

Heritage Elementary School—Entity ID 81076

Schools: Heritage Elementary School and Heritage Elementary—Williams

Renewal Executive Summary

I. Performance Summary

Renewal application requirements are based upon the Charter Holder’s past performance as measured by the Board’s Academic, Financial, and Operational¹ Performance Frameworks. The table below identifies areas for which the Charter Holder demonstrated acceptable performance. For “Not Acceptable” academic and financial performance, the Charter Holder was required to submit additional information as part of the renewal application.

Area	Acceptable	Not Acceptable
Academic Framework	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Financial Framework	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Operational Framework	<input checked="" type="checkbox"/>	<input type="checkbox"/>

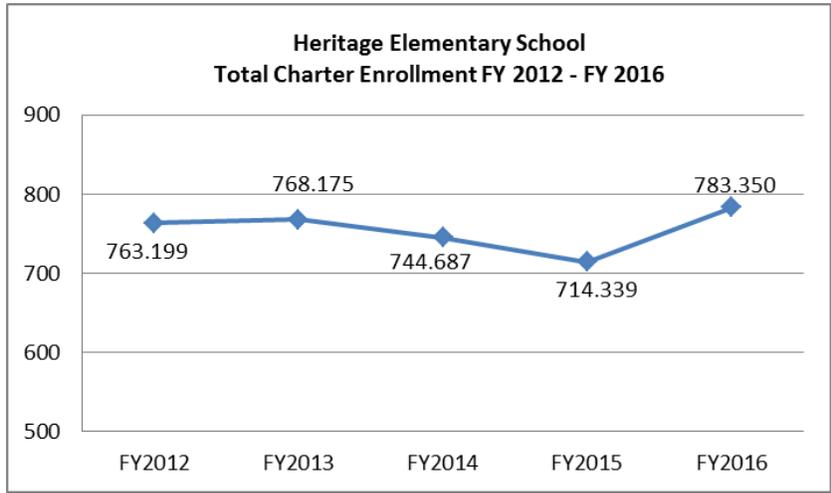
During the five-year interval review of the charter, Heritage Elementary School was required to submit a Performance Management Plan (PMP) as an intervention because the schools operated by the Charter Holder, Heritage Elementary School and Heritage Elementary—Williams did not meet the academic expectations set forth by the Board. At the time Heritage Elementary School became eligible to apply for renewal, the Charter Holder did not meet the Academic Performance Expectations of the Board as set forth in the Performance Framework and was required to submit a Demonstration of Sufficient Progress (DSP) as part of the renewal application package. The Charter Holder was unable to demonstrate that the two schools are making sufficient progress toward the Board’s expectations through the submission of the required information or evidence reviewed during an on-site visit. In the most recent fiscal year for which an academic dashboard is available, Heritage Elementary School and Heritage Elementary—Williams received overall ratings of “Does Not Meet” the Board’s academic standards.

II. Profile

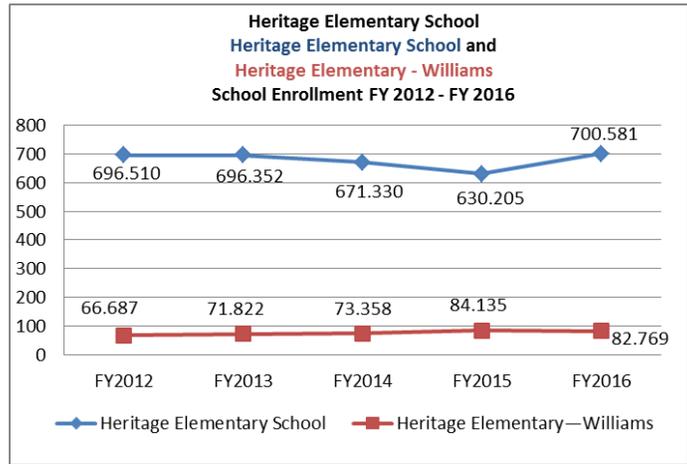
Heritage Elementary School operates two schools serving grades K–8, Heritage Elementary School (HES) in Glendale and Heritage Elementary—Williams in Williams. The graph below shows the Charter Holder’s actual 100th day average daily membership (ADM) for fiscal years 2012–2016.

¹ The Operational Performance Framework does not require additional submissions for charter holders that have “Not Acceptable” operational performance.





The graph below shows the Charter Holder’s actual 100th day ADM for fiscal years 2012–2016 by school site.



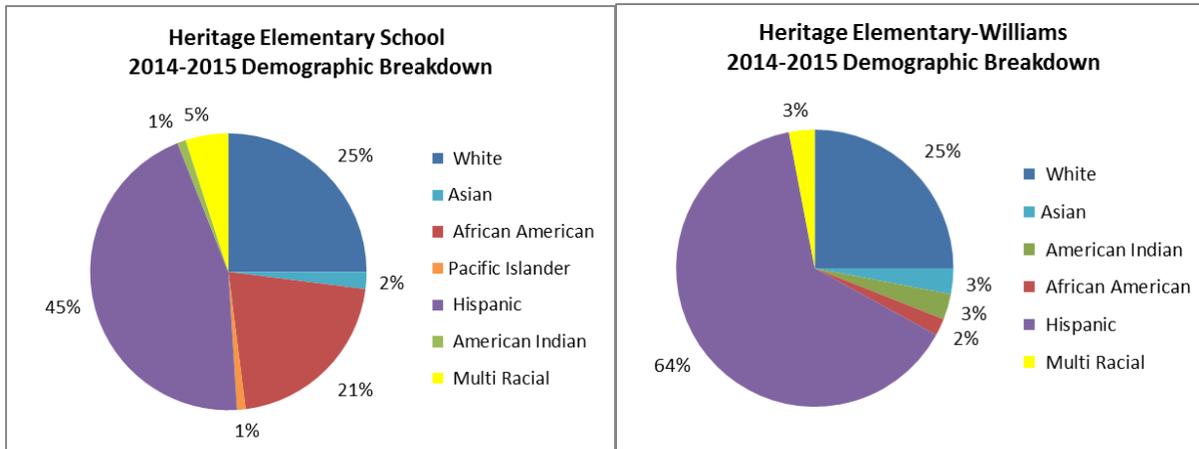
The academic performance of Heritage Elementary School and Heritage Elementary—Williams is represented in the table below. Academic Dashboards for each school can be seen in Appendix: B. Academic Dashboards.

