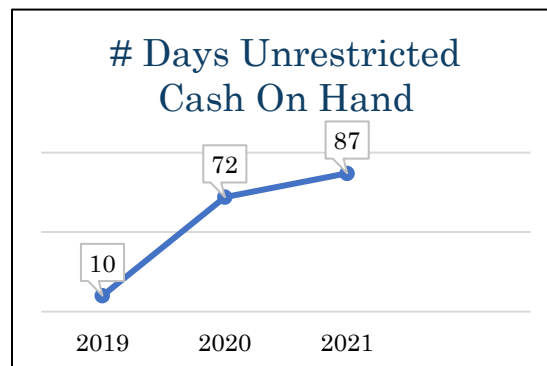
Unrestricted Days Cash

The school has more than 60 days cash on hand	87 Days	Ratings Not Applicable for 2020-2021
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Why this Matters:

This measure estimates a school's average daily cost of operations and considers the number of days a school could operate using only its available cash and investments.

A school with at least 60 days cash on hand would be able to meet its immediate financial obligations with available cash, buying the time it might take to access other current assets. Occasionally, a planned purchase may decrease this number temporarily. In those cases, 30-60 days cash on hand with an upward trend is acceptable. A school with less than 15 days cash on hand is in financial distress and is at risk of automatic closure.



Default

The school is not in default of any financial obligations and did not experience any instances of default during the fiscal year.	Ratings Not Applicable for 2020-2021
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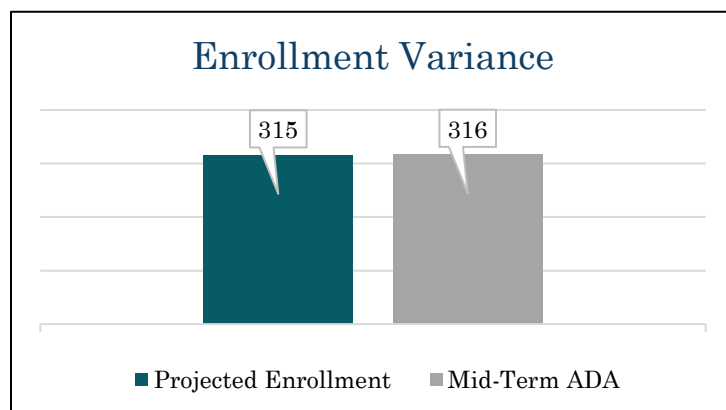
Why this Matters:

This measure identifies whether a school has defaulted on any of its financial obligations. Default can mean many things. Examples of default include: paying bills late, failing to make payroll, or inaccurately filing reports required for funding. Default can also include a failure to meet any additional requirements of long-term debt as established by the lender (such as meeting a specific enrollment target or maintaining a greater amount of cash on hand than the PCSC requires).

Any act of default can result in disruption of services, loans being called due, or funding that is inaccurate or withheld.

Enrollment Variance

The school achieved and sustained at least 95% of its projected enrollment during the most recent school year.	Enrollment Variance 100.32%	Ratings Not Applicable for 2020-2021
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Why this Matters:

The Enrollment Variance measure considers what percentage of a school's projected enrollment was achieved. As the majority of a public school's funding is generated by student enrollment, this measure reflects a school's ability to execute its budget to plan.

A school that achieves at least 95% of its projected enrollment will likely experience few bumps and may make minor adjustments. A school that achieves less than 95% of projected enrollment is likely to face budget challenges requiring more significant budget amendments and may be in financial distress.

Financial Outcomes

SUSTAINABILITY MEASURES

These measures help determine whether a school is likely to remain financially stable into the future.

