

HERITAGE ACADEMY

2018 ANNUAL PERFORMANCE REPORT

INTRODUCTION

Each year, Idaho's Public Charter School Commission (PCSC) issues a performance report to every school in its portfolio. The annual report serves several purposes:

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

This report contains an overview of the school, including its mission, leadership, and demographics. The overview is followed by the school's performance framework, including outcomes for the most recently completed school year.

The performance framework clearly sets forth the academic and operational performance indicators, measures, and metrics that will guide the PCSC's evaluations of the school. It contains indicators, measures, and metrics for student academic proficiency, student academic growth, post-secondary readiness (for high schools), and board performance and stewardship.

In accordance with Idaho law, the performance framework requires, at a minimum, that each school meet applicable federal, state, and authorizer goals for student achievement. It is designed to fulfill this requirement while respecting the diverse missions and student populations represented in PCSC portfolio schools. This performance framework was adopted by the Idaho Public Charter School Commission on May 4th, 2017.

To facilitate a clear context for the academic results contained in this report, the demographic, enrollment, and school leadership information provided is from the school year during which the data was gathered. Updated enrollment and school leadership information is available upon request from the school or PCSC office.

The data provided in this report was gathered primarily through the State Board of Education and State Department of Education. An independent financial audit and any applicable mission-specific data were submitted directly by the school. The school had a opportunity to correct or clarify its framework outcomes prior to the publication of this report.

Public charter school operations are inherently complex. For this reason, readers are encouraged to consider the scores on individual measures within the framework as a starting point for gaining a full, contextualized understanding of the school's performance.

PERFORMANCE FRAMEWORK STRUCTURE

The academic section comprises the primary indicators on which most renewal or non-renewal decisions are based. The mission-specific, operational, and financial sections contribute additional indicators that are, except in cases of egregious failure to meet standards, considered secondary.

Academic	The academic section focuses on quantitative academic outcomes. It reflects the PCSC's commitments to considering schools' performance in the context of their communities and student populations. Although some results may not be made publically available in certain cases, in order to protect individually identifiable student information, the PCSC may still use this information for purposes of making authorizing decisions.
Mission-Specific	The mission-specific section provides an opportunity for meaningful acknowledgement of schools' achievements that are not reflected elsewhere in the framework. These measures may be academic or non-academic in nature, but must be objective and data-driven. Mission-specific measures are generally optional; however, inclusion of certain mission-specific measures may be required as a condition of the performance certificate.
Operational	The operational section considers whether schools are operating in compliance with federal and state law, authorizer requirements, and the provisions of their performance certificates.
Financial	The financial section evaluates the near-term and long-term financial status of the school. Schools with management contracts containing deficit protection clauses may be exempted from these indicators.

ACCOUNTABILITY DESIGNATIONS

Calculation of the percentage of eligible points earned for each school determines that school's accountability designation in each section. The accountability designations, in turn, guide authorizing decisions. The PCSC will consider contextual factors affecting a school's accountability designations when making authorizing decisions.

Honor	Schools achieving at this level in all sections are guaranteed renewal. Replication and expansion proposals are likely to succeed.
Good Standing	Schools achieving at this level in the academic section will be recommended for renewal; however, conditional renewal may be recommended if outcomes in other sections are poor. Replication and expansion proposals will be considered.
Remediation	Schools achieving at this level in the academic section may be recommended for non-renewal or conditional renewal, particularly if outcomes in other sections are poor. Replication and expansion proposals are unlikely to succeed.
Critical	Schools achieving at this level in the academic section face a strong likelihood of non-renewal, particularly if outcomes in other sections are also poor. Replication and expansion proposals will not be considered.

SCHOOL OVERVIEW

Mission Statement	Using the School-Wide Enrichment Model, Heritage Academy will educate students, leading them to develop meta-cognitive skills. In a safe and respectful environment, these skills will allow them to learn how to organize information and solve real-life problems. Our students will graduate with skills in both the core content areas and in critical thinking that will lead to success in school, in the workforce, and in the community.		
Key Design Elements	<p>Use the School Enrichment Model (SEM) to provide expanded educational opportunities for all students based on their strengths and interests in order to engage them in their learning, thereby raising expectations and achievement for all. The fundamental aspects of the Educational Mission are as follows:</p> <p>The Total Talent Portfolio</p> <ul style="list-style-type: none"> ● Each student completes a portfolio at the beginning of the year which provide information about their strengths, interests, learning styles, and styles of expression. ● School personnel (teachers, counselors, etc.) review students' portfolios and use them to provide individualized instruction and support. <p>Enrichment Clusters</p> <ul style="list-style-type: none"> ● Each student participates in at least one enrichment cluster per school year. Clusters last 6-12 weeks and typically meet weekly. ● Students work as individuals or in small groups to produce products or services that solve real-world problems. <p>Strong character development program</p> <ul style="list-style-type: none"> ● Each month, teachers address one of the six Integrity Initiative characteristics with their classes. ● Students are consistently recognized for their demonstration of strong character traits. <p>Safe environment</p> <ul style="list-style-type: none"> ● Students are provided with a safe school facility. ● Students have access to adults willing to listen and protect students' safety. ● Students are provided with education and tools to encourage safe behavior among themselves. ● A strong, anti-bullying policy will be enforced. 		
School Location	500 S. Lincoln Ave Jerome, Idaho, 83338	School Phone	(208) 595-1617
Surrounding District	Jerome School District		
Opening Year	2011		
Current Term	July 1, 2017-June 30, 2022		
Grades Served	K-8		
Enrollment (Approved)	214	Enrollment (Actual)	147