School Name	Opened	Current Grades Served	2012 Overall Rating	2013 Overall Rating	2014 Overall Rating
Heritage Elementary School	07/22/2002	K-8	46.88/ D	41.25/D	62.50/B
Heritage Elementary—Williams	07/01/2007	K-8	45.63/ D	60/ B	57.50/B

The demographic data for Heritage Elementary School and Heritage Elementary-Williams from the 2014–2015 school year is represented in the charts below.²

² Information provided by the Research and Evaluation Division of the ADE. ASBCS, June 13, 2016





The percentage of students who were eligible for Free and Reduced Lunch, classified as English Language Learners, and classified as students with disabilities in the 2014-2015 school year is represented in the table below.³

School Name	Category		
	Free and Reduced Lunch	English Language Learners	Special Education
Heritage Elementary School	71%	4%	9%
Heritage Elementary—Williams	74%	31%	8%

Heritage Elementary School has not been brought before the Board for any items or actions in the past 12 months.

III. Additional School Choices

Heritage Elementary School received a letter grade of B and an overall rating of “Does Not Meet” on the Board’s academic performance standard for FY 2014. The school site is located in Glendale near West Glendale Avenue and North El Mirage Road. The following information identifies additional schools within a five mile radius of the school and the academic performance of those schools.

There are 25 schools serving grades K–8 within a five mile radius of Heritage Elementary School that received an A–F letter grade. The table below provides a breakdown of those schools. Schools are grouped by the A–F letter grade assigned by the ADE. For each letter grade, the table identifies the number of schools assigned that letter grade, the number of schools that scored above the state average on AzMERIT in English Language Arts and Math in FY 2015, the number of schools with AzMERIT scores comparable to those of Heritage Elementary School, the number of those schools that are charter schools, and the number of the charter schools that are meeting the Board’s academic performance standard for FY 2014.

³ Information provided by the Research and Evaluation Division of the ADE. If the percentage of students in a non-ethnicity-based demographic group is not reported to ADE, or is 0% or 100%, the percentage for that demographic group is redacted.



Heritage Elementary School				ELA 29%	Math 31%		
Letter Grade	Within 5 miles	Above State Average ELA (35%)	Above State Average Math (35%)	Comparable ELA ($\pm 5\%$)	Comparable Math ($\pm 5\%$)	Charter Schools	Meets Board's Standard
A	7	6	6	1	1	1	1
B	17	7	6	8	10	1	1
C	1	0	0	1	1	0	0

The table below presents the number of schools, sorted by FY 2014 letter grade, within a five mile radius of Heritage Elementary School serving a comparable percentage of students ($\pm 5\%$) in the identified subgroups.⁴

Heritage Elementary School	71%	4%	9%
Letter Grade	Comparable FRL ($\pm 5\%$)	Comparable ELL ($\pm 5\%$)	Comparable SPED ($\pm 5\%$)
A	1	6	5
B	2	16	14
C	0	1	1

Heritage Elementary – Williams received a letter grade of B and an overall rating of “Does Not Meet” on the Board’s academic performance standard for FY 2014. The school site is located in Williams near Airport Road and Interstate 40. The following information identifies additional schools within a five mile radius of the school and the academic performance of those schools.

There is one school serving grades K–8 within a five mile radius of Heritage Elementary—Williams that received an A–F letter grade. The table below provides a comparison of the letter grade and AzMERIT scores of Heritage Elementary—Williams and the nearby school, which is not a charter school. Neither school performed above the state average in ELA or Math on AzMERIT.

School	Letter Grade	AzMERIT ELA Score	AzMERIT Math Score
Heritage Elementary—Williams	B	23%	25%
Williams Elementary/Middle School	D	17%	15%

The school within a five mile radius of Heritage Elementary—Williams does not serve a comparable FRL, ELL, or SPED population.

IV. Success of the Academic Program

The following is a timeline of activities that have occurred related to the academic performance of Heritage Elementary School:

February 2013: The Board released FY 2012 Academic Dashboards; Heritage Elementary School and Heritage Elementary—Williams both received overall ratings of “Does Not Meet” the Board’s academic

⁴ Information provided by the Research and Evaluation Division of the ADE. If the percentage of students in a non-ethnicity-based demographic group is not reported to ADE, or is 0% or 100%, the percentage for that demographic group is redacted. ASBCS, June 13, 2016



standards and Heritage Elementary School did not meet the Board’s Academic Performance Expectations.

March 2013: Heritage Elementary School was notified that the Charter Holder was required to submit a PMP on or before April 19, 2013 for the five-year interval review because Heritage Elementary School and Heritage Elementary—Williams, the schools operated by the Charter Holder, did not meet the Academic Expectations set forth by the Board.

April 2013: Heritage Elementary School timely submitted a PMP.

October 2013: The Board released FY 2013 Academic Dashboards; Heritage Elementary School and Heritage Elementary—Williams received overall ratings of “Does Not Meet” the Board’s academic standards. Therefore, Heritage Elementary School did not meet the Board’s Academic Performance Expectations. The Charter Holder was assigned a DSP as required information for an expansion request.

February 2014: Following a preliminary evaluation of the FY 2014 DSP, Board staff conducted a site visit on February 24, 2014 to meet with the school’s leadership and review all evidence provided by the Charter Holder.