Total Margin

The school has maintained a positive total margin for at least 3 consecutive years.	CY Total Margin 3.17% 3-Year Aggregated 18.57%	Ratings Not Applicable for 2020-2021
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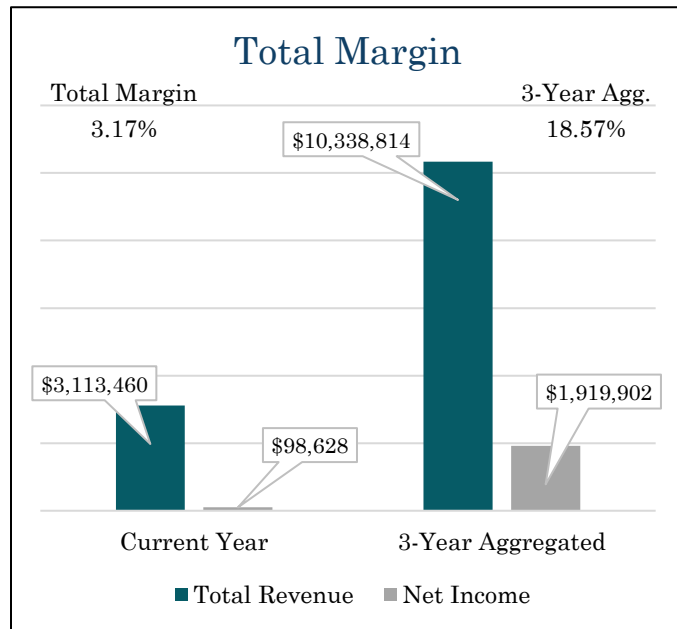
Why this Matters:

The Total Margin compares a school's total revenue to its net income. Specifically, this measure identifies what percentage of a school's total revenue in a given year was not expended during that year. A school with a positive total margin spent less than it brought in. That is, the school is living within its means and can plan for future purchases and investments.

An occasional negative total margin may indicate that a planned or necessary purchase has taken place. This is not necessarily a negative indicator.

However, if the Total Margin is chronically negative or severe decreases appear, the school may be in financial distress. Aggregating this margin over three years helps to identify these long-term trends.

Note: for the purposes of this calculation, pension liability is excluded from the school's net income.



Cash Flow

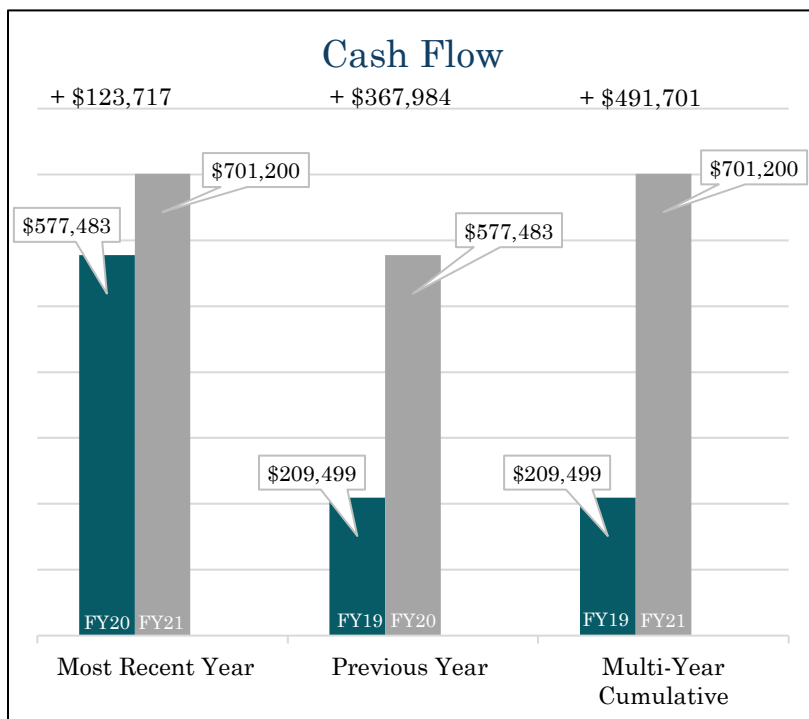
The school's multi-year cumulative cash flow has been positive, and the most recent year's cash flow has been positive for at least 3 consecutive years.	Most Recent Year \$123,717 Previous Year \$367,984 Multi-Year \$491,701	Ratings Not Applicable for 2020-2021
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Why this Matters:

The Cash Flow measure considers the change in a school's cash balance over time. A school with a positive cash flow is increasing its reserves and is likely able to fund future projects and purchases.