SCHOOL LEADERSHIP

Tiffany Packard	Chairman
LaMar Brooks	Vice Chairman
Jeff Pierson	Secretary
Kris Gilgren	Treasurer
Shawna Lemoine	Member
Karen McGee	Member
Christine Ivie	Administrator

STUDENT DEMOGRAPHICS

	School	State	Surrounding District	Neighboring District
Non-White	43%	25%	54%	N/A
Limited English Proficiency	15%	6%	20%	N/A
Special Needs	20%	10%	10%	N/A
Free and Reduced Lunch	100%*	47%	63%	N/A

*The school qualifies for and participates in the Community Eligibility Provision.

ISAT PROFICIENCY RATES

Percentage of students meeting or exceeding proficiency in Math	%*
Percentage of students meeting or exceeding proficiency in English Language Arts	%*
Percentage of students meeting or exceeding proficiency in Science	%*

*Masked per state law or statistical irrelevance

GO-ON RATE (Post-secondary enrollment within 12 months of graduation)	N/A
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ACADEMIC	Measure	Points Possible	Points Earned	Points Possible	Points Earned	Points Possible	Points Earned	Points Possible	Points Earned
		K-8	K-8	9-12	9-12	K-12	K-12	Alternative	Alternative
State Proficiency Comparison	1a	50		50	0	50	0		
	1b	50		50	0	50	0		
District Proficiency Comparison	2a	50		50	0	50	0	50	0
	2b	50		50	0	50	0	50	0
Criterion-Referenced Growth	3a	100				50	0		
	3b	100				50	0		
Norm-Referenced Growth	4a			100	0	50	0	50	0
	4b			100	0	50	0	50	0
Post-Secondary Readiness	5a			125	0	125	0	100	0
Total Academic Points		400	55	525	0	525	0	300	0
% of Academic Points			14%		0%		0%		0%

MISSION-SPECIFIC	Measure	Points Possible	Points Earned
	1		
	2		
	3		
	4		
	5		
	6		
Total Mission-Specific Points		0	0
% of Mission-Specific Points			

HA has chosen not to include mission-specific measures.

OPERATIONAL	Measure	Points Possible	Points Earned	FINANCIAL	Measure	Points Possible	Points Earned
	1b	25	25		1b	50	0
	1c	25	25		1c	50	0
	1d	25	25		1d	50	50
Financial Management & Oversight	2a	25	25	Sustainability	2a	50	50
	2b	25	25		2b	50	50
	2c	25	0		2c	50	0
Governance & Reporting	3a	25	25		2d	50	0
	3b	25	25	Total Financial Points		400	200
	3c	25	25	% of Financial Points			50%
	3d	25	25				
	3e	25	25				
	3f	25	25				
School Environment	4a	25	25	The financial measures above are based on industry standards. They are not intended to reflect nuances of the school's financial status. Please see the financial section of this framework for relevant contextual information that may alleviate concern.			
	4b	25	25				
Additional Obligations	5a	25	25				
Total Operational Points		400	375				
% of Operational Points			94%				

ACCOUNTABILITY DESIGNATION	Range (% of Points Possible)	Academic Gen Ed Outcome	Academic Alt Outcome	Range	Mission Specific Outcome	Range	Operational Outcome	Range	Financial Outcome
Honor	75% - 100%			75% - 100%		90% - 100%		85% - 100%	
Good Standing	55% - 74%	14%	0%	55% - 74%	NA	80% - 89%	94%	65% - 84%	50%
Remediation	31% - 54%			31% - 54%		61% - 79%		46% - 64%	
Critical	0% - 30%			0% - 30%		0% - 60%		0% - 45%	

School outcomes will be evaluated in light of contextual information, including student demographics, school mission, and state/federal requirements.

ACADEMIC K-8

All proficiency and growth measures will be scored using the ISAT by SBAC, or any state-required standardized test as may replace it. Subject area (math and ELA) may be replaced by similar subject areas if necessary due to statewide changes. On all applicable measures, standard rounding to the nearest whole number will be used for scoring purposes. Measures based on ISAT outcomes exclude alternate ISAT data; as a result, the outcomes shown may differ slightly from those published on the State Department of Education's website.