March 2014: Board staff completed a final evaluation of the Charter Holder’s FY 2014 DSP and made the evaluation available to the Charter Holder. In that final evaluation of the FY 2014 DSP, Board staff determined that the Charter Holder’s Demonstration of Sufficient Progress was acceptable in all areas. The findings contained in the final evaluation of the FY 2014 DSP were grounded in a limited evaluation of the school’s evidence as compared to the evaluation used in completing the final evaluation of the FY 2016 DSP submitted as part of the renewal application package.

October 2014: The Board released FY 2014 Academic Dashboards; Heritage Elementary School and Heritage Elementary—Williams received overall ratings of “Does Not Meet” the Board’s academic standards. Therefore, Heritage Elementary School did not meet the Board’s Academic Performance Expectations. The Charter Holder was assigned a DSP as part of an annual reporting requirement.

May 2015: Board staff completed a final evaluation of the Charter Holder’s FY 2015 DSP and made the evaluation available to the Charter Holder. In that final evaluation of the FY 2015 DSP, Board staff determined that the Charter Holder’s DSP was not acceptable in all areas. In areas that were evaluated as not acceptable, Board staff provided the Charter Holder with technical guidance.

January 2016: Board staff provided the Charter Holder, through its charter representative, Raena Janes, with Renewal Notification Information, which included notification of the renewal process, the date on which the Charter Holder would become eligible to apply for renewal (January 21, 2016), the deadline date on which the renewal application package would be due to the Board (April 21, 2016), information on the availability of the Charter Holder’s renewal application as well as instruction on how to access the renewal application, and notification of the requirement to submit a DSP as a component of its renewal application package because the Charter Holder did not meet the Academic Performance Expectations set forth by the Board.

V. Demonstration of Sufficient Progress

A renewal application package with a Renewal DSP for Heritage Elementary School (Appendix: E. Renewal DSP Submission) was timely submitted by the Charter Representative on April 21, 2016. The Charter Holder was provided a copy of the initial evaluation of the DSP Report prior to the site visit and informed that areas initially evaluated as not acceptable must be addressed with additional evidence and documentation at the time of the visit.



Following a preliminary evaluation of the DSP, staff conducted a site visit to meet with the school’s leadership, as selected by the school, to confirm evidence of the processes described in the DSP and review additional evidence to be considered in the final evaluation of the Charter Holder’s DSP submission. The following representatives of Heritage Elementary School were present at the site visit:

Name	Role
Ana P. Gonzalez-Willis	Special Education Director
Viridiana R. Gonzalez	ELL District Coordinator
Melissa N. Campbell	ELL Site Coordinator
Jackie Trujillo	Superintendent
Raena Janes	Director
Justin Dye	Principal (Heritage Glendale)
Sonia Camilli	Vice Principal K–5
Kris Johnson	Director of Federal Programs
Alicia Perez	Vice Principal 6–8; Title I Director
Kaytie Thies	Principal (Heritage Williams)

At the site visit, Board staff completed a document inventory for all evidence presented by the Charter Holder (Appendix: D. Renewal DSP Site Visit Inventory Forms). The Charter Holder was provided a copy of the document inventory at the end of the site visit. Following the site visit, Board staff completed a final evaluation of the DSP (Appendix: C. Renewal DSP Final Evaluation). The following is a summary of the final DSP Evaluation:

Evaluation Summary			
Area	DSP Evaluation		
	Meets	Does Not Meet	Falls Far Below
Data	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Curriculum	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assessment	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Monitoring Instruction	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Professional Development	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

After considering information in the DSP Report and evidence provided at the time of the site visit, the Charter Holder did demonstrate evidence of a sustained improvement plan that includes implementation of a comprehensive curriculum system, a comprehensive assessment system, a comprehensive instructional monitoring system, and a comprehensive professional development system. However, the data provided by the Charter Holder failed to show improvement year-over-year for the two most recent school years, and demonstrated declines in academic performance, in 4 out of the 12 measures required by the Board for Heritage Elementary School, and 4 out of the 11 measures required by the Board for Heritage Elementary—Williams.

Based on the findings summarized above and described in Appendix D. Renewal DSP Site Visit Inventory Forms, staff determined that the Charter Holder did not demonstrate sufficient progress towards meeting the Board’s Academic Performance Expectations.



VI. Viability of the Organization

The Charter Holder submitted consolidated financial statements, which included financial information for two entities. In accordance with the Board's performance framework, if the Charter Holder, the consolidated entity, or both do not meet the Board's Financial Performance Expectations, then a financial performance response must be submitted. Based on the fiscal years 2014 and 2015 audits, the consolidated entity meets the Board's Financial Performance Expectations, but the Charter Holder did not meet the Board's Financial Performance Expectations. Therefore, a Financial Performance Response was required. The table below includes the Charter Holder's financial data and financial performance for the last three audited fiscal years.

Financial Data				
Statement of Financial Position	2015	2014	2013	2012
Cash	\$534,070	\$409,541	\$327,672	\$394,759
Unrestricted Cash	\$320,245	\$38,764	\$13,869	
Other Liquidity	-	-	-	
Total Assets	\$11,220,563	\$17,693,924	\$18,548,881	
Total Liabilities	\$17,705,864	\$23,605,753	\$23,580,448	
Current Portion of Long-Term Debt & Capital Leases	\$336,200	\$472,862	\$493,000	
Net Assets	(\$6,485,300)	(\$5,911,829)	(\$5,031,567)	
Statement of Activities	2015	2014	2013	
Revenue	\$5,162,586	\$5,749,045	\$6,125,028	
Expenses	\$5,736,058	\$6,629,307	\$7,350,251	
Net Income	(\$573,472)	(\$880,262)	(\$1,225,223)	
Change in Net Assets	(\$573,472)	(\$880,262)	(\$1,225,223)	
Financial Statements or Notes	2015	2014	2013	
Depreciation & Amortization Expense	\$585,503	\$637,630	\$625,140	
Interest Expense	\$902,828	\$1,352,000	\$1,390,000	
Lease Expense	-	-	-	
Financial Performance				
	2015	2014	2013	3-yr Cumulative
Near-Term Indicators				
Going Concern	No	No	No	N/A
Unrestricted Days Liquidity	20.38	2.13	0.69	N/A
Default	No	No	No	N/A
Sustainability Indicators				
Net Income	(\$573,472)	(\$880,262)	(\$1,225,223)	N/A
Cash Flow	\$124,529	\$81,869	(\$67,087)	\$139,311
Fixed Charge Coverage Ratio	0.74	0.61	0.42	N/A