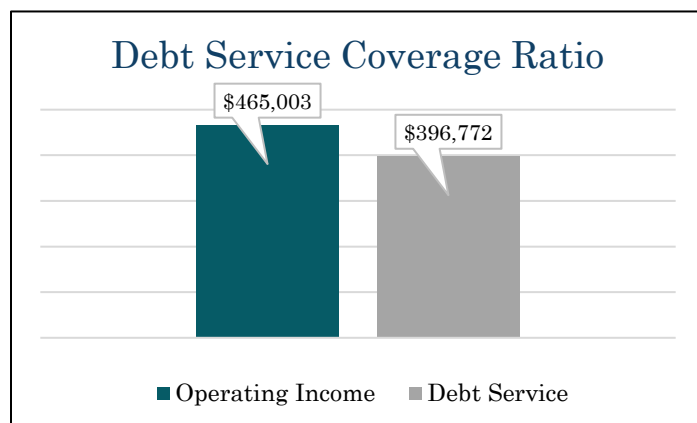
A school with a negative cash flow is using its existing reserves to fund general operations and is not likely to have the financial flexibility to fund future plans.

A multi-year cumulative cash flow helps to identify long-term trends.



Debt Service Coverage Ratio

Debt Service Coverage Ratio is between 1.1 and 1.49.	Debt Service Coverage Ratio 1.17	Ratings Not Applicable for 2020-2021
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Why this Matters:

This measure evaluates a school's ability to make payments on debt due in a given year using only that year's income. This helps determine whether a school has more debt than it can manage.

A school with more Operating Income than Debt Service (a Debt Service Coverage Ratio greater than 1) can meet the financial obligations of their debt. A

school with more Debt Service than Operating Income (a ratio of less than 1) is reliant on either reserves or revenues anticipated in future years to meet its debt obligations.

Debt to Asset Ratio

The school has maintained a debt to asset ratio less than .9 for at least 3 consecutive years.	Debt/Asset Ratio .12	Ratings Not Applicable for 2020-2021
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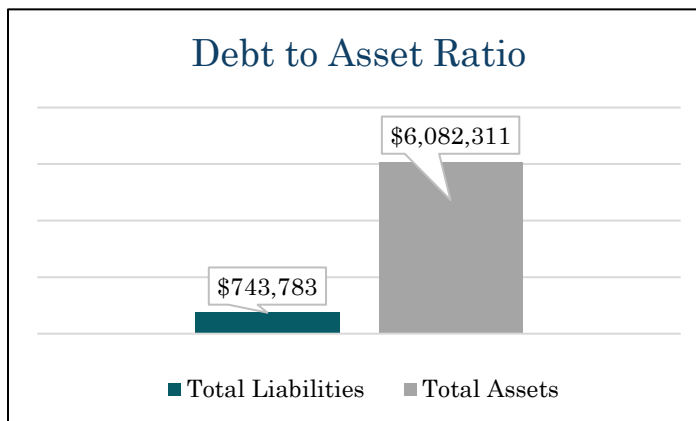
Why This Matters:

The Debt to Asset Ratio compares a school's total liabilities to its total assets. This helps determine whether a school would be able to meet both its short and long-term financial obligations.

A school whose total liabilities are 90% or less of its Total Assets is

likely to be able to repay all short-term debts and still manage to set its long-term affairs in order in a worst-case scenario. A school with more liabilities than assets would not be able to meet all its financial obligations in a worst-case scenario.

Note: for the purposes of this measure, pension liability is excluded from the school's total liabilities.