INDICATOR 1: STATE PROFICIENCY COMPARISON																	
Measure 1a Math Proficiency Rate Comparison to State	Do math proficiency rates meet or exceed the state average? Exceeds Standard: The school's proficiency rate in math exceeds the state average by 16 percentage points or more. Meets Standard: The school's proficiency rate in math is equal to the state average, or exceeds it by 1 - 15 percentage points. Does Not Meet Standard: The school's proficiency rate in math is 1 - 15 percentage points lower than the state average. Falls Far Below Standard: The school's proficiency rate in math is 16 or more percentage points lower than the state average.	<table border="1"> <thead> <tr> <th>Result</th> <th>Points Possible</th> <th>Points Earned</th> </tr> </thead> <tbody> <tr> <td></td> <td>50</td> <td></td> </tr> <tr> <td></td> <td>30 - 45</td> <td></td> </tr> <tr> <td></td> <td>15 - 29</td> <td></td> </tr> <tr> <td></td> <td>0 - 14</td> <td></td> </tr> </tbody> </table>	Result	Points Possible	Points Earned		50			30 - 45			15 - 29			0 - 14	
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	50																
	30 - 45																
	15 - 29																
	0 - 14																
Notes	The state average will be determined using the same grade set as is served by the public charter school.																
Measure 1b ELA Proficiency Rate Comparison to State	Do English Language Arts proficiency rates meet or exceed the state average? Exceeds Standard: The school's proficiency rate in ELA exceeds the state average by 16 percentage points or more. Meets Standard: The school's proficiency rate in ELA is equal to the state average, or exceeds it by 1 - 15 percentage points. Does Not Meet Standard: The school's proficiency rate in ELA is 1 - 15 percentage points lower than the state average. Falls Far Below Standard: The school's proficiency rate in ELA is 16 or more percentage points lower than the state average.	<table border="1"> <thead> <tr> <th>Result</th> <th>Points Possible</th> <th>Points Earned</th> </tr> </thead> <tbody> <tr> <td></td> <td>50</td> <td></td> </tr> <tr> <td></td> <td>30 - 45</td> <td></td> </tr> <tr> <td></td> <td>15 - 29</td> <td></td> </tr> <tr> <td></td> <td>0 - 14</td> <td></td> </tr> </tbody> </table>	Result	Points Possible	Points Earned		50			30 - 45			15 - 29			0 - 14	
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INDICATOR 2: DISTRICT PROFICIENCY COMPARISON																	
Measure 2a	Do math proficiency rates meet or exceed the district average?	<table border="1"> <thead> <tr> <th>Result</th> <th>Points Possible</th> <th>Points Earned</th> </tr> </thead> <tbody> <tr> <td></td> <td>50</td> <td></td> </tr> <tr> <td></td> <td>30 - 45</td> <td></td> </tr> <tr> <td></td> <td>15 - 29</td> <td></td> </tr> <tr> <td></td> <td>0 - 14</td> <td></td> </tr> </tbody> </table>	Result	Points Possible	Points Earned		50			30 - 45			15 - 29			0 - 14	
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	50																
	30 - 45																
	15 - 29																
	0 - 14																
Math Proficiency Rate Comparison to District	Exceeds Standard: The school's proficiency rate in math either exceeds the district average by 16 percentage points or more, or is at least 80%.																
	Meets Standard: The school's proficiency rate in math is equal to the district average, or exceeds it by 1 - 15 percentage points.																
	Does Not Meet Standard: The school's proficiency rate in math is 1 - 15 percentage points lower than the district average.																
	Falls Far Below Standard: The school's proficiency rate in math is 16 or more percentage points lower than the district average.																
Notes	The district average will be determined using the same grade set as is served by the public charter school. Jerome School District will be used for comparison purposes.																
Measure 2b	Do ELA proficiency rates meet or exceed the district average?	<table border="1"> <thead> <tr> <th>Result</th> <th>Points Possible</th> <th>Points Earned</th> </tr> </thead> <tbody> <tr> <td></td> <td>50</td> <td></td> </tr> <tr> <td></td> <td>30 - 45</td> <td></td> </tr> <tr> <td></td> <td>15 - 29</td> <td></td> </tr> <tr> <td></td> <td>0 - 14</td> <td></td> </tr> </tbody> </table>	Result	Points Possible	Points Earned		50			30 - 45			15 - 29			0 - 14	
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	50																
	30 - 45																
	15 - 29																
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ELA Proficiency Rate Comparison to District	Exceeds Standard: The school's proficiency rate in ELA either exceeds the district average by 16 percentage points or more, or is at least 80%.																
	Meets Standard: The school's proficiency rate in ELA is equal to the district average, or exceeds it by 1 - 15 percentage points.																
	Does Not Meet Standard: The school's proficiency rate in ELA is 1 - 15 percentage points lower than the district average.																
	Falls Far Below Standard: The school's proficiency rate in ELA is 16 or more percentage points lower than the district average.																
Notes	The district average will be determined using the same grade set as is served by the public charter school. Jerome School District will be used for comparison purposes.																

INDICATOR 3: CRITERION-REFERENCED STUDENT GROWTH (GRADES K-8)			
Measure 3a Criterion-Referenced Growth Math	Are students making adequate academic growth to achieve math proficiency within 3 years or by 10th grade? Exceeds Standard: At least 85% of students are making adequate academic growth in math. Meets Standard: Between 70% and 84% of students are making adequate academic growth in math. Does Not Meet Standard: Between 50% and 69% of students are making adequate academic growth in math. Falls Far Below Standard: Fewer than 50% of students are making adequate academic growth in math.	Result [Redacted]	Points Possible 76-100 51-75 26-50 0-25 Points Earned [Redacted]
Notes			
Measure 3b Criterion-Referenced Growth ELA	Are students making adequate academic growth to achieve English Language Arts proficiency within 3 years or by 10th grade? Exceeds Standard: At least 85% of students are making adequate academic growth in ELA. Meets Standard: Between 70% and 84% of students are making adequate academic growth in ELA. Does Not Meet Standard: Between 50% and 69% of students are making adequate academic growth in ELA. Falls Far Below Standard: Fewer than 50% of students are making adequate academic growth in ELA.	Result [Redacted]	Points Possible 76-100 51-75 26-50 0-25 Points Earned [Redacted]
Notes			