The Charter Holder's Financial Performance Response has been provided in the meeting materials (Appendix: G. Supplemented Financial Response).⁵ Staff's final evaluation of the Financial Performance Response resulted in three "Acceptable" and zero "Not Acceptable" determinations (Appendix: F. Financial Response Evaluation). An analysis of the Charter Holder's financial performance, focusing on those measures where the Charter Holder failed to meet the Board's target and using information from the Charter Holder's Financial Performance Response and related documents, is provided below.

Unrestricted Days Liquidity

The Charter Holder explained, "Year after year decreases in Net Assets as described above had direct and cumulative affect on the Charter Holder's cash position as of 6/30/2015. The decrease in Net Assets reduced/eliminated any Cash that would have otherwise been generated from operating activities, which in turn made securing third party/outside short term financing impossible." Based on the projected cash flow statement, the Charter Holder anticipates having more than 30 days liquidity at June 30, 2016.

Net Income

Between 2011 and 2015, the Charter Holder's average daily membership (ADM) and total revenues declined by approximately 350 and \$3 million, respectively. The Charter Holder indicated it "should have acted with more urgency to reduce expenses", but did not "significantly respond" to the year after year decreases in enrollment until 2015. From 2014 to 2015, the Charter Holder reduced overall per pupil expenditures by \$872 and per pupil fixed costs and personnel expenditures by \$676 and \$368, respectively.

For 2016, the Charter Holder projects a net loss, although a smaller net loss than in 2015. Beginning in 2017, the Charter Holder anticipates positive net income. The 2017 projection depends on the Charter Holder increasing its ADM by 42 from 2016. Based on the Charter Holder's enrollment numbers and trends, the ADM increase appears to be attainable.

Fixed Charge Coverage Ratio (FCCR)

The magnitude of the net loss affected the Charter Holder's performance in 2015. For 2016, the Charter Holder projects meeting the Board's FCCR target.

VII. Adherence to the Terms of the Charter

For fiscal year 2015, the Charter Holder meets the Board's Operational Performance Standard set forth in the Performance Framework adopted by the Board and, to date, has no measures rated as "Falls Far Below Standard" for the current fiscal year (Appendix: A. Renewal Summary Review).

⁵ On May 9, 2016, Board staff emailed a copy of staff's initial evaluation and provided a deadline by which the Charter Holder could supplement its Financial Performance Response to address areas evaluated as "Not Acceptable". By the deadline, the Charter Holder submitted supplemental information.



VIII. Board Options

Option 1: The Board may approve the renewal. The following language is provided for consideration:

Renewal is based on consideration of academic, fiscal and contractual compliance of the Charter Holder. The Board has reviewed the Charter Holder's failure to meet the Board's financial expectations. With that taken into consideration as well as all information provided to the Board for consideration of this renewal application package and during its discussion with representatives of the Charter Holder, I move to approve the request for charter renewal and grant a renewal contract to Heritage Elementary School.

Option 2: The Board may deny the renewal. The following language is provided for consideration:

Based upon a review of the information provided by the representatives of the Charter Holder and the contents of the application package which includes the academic performance, the fiscal compliance, and legal and contractual compliance of the Charter Holder over the charter term, I move to deny the request for charter renewal and to not grant a renewal contract for Heritage Elementary School. Specifically, the Charter Holder, during the term of the contract, failed to meet the obligations of the contract or failed to comply with state law when it: (Board member must specify reasons the Board found during its consideration.)



APPENDIX A
RENEWAL SUMMARY REVIEW

Five-Year Interval Report

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ARIZONA STATE BOARD FOR CHARTER SCHOOLS

Renewal Summary Review

Interval Report Details

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Report Date: 05/11/2016 Report Type: Renewal

Charter Contract Information

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Charter Corporate Name: Heritage Elementary School

Charter CTDS: 07-89-85-000 Charter Entity ID: 81076

Charter Status: Open Contract Effective Date: 07/22/2002

Number of Schools: 2 Contractual Days:

- Heritage Elementary - Williams: 183
- Heritage Elementary School: 180

Charter Grade Configuration: K-8

FY Charter Opened: 2003 Contract Expiration Date: 07/21/2017

Charter Granted: 10/09/2001 Charter Signed: 07/22/2002

Corp. Type: Non Profit Charter Enrollment Cap: 1650

Charter Contact Information

[Hide Section](#)

Mailing Address: 5704 East Grant Road
Tucson, AZ 85712 Website: —

Phone: 623-297-0467 Fax: 602-353-9270

Mission Statement: The mission of Heritage Elementary School is to impart the best in traditional education set in the technology of the day. Heritage will prepare students with phonics reading skills, critical thinking skills, analytical reasoning skills and the ability to become life long learners and productive citizens in a world of diverse cultures.