Financial Compliance

STANDARD RATING: NOT RATED FOR 2020-2021	
Financial Operations	Data and/or Evidence Source
The school's finances are managed in compliance with GAAP.	Financial Audit 10/19/2021
Expenditures and contracts are not posted online appropriately.	School's Expenditure Page 7/30/2021 *See Comments
The school maintains compliant internal controls.	*No instances of non-compliance documented.
The school is not operating under a Notification of Fiscal Concern.	*No instances of non-compliance documented.
The school is not operating under a Notification of Possible or Imminent Closure.	*No instances of non-compliance documented.
Comments/Context IPCSC Staff was unable to verify/locate contracts that support the school's expenditures on the school's website.	

Longitudinal Financial Ratings | 2018-2023

Longitudinal data provides a snapshot of a school's ratings over the school's current performance certificate (5 years). This data helps to identify performance trends and changes over time. Schools are encouraged to consider how this data might be used to drive your strategic planning as your school approach its next renewal decision.

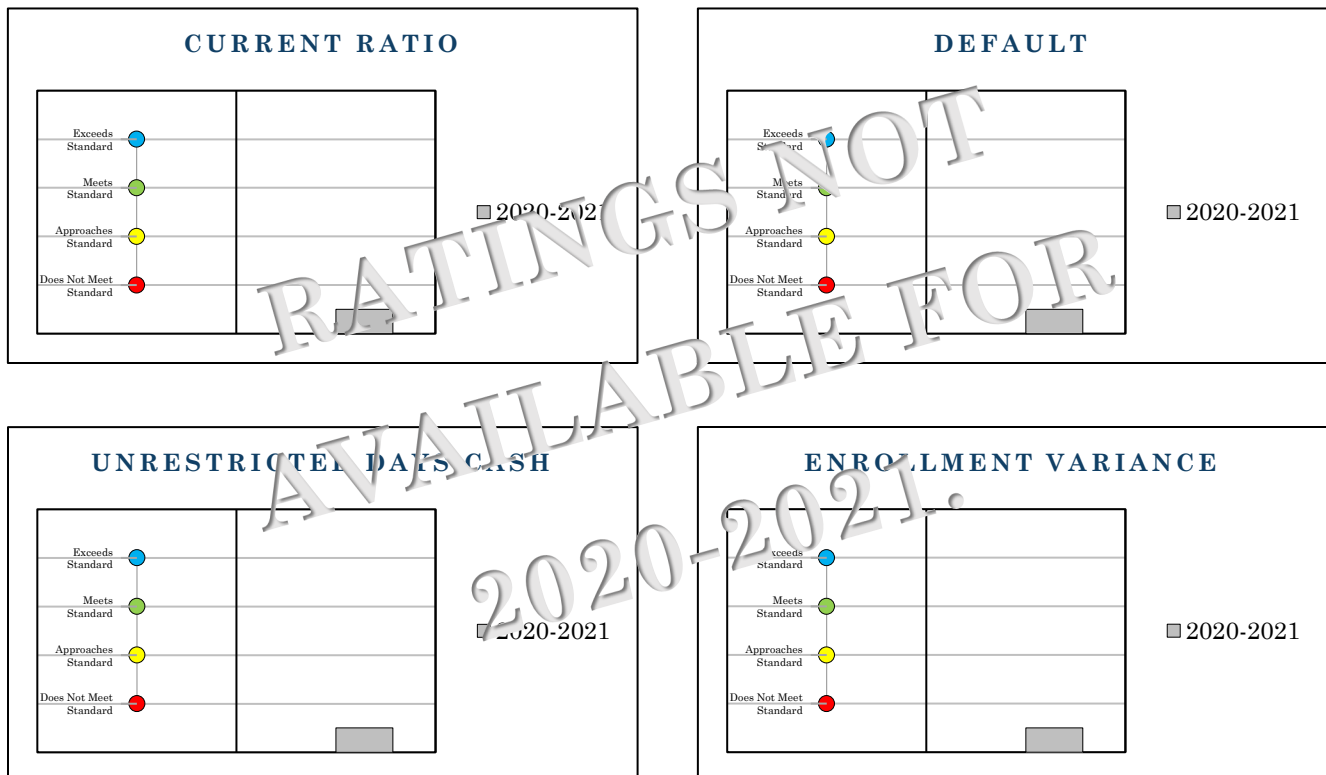
Notes: The 2020 framework revision removed the "cash ratio" measure and moved the existing enrollment variance measure to the financial section.