INDICATOR 1: EDUCATIONAL PROGRAM				
Measure 1a	Is the school implementing the material terms of the educational program as defined in the charter and performance certificate?	Result	Points Possible	Points Earned
Implementation of Educational Program	<p>Meets Standard: The school implements the material terms of the mission, vision, and educational program in all material respects, and the implementation of the educational program reflects the essential elements outlined in the charter and performance certificate. A cohesive professional development program is utilized.</p> <p>Partially Meets Standard: The school partially implements the material terms of the mission, vision, and educational program. However, implementation is incomplete, not cohesive, inconsistent, unclear, and/or unsupported by adequate resources and professional development.</p> <p>Does Not Meet Standard: The school has deviated from the material terms of the mission, vision, and/or essential elements of the educational program as described in the performance certificate, without an approved amendment, such that the program provided differs substantially from the program described in the charter and performance certificate.</p>	No instances of non-compliance documented	25	25
			15	
			0	
				25
Notes				
Measure 1b	Is the school complying with applicable educational requirements?	Result	Points Possible	Points Earned
Educational Requirements	<p>Meets Standard: The school materially complies with applicable laws, rules, regulations, and provisions of the performance certificate relating to educational requirements, including but not limited to: Instructional time requirements, graduation, and promotional requirements, content standards including the Common Core State Standards, the Idaho State Standards, state assessments, and implementation of mandated programming related to state or federal funding.</p> <p>Partially Meets Standard: The school has exhibited non-compliance with applicable laws, rules, regulations, or provisions of the performance certificate relating to educational requirements; however, matters of non-compliance are minor and quickly remedied, with documentation, by the governing board.</p> <p>Does Not Meet Standard: The school exhibits frequent and/or significant non-compliance with applicable laws, rules, regulations, and provisions of the performance certificate relating to educational requirements; and/or matters of non compliance are not quickly remedied, with documentation, by the governing board.</p>	No instances of non-compliance documented	25	25
			15	
			0	
				25
Notes				

OPERATIONAL

Measure 1c	Is the school protecting the rights of students with disabilities?	Result	Points Possible	Points Earned
Students with Disabilities	<p>Meets Standard: The school materially complies with applicable laws, rules, regulations, and provisions of the performance certificate relating to the treatment of students with identified disabilities and those suspected of having a disability, including but not limited to: Equitable access and opportunity to enroll; identification and referral, appropriate development and implementation of IEPs and Section 504 plans; operational compliance, including provisions of services in the LRE and appropriate inclusion in the school's academic program, assessments, and extracurricular activities; discipline, including due process protections, manifestation determinations, and behavioral intervention plans; access to school's facility and programs; appropriate use of all available applicable funding.</p> <p>Partially Meets Standard: The school largely exhibits compliance with applicable laws, rules, regulations, or provisions of the performance certificate relating to the treatment of students with identifiable disabilities and those suspected of having a disability. Instances of non-compliance are minor and quickly remedied, with documentation, by the governing board.</p> <p>Does Not Meet Standard: The school exhibits frequent and/or significant non-compliance with applicable laws, rules, regulations, or provisions of the performance certificate relating to the treatment of students with identifiable disabilities and those suspected of having a disability; and/or matters of non compliance are not quickly remedied, with documentation, by the governing board.</p>	No instances of non-compliance documented	25	25
			15	
			0	
Notes				25
Measure 1d	Is the school protecting the rights of English Language Learner (ELL) students?	Result	Points Possible	Points Earned
English Language Learners	<p>Meets Standard: The school materially complies with applicable laws, rules, regulations , and provisions of the performance certificate relating to requirements regarding ELLs, including but not limited to: Equitable access and opportunity to enroll; required policies related to the service of ELL students; compliance with native language communication requirements; proper steps for identification of students in need of ELL services; appropriate and equitable delivery of services to identified students; appropriate accommodations on assessments; exiting students from ELL services; and ongoing monitoring of exited students.</p> <p>Partially Meets Standard: The school has exhibited non-compliance with applicable laws, rules, regulations, or provisions of the performance certificate relating to the treatment of ELL students; however, matters of non-compliance are minor and quickly remedied, with documentation, by the governing board.</p> <p>Does Not Meet Standard: The school exhibits frequent and/or significant non-compliance with applicable laws, rules, regulations, or provisions of the performance certificate relating to requirements regarding ELLs; and/or matters of non compliance are not quickly remedied, with documentation, by the governing board.</p>	No instances of non-compliance documented	25	25
			15	
			0	
Notes				25