Charter Representatives: Name: Email: FCC Expiration Date:

1.) Ms. Raena Janes rj@arizonacharterschools.org —

Academic Performance - Heritage Elementary - Williams

[Hide Section](#)

School Name: Heritage Elementary - Williams School CTDS: 07-89-85-103

School Entity ID: 89624 Charter Entity ID: 81076

School Status: Open School Open Date: 07/01/2007

Physical Address: 790 East Rodeo Road
Williams, AZ 86046 Website: —

Phone: 928-635-3998 Fax: 928-635-3999

Grade Levels Served: K-8 FY 2014 100th Day ADM: 73.358

Academic Performance Per Fiscal Year

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Heritage Elementary - Williams

	2012 Small Elementary School (K-7)			2013 Small Elementary School (K to 7)			2014 Traditional Elementary School (K to 7)		
	Measure	Points	Weight	Measure	Points	Weight	Measure	Points	Weight
1. Growth									

		Assigned		Assigned		Assigned		Assigned			
1a. SGP	Math	47	50	12.5	51	75	12.5	64	75	25	
	Reading	34	50	12.5	48	50	12.5	49	50	25	
1b. SGP Bottom 25%	Math	37	50	12.5	49	50	12.5	NR	0	0	
	Reading	22	25	12.5	60.5	75	12.5	NR	0	0	
2. Proficiency		Measure	Points Assigned	Weight	Measure	Points Assigned	Weight	Measure	Points Assigned	Weight	
2a. Percent Passing	Math	29 / 47.9	50	7.5	38.3 / 49.4	50	7.5	48.4 / 64.1	50	7.5	
	Reading	52 / 68.2	50	7.5	67.9 / 73.5	50	7.5	71 / 79.4	50	7.5	
2b. Composite School Comparison	Math	-14.7	50	7.5	-3.9	50	7.5	-9.1	50	7.5	
	Reading	-12.1	50	7.5	2.4	75	7.5	-2.7	50	7.5	
2c. Subgroup ELL	Math	18 / 22.5	50	2.5	18.8 / 22.8	50	2.5	NR	0	0	
	Reading	24 / 35.3	50	2.5	43.8 / 38.8	75	2.5	NR	0	0	
2c. Subgroup FRL	Math	24 / 39.4	50	2.5	34.5 / 43.6	50	2.5	44 / 54.7	50	7.5	
	Reading	53 / 63.1	50	2.5	69 / 69.6	50	2.5	68 / 72.4	50	7.5	
2c. Subgroup SPED	Math	5 / 22.8	50	2.5	6.7 / 27	50	2.5	NR	0	0	
	Reading	21 / 32.2	50	2.5	26.7 / 42.4	50	2.5	NR	0	0	
3. State Accountability		Measure	Points Assigned	Weight	Measure	Points Assigned	Weight	Measure	Points Assigned	Weight	
3a. State Accountability		D	25	5	B	75	5	B	75	5	
Overall Rating		Overall Rating			Overall Rating			Overall Rating			
Scoring for Overall Rating 89 or higher: Exceeds Standard <89, but > or = to 63: Meets Standard <63, but > or = to 39: Does Not Meet Standard Less than 39: Falls Far Below Standard		45.63			100	60			100	57.5	

Academic Performance - Heritage Elementary School

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School Name:	Heritage Elementary School	School CTDS:	07-89-85-101
School Entity ID:	81077	Charter Entity ID:	81076
School Status:	Open	School Open Date:	07/22/2002
Physical Address:	6805 N 125th Ave Glendale, AZ 85307	Website:	—
Phone:	623-742-3956	Fax:	623-742-3957
Grade Levels Served:	K-8	FY 2014 100 th Day ADM:	671.33

Academic Performance Per Fiscal Year

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Heritage Elementary School

		2012 Traditional Elementary School (K-8)			2013 Traditional Elementary School (K to 8)			2014 Traditional Elementary School (K to 8)		
1. Growth		Measure	Points Assigned	Weight	Measure	Points Assigned	Weight	Measure	Points Assigned	Weight
1a. SGP	Math	38	50	12.5	43	50	12.5	62	75	12.5

	Reading	35	50	12.5	36	50	12.5	49	50	12.5
1b. SGP Bottom 25%	Math	40	50	12.5	47.5	50	12.5	65	75	12.5
	Reading	38	50	12.5	41	50	12.5	58	75	12.5
2. Proficiency		Measure	Points Assigned	Weight	Measure	Points Assigned	Weight	Measure	Points Assigned	Weight
2a. Percent Passing	Math	40 / 63.8	50	7.5	42.7 / 64.3	25	7.5	58.8 / 63.5	50	7.5
	Reading	64 / 77.4	50	7.5	62.5 / 78.4	25	7.5	68.8 / 78	50	7.5
2b. Composite School Comparison	Math	-22.2	25	7.5	-18.2	25	7.5	-1.1	50	7.5
	Reading	-12.4	50	7.5	-13.7	50	7.5	-6.8	50	7.5
2c. Subgroup ELL	Math	17 / 41.1	50	2.5	20 / 39	50	2.5	50 / 34.9	75	2.5
	Reading	37 / 52.8	50	2.5	30 / 51.5	25	2.5	57.1 / 48.5	75	2.5
2c. Subgroup FRL	Math	36 / 54.3	50	2.5	39.4 / 55.1	25	2.5	59.7 / 53.4	75	2.5
	Reading	60 / 69.7	50	2.5	61 / 71	25	2.5	68.2 / 70	50	2.5
2c. Subgroup SPED	Math	15 / 25.7	50	2.5	11.5 / 25.7	50	2.5	17.4 / 23.9	50	2.5
	Reading	20 / 37.5	50	2.5	23.1 / 37.9	50	2.5	23.9 / 37.6	50	2.5
3. State Accountability		Measure	Points Assigned	Weight	Measure	Points Assigned	Weight	Measure	Points Assigned	Weight
3a. State Accountability		D	25	5	D	25	5	B	75	5
Overall Rating		Overall Rating			Overall Rating			Overall Rating		
Scoring for Overall Rating 89 or higher: Exceeds Standard <89, but > or = to 63: Meets Standard <63, but > or = to 39: Does Not Meet Standard Less than 39: Falls Far Below Standard		46.88			41.25			62.5		