Due to the impact of the pandemic, financial outcomes are not rated for 2020-21. Additionally, the enrollment variance measure was calculated based on projected enrollment and actual enrollment (not ADA).

Financial Near Term Health Ratings | Historical Framework

School Year	Near Term Health Rating
2018-2019	GOOD STANDING
2019-2020	HONOR

Financial Near Term Health Ratings | Revised Framework



Longitudinal Financial Ratings | 2018-2023

Longitudinal data provides a snapshot of a school's ratings over the school's current performance certificate (5 years). This data helps to identify performance trends and changes over time. Schools are encouraged to consider how this data might be used to drive your strategic planning as your school approach its next renewal decision.

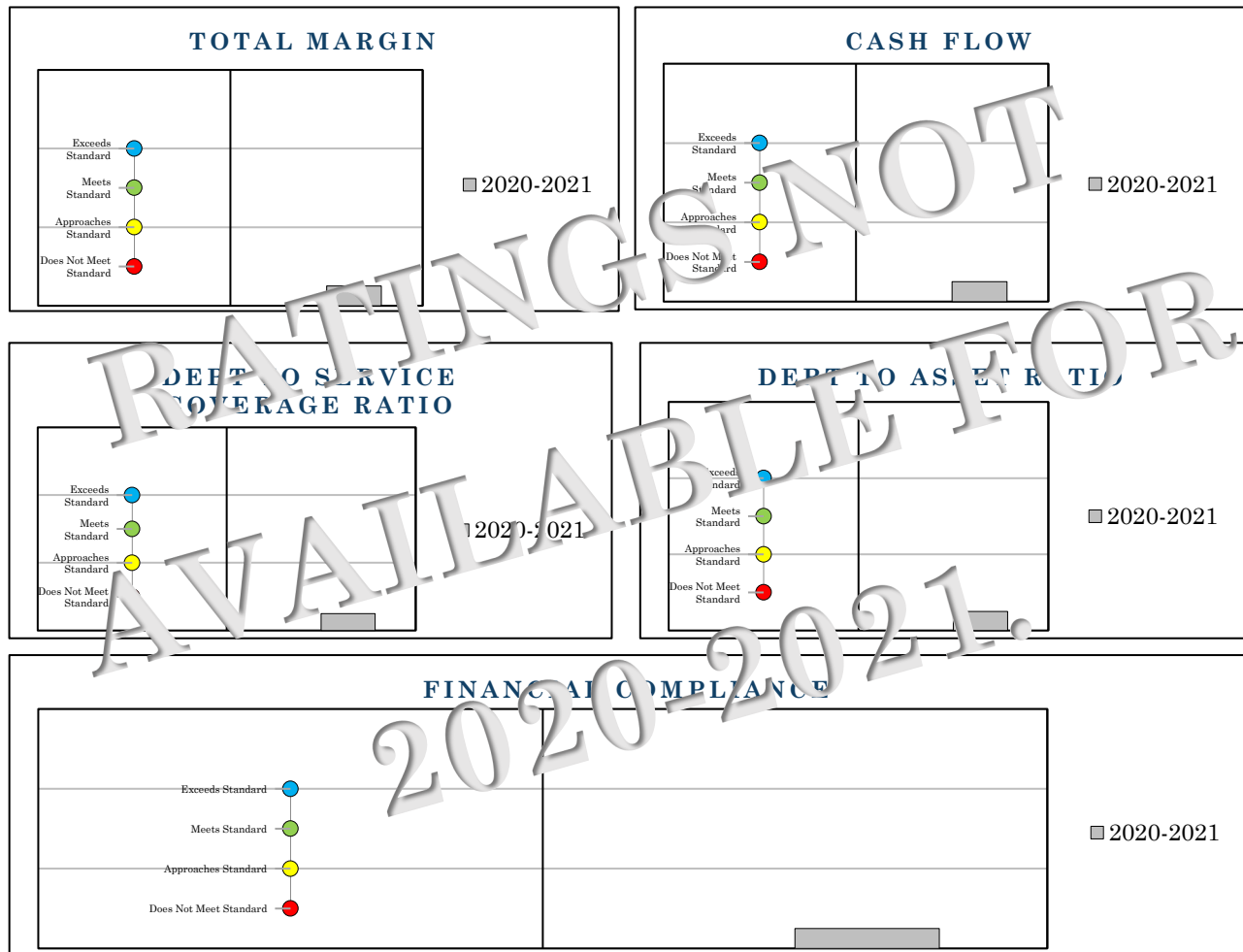
Notes: The 2020 framework revision removed the "cash ratio" measure and moved the existing enrollment variance measure to the financial section.