INDICATOR 2: FINANCIAL MANAGEMENT AND OVERSIGHT			Result	Points Possible	Points Earned
Measure 2a Financial Reporting and Compliance	Is the school meeting financial reporting and compliance requirements? Meets Standard: The school materially complies with applicable laws, rules, regulations, and provisions of the performance certificate relating to financial reporting requirements, including but not limited to: Complete and on-time submission of financial reports including annual budget, revised budgets (if applicable) periodic financial reports as required by PCSC, and any reporting requirements if the board contracts with an Education Service Provider; on-time completion and submission of the annual independent audit and corrective action plans (if applicable); and all reporting requirements related to the use of public funds. Partially Meets Standard: The school largely exhibits compliance with applicable laws, rules, regulations, and provisions of the performance certificate relating to financial reporting requirements. Instances of non-compliance are minor and quickly remedied, with documentation, by the governing board. Does Not Meet Standard: The school exhibits frequent and/or significant non-compliance with applicable laws, rules, regulations, or provisions of the performance certificate relating to financial reporting requirements; and/or matters of non compliance are not quickly remedied, with documentation, by the governing board.	Non instances of non-compliance documented	25 15 0	25	
Notes					
Measure 2b GAAP	Is the school following General Accepted Accounting Principles (GAAP) Meets Standard: The school materially complies with applicable laws, rules, regulations, and provisions of the performance certificate relating to financial management and oversight expectations as evidenced by an annual independent audit, including but not limited to: An unqualified audit option, an audit devoid of significant findings and conditions, material weakness, or significant internal control weaknesses; and an audit that does not include a going concern disclosure in the notes or an explanatory paragraph within the audit report. Partially Meets Standard: The school largely exhibits compliance with applicable laws, rules, regulations, and provisions of the performance certificate relating to financial management and oversight expectations as evidenced by an annual independent audit. Any matters of non-compliance are minor and quickly remedied, with documentation, by the governing board. Does Not Meet Standard: The school exhibits failure to comply with applicable laws, rules, regulations, or provisions of the performance certificate relating to financial management and oversight expectations as evidenced by an annual independent audit; and/or matters of non compliance are not quickly remedied, with documentation, by the governing board.	See note	25 15 0	25	
Notes	Points are not deducted from this measure for failure to comply with GASB Statement 75.				
Measure 2c Enrollment Variance	Is the school successfully enrolling the projected number of students? Meets Standard: Enrollment variance equaled or exceeded 95 percent in the most recent fiscal year. Partially Meets Standard: Enrollment variance was between 90 and 95 percent in the most recent fiscal year. Does Not Meet Standard: Enrollment variance was less than 90 percent in the most recent fiscal year.	78%	25 15 0	0 0	
Notes	Enrollment variance is calculated by dividing actual mid-term enrollment by the enrollment projection in the school's board-approved budget, as submitted to the SDE at the beginning of the fiscal year.				

INDICATOR 3: GOVERNANCE AND REPORTING			
Measure 3a	Is the school complying with governance requirements?	Result	Points Possible
Governance Requirements	<p>Meets Standard: The school materially complies with applicable laws, rules, regulations, and provisions of the performance certificate relating to governance by its board, including but not limited to: board policies; board bylaws; code of ethics; conflicts of interest; board composition; and compensation for attendance at meetings.</p> <p>Partially Meets Standard: The school largely exhibits compliance with applicable laws, rules, regulations, and provisions of the performance certificate relating to governance by its board. Instances of non-compliance are minor and quickly remedied, with documentation, by the governing board.</p> <p>Does Not Meet Standard: The school exhibits frequent and/or significant failure to materially comply with applicable laws, rules, regulations, or provisions of the performance certificate relating to governance by its board; and/or matters of non compliance are not quickly remedied, with documentation, by the governing board.</p>	No instances of non-compliance documented	Points Earned
			25
			15
			0
Notes			25
Measure 3b	Is the board fulfilling its oversight obligations?	Result	Points Possible
Board Oversight	<p>Meets Standard: The school's board practices consistent, effective oversight of the school, including but not limited to frequent review of the school finances and academic outcomes. Board meeting agendas, packets, and minutes reflect competent oversight practices and actions to foster academic, operational, and financial strength of the school, including ongoing board training, policy review, and strategic planning. The school's board has adopted and maintains a complete policy book.</p> <p>Partially Meets Standard: Some of the school board's oversight practices are underdeveloped, inconsistent, incomplete, or reflect a need for additional training. Board meeting agendas, packets, and minutes reflect meaningful efforts toward self-evaluation and improvement. The school's policy book may be substantially complete but require additional maintenance.</p> <p>Does Not Meet Standard: The school's board fails to practice consistent, effective oversight of the school, and/or documentation of competent oversight practices and actions is not maintained. The school's policy book may be incomplete, unmaintained, or non-existent.</p>	No instances of non-compliance documented	Points Earned
			25
			15
			0
Notes			25