Academic Performance - Heritage Elementary School (MC) (Member Campus)

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School Name:	Heritage Elementary School (MC)	School CTDS:	07-89-85-101
School Entity ID:	81077	Charter Entity ID:	81076
School Status:	Open	School Open Date:	07/22/2002
Physical Address:	6805 N. 125th Ave. Glendale, AZ 85307	Website:	—
Phone:	6239351931	Fax:	623-935-1614
Grade Levels Served:	K-2		

Financial Performance

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Charter Corporate Name:	Heritage Elementary School		
Charter CTDS:	07-89-85-000	Charter Entity ID:	81076
Charter Status:	Open	Contract Effective Date:	07/22/2002

Financial Performance

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Heritage Elementary School

Near-Term Measures	Fiscal Year 2014		Fiscal Year 2015	
	Going Concern	No	Meets	No
Unrestricted Days Liquidity	2.13	Falls Far Below	20.38	Does Not Meet
Default	No	Meets	No	Meets

Sustainability Measures (Negative numbers indicated by parentheses)

Net Income	(\$880,262)	Does Not Meet	(\$573,472)	Does Not Meet
Fixed Charge Coverage Ratio	0.61	Does Not Meet	0.74	Does Not Meet
Cash Flow (3-Year Cumulative)	(\$141,205)	Does Not Meet	\$139,311	Meets

Cash Flow Detail by Fiscal Year

FY 2014	FY 2013	FY 2012	FY 2015	FY 2014	FY 2013
\$81,869	(\$67,087)	(\$155,987)	\$124,529	\$81,869	(\$67,087)

Additional Information

The fiscal years 2014 and 2015 audits include consolidated financial information for two entities, including Heritage Elementary School. The information above reflects the financial performance of Heritage Elementary School. Based on the fiscal years 2014 and 2015 audits, the consolidated entity received a "Does Not Meet" on the Unrestricted Days Liquidity measure [24.12] and meets the Board's financial performance expectations.

Does Not Meet Board's Financial Performance Expectations

Operational Performance

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Charter Corporate Name:	Heritage Elementary School	Charter Entity ID:	81076
Charter CTDS:	07-89-85-000	Contract Effective Date:	07/22/2002
Charter Status:	Open		

Operational Performance

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Click on any of the measures below to see more information.

Measure	2015	2016
1.a. Does the delivery of the education program and operation reflect the essential terms of the educational program as described in the charter contract?	Meets	--
Educational Program - Essential Terms	No issue identified	--
1.b. Does the charter holder adhere with applicable education requirements defined in state and federal law?	Does Not Meet	--
Services to Student with Disabilities	No issue identified	--
Instructional Days/Hours	No issue identified	--
Data for Achievement Profile	No issue identified	--
Mandated Programming (State/Federal Grants)	ADE Monitoring CAP - Federal Title Funds	--
2.a. Do the charter holder's annual audit reporting packages reflect sound operations?	Meets	--
Timely Submission	Yes	Yes
Audit Opinion	Unqualified	Unqualified
Completed 1st Time CAPs	No issue identified	--
Second-Time/Repeat CAP	No issue identified	--
Serious Impact Findings	No issue identified	--

Minimal Impact Findings (3+ Years)	No issue identified	--
2.b. Is the charter holder administering student admission and attendance appropriately?	Meets	--
Estimated Count/Attendance Reporting	No issue identified	--
Tuition and Fees	No issue identified	--
Public School Tax Credits	No issue identified	--
Attendance Records	No issue identified	--
Enrollment Processes	No issue identified	--
2.c. Is the charter holder maintaining a safe environment consistent with state and local requirements?	Meets	--
Facility/Insurance Documentation	No issue identified	--
Fingerprinting	No issue identified	--
2.d. Is the charter holder transparent in its operations?	Meets	--
Academic Performance Notifications	No issue identified	--
Teacher Resumes	No issue identified	--
Open Meeting Law	No issue identified	--
Board Alignment	No issue identified	--
2.e. Is the charter holder complying with its obligations to the Board?	Meets	--
Timely Submissions	No issue identified	Complaint Response
Limited Substantiated Complaints	No issue identified	--
Favorable Board Actions	No issue identified	--
2.f. Is the charter holder complying with reporting requirements of other entities to which the charter holder is accountable?	Does Not Meet	--
Arizona Corporation Commission	No issue identified	--
Arizona Department of Economic Security	No issue identified	--
Arizona Department of Education	Annual Financial Report (AFR)	--
Arizona Department of Revenue	No issue identified	--
Arizona State Retirement System	No issue identified	--
Equal Employment Opportunity Commission	No issue identified	--
Industrial Commission of Arizona	No issue identified	--
Internal Revenue Service	No issue identified	--
U.S. Department of Education	No issue identified	--
3. Is the charter holder complying with all other obligations?	Meets	--
Judgments/Court Orders	No issue identified	--
Other Obligations	No issue identified	--
OVERALL RATING	Meets Operational Standard	--

Last Updated: 2016-04-01 10:52:57

APPENDIX B
ACADEMIC DASHBOARDS

Academic Performance

[Edit this section.](#)