Due to the impact of the pandemic, financial outcomes are not rated for 2020-21. Additionally, the enrollment variance measure was calculated based on projected enrollment and actual enrollment (not ADA).

Financial Sustainability Ratings | Historical Framework

School Year	Sustainability Rating
2018-2019	GOOD STANDING
2019-2020	HONOR

Financial Sustainability Ratings | Revised Framework



Conditional Certificate Status Update

Idaho Science and Technology Charter School Performance Certificate was renewed in 2019 subject to the conditions listed below. The school's status with regard to each condition is also provided.

Condition 1: Condition Waived

By June 30, 2021, at least fifty-nine percent (59%) of ISTCS's students in grades K-8 will make adequate academic growth to achieve math proficiency on the ISAT within 3 years or by 10th grade, whichever comes first.

This condition is based upon a rate of increase sufficient to promote the school's ability to achieve a "meets standard" rating on Academic Measure 3a (Criterion-Referenced Growth in Math) in the performance framework adopted by the PCSC in May 2017, by the end of the next performance certificate term (June 30, 2023).

The outcome shall be calculated using Academic Measure 3a (Criterion-Referenced Growth in Math). References to the ISAT shall apply to any other statewide assessment selected to replace the ISAT by SBAC in the event of state-level requirement changes.

Status: This condition was waived due to the likely impact of pandemic conditions on assessment data. Revocation will not be considered based on the school's failure to meet this condition at this time.

*The 2020-2021 Annual Report has been finalized by the
Idaho Public Charter School Commission staff.*

If you have any questions or comments, please contact
the IPCSC.



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VIII. FINANCE COMMITTEE REPORT

APPLICABLE STATUTE, RULE, OR POLICY

I.C. §67-3502 – State Agency Budget Preparation
State Board of Education Policy, Section V.B – Budget Policies

BACKGROUND

The IPCSC approved the agency's fiscal year 2024 budget at its April 14th meeting.

DISCUSSION

The timeline applicable to the IPCSC's budget approval process requires that the agency initially approve its annual budget and the line items to be requested before the Division of Financial Management (DFM) has released its annual memo stating applicable restrictions.

IPCSC staff meet with DFM to discuss the agency's needs and paths forward. This meeting was followed by a meeting of the IPCSC Finance Committee at which Commissioner Van Orden (committee chair) reviewed the situation and requested a memo be sent to Commissioners.

No changes were made to the FY24 total appropriation, and the IPCSC has requested 2 additional FTP as approved at the April 14, 2022 meeting. However, at DFM's request, the documentation was revised to reflect how this could be achieved with only a 3% increase to the agency's general fund (approximately \$5,000).

In April of 2023, the IPCSC can revisit the FY24 budget plan and make any adjustments within the granted appropriation.

The memo was sent to commissioners on 4/25/22 and the budget summary and line item requests submitted to the SBE for initial approval are included in these materials.

IMPACT

The State Board of Education will review the budget requests in June and submit them to DFM for final approval in August.

STAFF COMMENTS AND RECOMMENDATIONS

Information Only.