OPERATIONAL

Measure 3c	Is the school complying with reporting requirements?	Result	Points Possible	Points Earned
Reporting Requirements	<p>Meets Standard: The school materially complies with applicable laws, rules, regulations, and provisions of the performance certificate relating to relevant reporting requirements to the PCSC, the SDE, the SBOE, and/or federal authorities, including but not limited to: accountability tracking; attendance and enrollment reporting; compliance and oversight; and additional information requested by the authorizer.</p> <p>Partially Meets Standard: The school largely exhibits compliance with applicable laws, rules, regulations, and provisions of the performance certificate relating to relevant reporting requirements to the PCSC, the SDE, the SBOE, and/or federal authorities. Instances of non-compliance are minor and quickly remedied, with documentation, by the governing board.</p> <p>Does Not Meet Standard: The school exhibits frequent and/or significant failure to materially comply with applicable laws, rules, regulations, and provisions of the performance certificate relating to relevant reporting requirements to the PCSC, the SDE, the SBOE, and/or federal authorities; and/or matters of non-compliance are not quickly remedied, with documentation, by the governing board.</p>	No instances of non-compliance documented	25	25
			15	
			0	
				25
Notes				
Measure 3d	Is the school complying with public transparency requirements?	Result	Points Possible	Points Earned
Public Transparency	<p>Meets Standard: The school materially complies with applicable laws, rules, regulations, and provisions of the performance certificate relating to public transparency, including but not limited to: maintenance of its website, timely availability of board meeting minutes, and accessibility of documents maintained by the school under the state's Freedom of Information Act, Open Meeting Law, Public Records Law, and other applicable authorities.</p> <p>Partially Meets Standard: The school materially complies with applicable laws, rules, regulations, and provisions of the performance certificate relating to public transparency. Any instances of non-compliance are minor and quickly remedied, with documentation, by the governing board.</p> <p>Does Not Meet Standard: The school exhibits frequent and/or significant failure to materially comply with applicable laws, rules, regulations, and provisions of the performance certificate relating to public transparency; and/or matters of non-compliance are not quickly remedied, with documentation, by the governing board.</p>	No instances of non-compliance documented	25	25
			15	
			0	
				25
Notes				

OPERATIONAL

Measure 3e	Is the school meeting employee credentialing and background check requirements?	Result	Points Possible	Points Earned
Credentialing & Background Checks	<p>Meets Standard: The school materially complies with applicable laws, rules, regulations, and requirements of the performance certificate relating to state and federal certification and background check requirements.</p> <p>Partially Meets Standard: The school materially complies with applicable laws, rules, regulations, and provisions of the performance certificate relating to state and federal certification and background check requirements. Instances of non-compliance are minor and quickly remedied, with documentation, by the governing board.</p> <p>Does Not Meet Standard: The school exhibits frequent and/or significant failure to materially comply with applicable laws, rules, regulations, or provisions of the performance certificate relating to state and federal certification and background check requirements; and/or matters of non-compliance are not quickly remedied, with documentation, by the governing board.</p>	No instances of non-compliance documented	25	25
Notes			15	0
			25	
Measure 3f	Is the school handling information appropriately?	Result	Points Possible	Points Earned
Information Handling	<p>Meets Standard: The school materially complies with applicable laws, rules, regulations, and requirements of the performance certificate relating to the handling of information, including but not limited to: maintaining the security of student records under the Family Educational Rights and Privacy Act and other applicable authorities; storing and transferring student and personnel records; and securely maintaining testing materials.</p> <p>Partially Meets Standard: The school largely exhibits compliance with applicable laws, rules, regulations, and requirements of the performance certificate relating to the handling of information. Instances of non-compliance are minor and quickly remedied, with documentation, by the governing board.</p> <p>Does Not Meet Standard: The school exhibits frequent and/or significant failure to materially comply with applicable laws, rules, regulations, or provisions of the performance certificate relating to the handling of information; and/or matters of non-compliance are not quickly remedied, with documentation, by the governing board.</p>	No instances of non-compliance documented	25	25
Notes			15	0
			25	

INDICATOR 4: SCHOOL ENVIRONMENT			
Measure 4a	Is the school complying with transportation requirements?	Result	Points Possible
Transportation	<p>Meets Standard: The school provides student transportation within its primary attendance area and materially complies with applicable laws, rules, regulations, and requirements of the performance certificate relating to transportation.</p> <p>Partially Meets Standard: The school largely exhibits compliance with applicable laws, rules, regulations, or requirements of the performance certificate relating to transportation; and/or provides an incomplete form of transportation services. Instances of non-compliance are minor and quickly remedied, with documentation, by the governing board.</p> <p>Does Not Meet Standard: The school exhibits frequent and/or significant failure to materially comply with applicable laws, rules, regulations, or provisions of the performance certificate relating to transportation; and/or matters of non-compliance are not quickly remedied, with documentation, by the governing board; and/or the school does not provide transportation.</p>	No instances of non-compliance documented	Points Earned
			25
			15
			0
			25
Notes			
Measure 4b	Is the school complying with facilities requirements?	Result	Points Possible
Public Transparency	<p>Meets Standard: The school materially complies with applicable laws, rules, regulations, and requirements of the performance certificate relating to the school facilities and grounds, including but not limited to: Americans with Disabilities Act, fire inspections and related records, viable certification of occupancy or other required building use authorization, and documentation of requisite insurance coverage. The school facility is clean, well-maintained, and adequate for school operations.</p> <p>Partially Meets Standard: The school largely exhibits compliance with applicable laws, rules, regulations, and requirements of the performance certificate relating to the school facilities and grounds. Instances of non-compliance are minor and quickly remedied, with documentation, by the governing board. Additional facility maintenance and/or updates have been recommended by DBS.</p> <p>Does Not Meet Standard: The school exhibits frequent and/or significant failure to materially comply with applicable laws, rules, regulations, or provisions of the performance certificate relating to the school facilities and grounds; and/or matters of non-compliance are not quickly remedied, with documentation, by the governing board. The school facility may be in need of modification or repair required by DBS.</p>	No instances of non-compliance documented	Points Earned
			25
			15
			0
			25
Notes			