Heritage Elementary School

		2012 Traditional Elementary School (K-8)			2013 Traditional Elementary School (K to 8)			2014 Traditional Elementary School (K to 8)			
		Measure	Points Assigned	Weight	Measure	Points Assigned	Weight	Measure	Points Assigned	Weight	
1. Growth											
1a. SGP	Math	38	50	12.5	43	50	12.5	62	75	12.5	
	Reading	35	50	12.5	36	50	12.5	49	50	12.5	
1b. SGP Bottom 25%	Math	40	50	12.5	47.5	50	12.5	65	75	12.5	
	Reading	38	50	12.5	41	50	12.5	58	75	12.5	
2. Proficiency											
2a. Percent Passing	Math	40 / 63.8	50	7.5	42.7 / 64.3	25	7.5	58.8 / 63.5	50	7.5	
	Reading	64 / 77.4	50	7.5	62.5 / 78.4	25	7.5	68.8 / 78	50	7.5	
2b. Composite School Comparison	Math	-22.2	25	7.5	-18.2	25	7.5	-1.1	50	7.5	
	Reading	-12.4	50	7.5	-13.7	50	7.5	-6.8	50	7.5	
2c. Subgroup ELL	Math	17 / 41.1	50	2.5	20 / 39	50	2.5	50 / 34.9	75	2.5	
	Reading	37 / 52.8	50	2.5	30 / 51.5	25	2.5	57.1 / 48.5	75	2.5	
2c. Subgroup FRL	Math	36 / 54.3	50	2.5	39.4 / 55.1	25	2.5	59.7 / 53.4	75	2.5	
	Reading	60 / 69.7	50	2.5	61 / 71	25	2.5	68.2 / 70	50	2.5	
2c. Subgroup SPED	Math	15 / 25.7	50	2.5	11.5 / 25.7	50	2.5	17.4 / 23.9	50	2.5	
	Reading	20 / 37.5	50	2.5	23.1 / 37.9	50	2.5	23.9 / 37.6	50	2.5	
3. State Accountability		Measure	Points Assigned	Weight	Measure	Points Assigned	Weight	Measure	Points Assigned	Weight	
3a. State Accountability		D	25	5	D	25	5	B	75	5	
Overall Rating		Overall Rating			Overall Rating			Overall Rating			
Scoring for Overall Rating 89 or higher: Exceeds Standard <89, but > or = to 63: Meets Standard <63, but > or = to 39: Does Not Meet Standard Less than 39: Falls Far Below Standard		46.88			100	41.25			100	62.5	

Academic Performance

[Edit this section.](#)

Heritage Elementary - Williams

		2012 Small Elementary School (K-7)			2013 Small Elementary School (K to 7)			2014 Traditional Elementary School (K to 7)		
		Measure	Points Assigned	Weight	Measure	Points Assigned	Weight	Measure	Points Assigned	Weight
1. Growth										
1a. SGP	Math	47	50	12.5	51	75	12.5	64	75	25
	Reading	34	50	12.5	48	50	12.5	49	50	25
1b. SGP Bottom 25%	Math	37	50	12.5	49	50	12.5	NR	0	0
	Reading	22	25	12.5	60.5	75	12.5	NR	0	0
2. Proficiency										
2a. Percent Passing	Math	29 / 47.9	50	7.5	38.3 / 49.4	50	7.5	48.4 / 64.1	50	7.5
	Reading	52 / 68.2	50	7.5	67.9 / 73.5	50	7.5	71 / 79.4	50	7.5
2b. Composite School Comparison	Math	-14.7	50	7.5	-3.9	50	7.5	-9.1	50	7.5
	Reading	-12.1	50	7.5	2.4	75	7.5	-2.7	50	7.5
2c. Subgroup ELL	Math	18 / 22.5	50	2.5	18.8 / 22.8	50	2.5	NR	0	0
	Reading	24 / 35.3	50	2.5	43.8 / 38.8	75	2.5	NR	0	0
2c. Subgroup FRL	Math	24 / 39.4	50	2.5	34.5 / 43.6	50	2.5	44 / 54.7	50	7.5
	Reading	53 / 63.1	50	2.5	69 / 69.6	50	2.5	68 / 72.4	50	7.5
2c. Subgroup SPED	Math	5 / 22.8	50	2.5	6.7 / 27	50	2.5	NR	0	0
	Reading	21 / 32.2	50	2.5	26.7 / 42.4	50	2.5	NR	0	0
3. State Accountability		Measure	Points Assigned	Weight	Measure	Points Assigned	Weight	Measure	Points Assigned	Weight
3a. State Accountability		D	25	5	B	75	5	B	75	5
Overall Rating		Overall Rating			Overall Rating			Overall Rating		
Scoring for Overall Rating 89 or higher: Exceeds Standard <89, but > or = to 63: Meets Standard <63, but > or = to 39: Does Not Meet Standard Less than 39: Falls Far Below Standard		45.63			60			57.5		
		100			100			100		

APPENDIX C
RENEWAL DSP FINAL EVALUATION

Demonstration of Sufficient Progress Final Evaluation

CHARTER INFORMATION

Charter Holder Name	Heritage Elementary School Schools	Heritage Elementary School Heritage Elementary - Williams
Charter Holder Entity ID	81076	Purpose of DSP Submission
Site Visit Date	May 16, 2016	Renewal

Evaluation Overview:

The following serves as an evaluation of the Demonstration of Sufficient Progress process and includes:

- An overall rating for each area of Data, Curriculum, Assessment, Monitoring Instruction, and Professional Development.
 - Whether questions were sufficiently answered at the site visit
 - Whether documents provided by the Charter Holder serve as sufficient evidence of implementation of described processes

Data

The area of Data is evaluated as Falls Far Below. As evidenced at the DSP site visit, the data provided by the Charter Holder failed to show improvement year-over-year for the two most recent school years, and demonstrated declines in academic performance, in 4 out of the 12 measures required by the Board for Heritage Elementary School and 4 out of the 11 measures required by the Board for Heritage Elementary—Williams. For more detailed analysis see Data Inventory (appendix: D. Renewal DSP Site Visit Inventory Forms, i. Site Visit Inventory – [Data](#)).