COMMISSION ACTION

No action

PUBLIC CHARTER COMMISSION
FY 2023 Operating Budget

	FY 2022 BUDGET	FY 2023 BUDGET	PERCENT of CHANGE
1 By Program:			
2 Charter School Commission	640,800	678,300	5.85%
3 Total Programs	<u>640,800</u>	<u>678,300</u>	<u>5.85%</u>
4			
5 By Fund Source:			
6 General Fund	174,100	182,400	4.77%
7 Authorizer Fees	466,700	495,900	6.26%
8 Total Funds	<u>640,800</u>	<u>678,300</u>	<u>5.85%</u>
9			
10 By Expenditure Classification:			
11 Personnel Costs	498,400	522,007	4.74%
12 Operating Expenditures:	142,400	147,956	3.90%
13 Capital Outlay	(7) -	-	#DIV/0!
14 Total Expenditures	<u>640,800</u>	<u>669,963</u>	<u>4.55%</u>
15			
16 FTP Count	5.00	5.00	0.00%
17			
18 Notes:			

19 FY2023 budget per HB 725, this includes a 3% CEC for all employees and a \$1.25 allocation based on merit and an annual increase for health benefits
 HB 725, Section 3 reappropriated unexpended/unencumbered balances in the Authorizer Fund at year end FY 2022 for FY2023, to be
 used for nonrecurring expenditures. The State Controller shall confirm the reappropriation amount, by fund, expense class, and program,
 20 with the Legislative Services Office prior to processing the reappropriation authorized herein.

SB 1192, effective July 1, 2021 included \$555,000 as a one time appropriation of dedicated funds as the means by which spending authority was
 21 transferred from OSBE to the IPCSC as an independent agency.



4/25/22

INTERNAL MEMO

On 4/14/22 the IPCSC approved the following budget summary for FY24, including line item requests that would fund two additional FTE:

Commission Approved				
	Personnel	Operations	Capital Outlay	Total
General Fund	\$234,800.00	\$47,600.00	\$25,000.00	\$282,400.00
Authorizer Fees	\$446,310.00	\$148,770.00		\$595,080.00
Total Appropriation	\$681,110.00	\$196,370.00	\$25,000.00	\$877,480.00

The Division of Financial Management encouraged us to submit our budget reflecting the full potential impact to schools should none of the request fall to the General Fund. This allows further evaluation of balance of General Fund and Dedicated Fund revenue for our agency. Shifts between the two can be made as the FY24 budgeting process progresses.

The adjustments below were shared with the Finance Committee on 4/20/22 and will be addressed in the Finance Committee report to the Commission at the June 9th meeting.

Adjusted				
	Personnel	Operations	Capital Outlay	Total
General Fund	\$140,904.00	\$46,968.00		\$187,872.00
Authorizer Fees	\$517,206.00	\$164,402.00	\$8,000.00	\$689,608.00
Total Appropriation	\$658,110.00	\$211,370.00	\$8,000.00	\$877,480.00

Please note, the bottom line remains \$877,480. The capital outlay has been reduced as anticipated furniture costs will not be necessary. Line items 1, 2, and 3, as defined below, are static in either scenario:

FFY 2024 Base	5.00	\$182,400.00	\$538,680.00	\$721,080.00
1. CSC, Financial Specialist	1.00	\$2,736.00	\$79,864.00	\$82,600.00
2. CSC, Technical Records Specialist II	1.00	\$2,736.00	\$63,064.00	\$65,800.00
3. Capital Outlay, Chinden Move	0.00		\$8,000.00	\$8,000.00
FY24 Program Maintenance	7.00	\$187,872.00	\$681,608.00	\$877,480.00

Through the budgeting process, if it does not become possible to shift any of this request to the General Fund, and the IPCSC not be comfortable with the resulting impact to authorizer fees, the IPCSC may reconsider filling the two requested positions in April of 2023, prior to any financial impact.

Making this change now will allow us to present a request for two additional FTE and open the discussion about the balance of General Fund and Dedicated Fund in the agency's overall budget.