INDICATOR 5: ADDITIONAL OBLIGATIONS				
Measure 5a	Is the school complying with all other obligations?	Result	Points Possible	Points Earned
Additional Obligations	<p>Meets Standard: The school materially complies with all other material legal, statutory, regulatory, or contractual requirements that are not otherwise explicitly stated herein, including but not limited to requirements from the following sources: revisions to statute and administrative rule; requirements of the State Department of Education; and requirements of the accrediting body.</p> <p>Partially Meets Standard: The school largely complies with all other material legal, statutory, regulatory, or contractual requirements that are not otherwise explicitly stated herein. Matters of non-compliance, if any, are minor and quickly remedied, with documentation, by the governing board.</p> <p>Does Not Meet Standard: The school exhibits frequent and/or significant failure to materially comply with all other material legal, statutory, regulatory, or contractual requirements contained in its charter contract that are not otherwise explicitly stated herein; and/or matters of non-compliance are not quickly remedied, with documentation, by the governing board.</p>	No instances of non-compliance documented	25	25
			15	
			0	
				25
Notes				

FINANCIAL

INDICATOR 1: NEAR-TERM													
Measure 1a Current Ratio	Current Ratio: Current Assets divided by Current Liabilities Meets Standard: Current Ratio is greater than or equal to 1.1 OR Current Ratio is between 1.0 and 1.1 and one-year trend is positive (current year ratio is higher than last year's). <i>Note: For schools in their first or second year of operation, the current ratio must be greater than or equal to 1.1.</i> Does Not Meet: Current Ratio is between 0.9 and 1.0 or equals 1.0 OR Current Ratio is between 1.0 and 1.1 and one-year trend is negative. Falls Far Below Standard: Current ratio is less than or equal to 0.9.	Result 1.54	<table border="1"> <thead> <tr> <th>Points Possible</th> <th>Points Earned</th> </tr> </thead> <tbody> <tr> <td>50</td> <td>50</td> </tr> <tr> <td>10</td> <td></td> </tr> <tr> <td>0</td> <td></td> </tr> <tr> <td></td> <td style="border-top: 1px solid black;">50</td> </tr> </tbody> </table>	Points Possible	Points Earned	50	50	10		0			50
Points Possible	Points Earned												
50	50												
10													
0													
	50												
Notes													
Measure 1b Cash Ratio	Current Ratio: Cash divided by Current Liabilities Meets Standard: Cash Ratio is greater than 1.0 OR Cash Ratio is equal to 1.0 and one-year trend is positive (current year ratio is higher than last year's). Does Not Meet: Cash Ratio is between 0.9 and 1.0 OR Cash Ratio equals 1.0 and one-year trend is negative. Falls Far Below Standard: Cash ratio is equal to or less than 0.9.	Result 0.37	<table border="1"> <thead> <tr> <th>Points Possible</th> <th>Points Earned</th> </tr> </thead> <tbody> <tr> <td>50</td> <td></td> </tr> <tr> <td>10</td> <td></td> </tr> <tr> <td>0</td> <td>0</td> </tr> <tr> <td></td> <td style="border-top: 1px solid black;">0</td> </tr> </tbody> </table>	Points Possible	Points Earned	50		10		0	0		0
Points Possible	Points Earned												
50													
10													
0	0												
	0												
Notes	Due to an error on ISEE reports, it is possible that some funds due to the school in FY18 did not arrive until FY19. This error may have negatively impacted this measure for FY18.												
Measure 1c Unrestricted Days Cash	Unrestricted Days Cash: Unrestricted Cash divided by (Total Expenses minus Depreciation Expense/365) Meets Standard: 60 Days Cash OR Between 30 and 60 Days Cash and one-year trend is positive. <i>Note: Schools in their first or second year of operation must have a minimum of 30 Days Cash.</i> Does Not Meet: Days Cash is between 15-30 days OR Days Cash is between 30-60 days and one-year trend is negative. Falls Far Below Standard: Fewer than 15 Days Cash.	Result 10 days	<table border="1"> <thead> <tr> <th>Points Possible</th> <th>Points Earned</th> </tr> </thead> <tbody> <tr> <td>50</td> <td></td> </tr> <tr> <td>10</td> <td></td> </tr> <tr> <td>0</td> <td>0</td> </tr> <tr> <td></td> <td style="border-top: 1px solid black;">0</td> </tr> </tbody> </table>	Points Possible	Points Earned	50		10		0	0		0
Points Possible	Points Earned												
50													
10													
0	0												
	0												
Notes	Due to an error on ISEE reports, it is possible that some funds due to the school in FY18 did not arrive until FY19. This error may have negatively impacted this measure for FY18.												
Measure 1d Default	Default Meets Standard: School is not in default of financial obligations. Financial obligations include, but are not limited to: nonpayment, breach of financial representation, non-reporting, non-compliance, financial judgements, loan covenants, and/or tax obligations. Does Not Meet: School is in default of financial obligations.	Result No default noted	<table border="1"> <thead> <tr> <th>Points Possible</th> <th>Points Earned</th> </tr> </thead> <tbody> <tr> <td>50</td> <td>50</td> </tr> <tr> <td>0</td> <td></td> </tr> <tr> <td></td> <td style="border-top: 1px solid black;">50</td> </tr> </tbody> </table>	Points Possible	Points Earned	50	50	0			50		
Points Possible	Points Earned												
50	50												
0													
	50												
Notes													

FINANCIAL

INDICATOR 2: SUSTAINABILITY			Result	Points Possible	Points Earned
Measure 2a Total Margin and Aggregated 3-Year Total Margin	Total Margin: Net Income divided by Total Revenue AND Aggregated Total Margins: Total 3-Year Net Income divided by Total 3-Year Revenues. Meets Standard: Aggregated 3-year Total Margin is positive and the most recent year Total Margin is positive OR Aggregated 3-Year Total Margin is greater than -1.5 percent, the trend is positive for the last two years, and the most recent year Total Margin is positive. <i>Note: For schools in their first or second year of operation, the cumulative Total Margin must be positive.</i> Does Not Meet: Aggregated 3-Year Total Margin is greater than -1.5 percent, but trend does not "Meet Standard". Falls Far Below Standard: Aggregated 3-Year Total Margin is less than or equal to -1.5 percent OR the most recent year Total Margin is less than -10 percent.	See note	50 30 0	50 50	
Notes	Aggregated 3-year Total Margin is positive and most recent year Total Margin is positive. Due to the Reinstatement of Pension Liability, as required by GASB 68, Net Position may be higher than expected. Changes in Net Position due to pension reinstatement that do not provide or require current financial resources have been removed from the Net Position calculation. This reinstatement had no material effect on the outcome for this measure.				
Measure 2b Debt to Asset Ratio	Debt to Asset Ratio: Total Liabilities divided by Total Assets Meets Standard: Debt to Asset Ratio is less than 0.9. Does Not Meet: Debt to Asset Ratio is between 0.9. and 1.0 Falls Far Below Standard: Debt to Asset Ratio is greater than 1.0	0.2	50 30 0	50 50	
Notes	Due to the Reinstatement of Pension Liability, as required by GASB 68, Net Position may be higher than expected. Changes in Net Position due to pension reinstatement that do not provide or require current financial resources have been removed from the Net Position calculation. This reinstatement had no material effect on the outcome for this measure.				
Measure 2c Cash Flow	Cash Flow: Multi-Year Cash Flow = Year 3 Total Cash - Year 1 Total Cash AND One -Year Cash Flow = Year 2 Total Cash - Year 1 Total Cash Meets Standard: Multi-Year Cumulative Cash Flow is positive and Cash Flow is positive each year OR Multi-Year Cumulative Cash Flow is positive, Cash Flow is positive in one of two years, and Cash Flow in the most recent year is positive. <i>Note: Schools in their first or second year of operation must have positive cash flow.</i> Does Not Meet: Multi-Year Cumulative Cash Flow is positive, but trend does not "Meet Standard" Falls Far Below Standard: Multi-Year Cumulative Cash Flow is negative.	See note	50 30 0	0 0	
Notes	Multi-Year Cumulative Cash Flow is negative and Cash Flow is negative each year.				

FINANCIAL

Measure 2d	Debt Service Coverage Ratio: $(\text{Net Income} + \text{Depreciation} + \text{Interest Expense}) / (\text{Annual Principal, Interest, and Lease Payments})$	Result	Points Possible	Points Earned
Debt Service Coverage Ratio	<p>Meets Standard: Debt Service Coverage Ratio is equal to or exceeds 1.1</p> <p>Does Not Meet: Debt Service Coverage Ratio is less than 1.1</p>	0.65	50	0
Notes	<p>1. Due to the final payment on the building loan in FY 2018, the debt service coverage was less than 1.1. We expect that this measure will meet standard in future years because there will no longer be debt to service. 2. Due to the Reinstatement of Pension Liability, as required by GASB 68, Net Position may be higher than expected. Changes in Net Position due to pension reinstatement that do not provide or require current financial resources have been removed from the Net Position calculation. This reinstatement had no material effect on the outcome for this measure.</p>			0

Heritage Academy Longitudinal Results

		Percentage of Points Earned					
ACADEMIC	Measure	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22
State Proficiency Comparison	1a						
	1b						
District Proficiency Comparison	2a						
	2b						
Criterion-Referenced Growth	3a						
	3b						

% of Possible Academic Points for this School

18% 14%

		Percentage of Points Earned					
OPERATIONAL	Measure	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22
Educational Program	1a -1d	90%	100%				
Financial Management	2a - 2c	100%	67%				
Governance & Reporting	3a - 3f	93%	100%				
School Environment	4a - 4b	100%	100%				
Additional Obligations	5a	100%	100%				

% of Possible Operational Points for this School

95% 94%

		Percentage of Points Earned					
FINANCIAL	Measure	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22
Near-Term	1a - 1d	55%	50%				
Sustainability	2a - 2d	75%	50%				

% of Possible Financial Points for this School

65% 50%

ACCOUNTABILITY DESIGNATION		2016-17	2017-18	2018-19	2019-20	2020-21	2021-22
Academic		Critical	Critical				
Mission Specific		N/A	N/A				
Operational		Honor	Honor				
Financial		Good Standing	Remediation				