Jenn Thompson
Director, Idaho Public Charter School Commission

FY 2024 Line Item Proposal

1. **Agency name(s):** Public Charter School Commission
2. **Line item title:** Charter School Commission General Fund appropriation increase
3. **Problem statement:** PCSC operates with most staff being paid from the agency's dedicated fund. The General Fund appropriation supports the salary of the Director and some operational costs, and is set for a 3% increase. The proposed increase would address CEC increases for the Director, as well as an increase to the General Fund Operating appropriation.
4. **Request description:** Request is to increase General Fund appropriations by 3% from the previous fiscal year from \$182,400 to \$187,872.
5. **Estimated total cost and FTP:** 0 FTP. \$5,472 from General Fund (both Personnel and Operating).

FY 2024 Line Item Proposal

1. **Agency name(s):** Public Charter School Commission
2. **Line item title:** Charter School Commission Authorizer Fee Dedicated Fund Increase, Capital Outlay
3. **Problem statement:** PCSC operates with most staff being paid from the agency's dedicated fund. To provide for the agency relocation, and associated furniture, fixtures, and equipment costs; PCSC requests an additional appropriation of \$8,000 from the Charter School Commission Authorizer Fee dedicated fund. The proposed increase would address the costs of relocating from the Annex to the Chinden campus, as well as anticipated replacement costs for furniture, fixtures, and equipment.
4. **Request description:** Request is to receive \$8,000 in Capital Outlay Charter School Commission Authorizer Fee dedicated fund appropriations.
5. **Estimated total cost and FTP:** 0 FTP. \$8,000 from Authorizer Fee Dedicated Fund.

FY 2024 Line Item Proposal

1. **Agency name(s):** Public Charter School Commission
2. **Line item title:** Charter School Commission Authorizer Fee Dedicated Fund Increase, Personnel.
3. **Problem statement:** PCSC operates with only one staff member trained and scoped to provide financial support. Proper internal controls and separation of duties for financial practices are best served with multiple financial staff. Existing PCSC financial staff also provides oversight for 63 charter schools.

Portfolio Managers manage academic and operational oversight for 31 schools each, necessitating an extra FTP to assist them with data and records management.

With additional schools already approved that will come online in the coming years, this request is being made to keep staff workloads manageable.

4. **Request description:** Request is for funding of one FTP at Financial Specialist II, and one FTP at Technical Records Specialist.
5. **Estimated total cost and FTP:** 1 FTP @ \$23.31/hour + benefits (22.056% + \$11,650) = \$70,828.60 to be assigned to dedicated fund, Charter School Commissioner Authorizer Fees fund. 1 FTP @ \$18.47 + benefits (22.056 + \$11,650) = \$58,540.99.

Total request for 2 FTP = \$129,370.

FY 2024 Line Item Proposal

1. **Agency name(s):** Public Charter School Commission
2. **Line item title:** Charter School Commission Authorizer Fee Dedicated Fund Appropriation Increase, Operating Expenses.
3. **Problem statement:** Adding a Finance Specialist and a Technical Records Specialist to the PCSC team will allow the agency to take a more proactive approach to charter school oversight than has been possible in past years. These crucial staffing additions will allow the agency to pull data-management tasks in-house thereby providing greater opportunity for Program Managers to engage in site visits and field-based work. Should the request for 2 additional FTP be approved, the current funds allocated for operating expenses would be insufficient to facilitate the onboarding of new employees and the increased field work for existing employees.
4. **Request description:** The PCSC respectfully requests an increase to the dedicated fund appropriation by \$56,266 to cover the cost of operations with additional staff and increased field work.
5. **Estimated total cost and FTP:** 0 FTP. \$56,000 from Charter School Commission Authorizer Fee dedicated fund, for operating expenditures.

NOTE: The three line item requests impacting the Charter School Commission Authorizer Fee Dedicated Fund (personnel, operating, and capital outlay) combined would increase the PCSC's Dedicated Fund appropriation by approximately 29% or a total of \$193,708.