School Name: Heritage Elementary School					
Assessment Measure	Data Required	Comparative Data Provided	Data Shows Improvement	Sufficient explanation of HOW data was analyzed	Sufficient explanation of what conclusions were drawn
1a. Student Median Growth Percentile (SGP) – Math	Yes	Yes	Yes	Yes	Yes
1a. Student Median Growth Percentile (SGP) – Reading	Yes	Yes	No	Yes	Yes
1b. SGP Bottom 25% – Math	Yes	Yes	Yes	Yes	Yes
1b. SGP Bottom 25% – Reading	Yes	Yes	No	Yes	Yes
2a. Percent Passing – Math	Yes	Yes	Yes	Yes	Yes
2a. Percent Passing – Reading	Yes	Yes	Yes	Yes	Yes
2c. Subgroup, ELL – Math	Yes	Yes	Yes	Yes	Yes
2c. Subgroup, ELL – Reading	Yes	Yes	Yes	Yes	Yes
2c. Subgroup, FRL – Math	Yes	Yes	Yes	Yes	Yes
2c. Subgroup, FRL – Reading	Yes	Yes	Yes	Yes	Yes
2c. Subgroup, students with disabilities – Math	Yes	Yes	No	Yes	Yes
2c. Subgroup, students with disabilities – Reading	Yes	Yes	No	Yes	Yes

School Name: Heritage Elementary – Williams					
Assessment Measure	Data Required	Comparative Data Provided	Data Shows Improvement	Sufficient explanation of HOW data was analyzed	Sufficient explanation of what conclusions were drawn
1a. Student Median Growth Percentile (SGP) – Math	No	N/A	N/A	N/A	N/A
1a. Student Median Growth Percentile (SGP) – Reading	Yes	Yes	No	Yes	Yes
1b. SGP Bottom 25% – Math	Yes	Yes	Yes	Yes	Yes
1b. SGP Bottom 25% – Reading	Yes	Yes	No	Yes	Yes
2a. Percent Passing – Math	Yes	Yes	Yes	Yes	Yes
2a. Percent Passing – Reading	Yes	Yes	No	Yes	Yes
2c. Subgroup, ELL – Math	Yes	Yes	Yes	Yes	Yes
2c. Subgroup, ELL – Reading	Yes	Yes	Yes	Yes	Yes
2c. Subgroup, FRL – Math	Yes	Yes	Yes	Yes	Yes
2c. Subgroup, FRL – Reading	Yes	Yes	No	Yes	Yes
2c. Subgroup, students with disabilities – Math	Yes	Yes	Yes	Yes	Yes
2c. Subgroup, students with disabilities – Reading	Yes	Yes	Yes	Yes	Yes

Curriculum: *The area of Curriculum is evaluated as Meets.*

As demonstrated by the evidence provided at the DSP site visit, the Charter Holder has consistently implemented a comprehensive curriculum system that addresses each of the required elements.

For more detailed analysis see Curriculum Inventory (appendix: D. Renewal DSP Site Visit Inventory Forms, ii. Site Visit Inventory – Curriculum).

Question	Sufficient Evidence	Site Visit Inventory Item
A. Evaluating Curriculum		
What ongoing process does the Charter Holder use to evaluate curriculum? What criteria guide that process?	YES	C.A.1
What ongoing process does the Charter Holder use to evaluate how effectively the curriculum enables students to meet all standards ? What criteria guide that process?	YES	C.A.2
What ongoing process does the Charter Holder use to identify curricular gaps ? What criteria guide that process?	YES	C.A.3
B. Adopting Curriculum		
After curriculum is evaluated, what process does the Charter Holder use to determine if new and/or supplemental curriculum needs to be adopted? What criteria guide that process?	YES	C.B.1
Once the Charter Holder has chosen to adopt new and/or supplemental curriculum , how has the Charter Holder evaluated curriculum options? What criteria guide that process?	YES	C.B.2
C. Revising Curriculum		
After curriculum is evaluated, what process does the Charter Holder use to determine if curriculum must be revised? What criteria guide that process?	YES	C.C.1
Once determined that curriculum must be revised, what process does the Charter Holder use to revise the curriculum? What criteria guide that process?	YES	C.C.2
D. Implementing Curriculum		
What ongoing process does the Charter Holder use to ensure curriculum is implemented with fidelity ? How have these expectations been communicated to instructional staff?	YES	C.D.1
What is the Charter Holder’s ongoing process to ensure consistent use of curricular tools ? How have these expectations been communicated to instructional staff?	YES	C.D.2
What process does the Charter Holder use to ensure that all grade-level standards are taught to mastery within the academic year?	YES	C.D.3
E. Alignment of Curriculum		
What process does the Charter Holder use to verify that the curriculum is aligned to Arizona’s College and Career Ready Standards?	YES	C.E.1
When adopting or revising curriculum, what process does the Charter Holder use to monitor and evaluate changes to ensure that curriculum maintains alignment to Arizona’s College and Career Ready Standards?	YES	C.E.2
F. Adapted to Meet the Needs of Subgroups		
How does the Charter Holder assess each subgroup to determine effectiveness of supplemental and/or differentiated instruction and curriculum?	YES	C.F.1

Assessment: *The area of Assessment is evaluated as Meets.*

As demonstrated by the evidence provided at the DSP site visit, the Charter Holder has consistently implemented a comprehensive assessment system that addresses each of the required elements.

For more detailed analysis see Assessment Inventory (appendix: D. Renewal DSP Site Visit Inventory Forms, iii. Site Visit Inventory – Assessment).

Question	Sufficient Evidence	Site Visit Inventory Item
A. Developing the Assessment System		
What ongoing process does the Charter Holder use to evaluate assessment tools? What criteria guide that process?	YES	A.A.1
What ongoing process does the Charter Holder use to evaluate how the assessments are aligned to the curriculum? What criteria guide that process?	YES	A.A.2
What is the Charter Holder’s ongoing process to evaluate how the assessments are aligned to the instructional methodology ? What criteria guide that process?	YES	A.A.3
B. Adapted to Meet the Needs of Subgroups		
How does the assessment system assess each subgroup to determine effectiveness of supplemental and/or differentiated instruction and curriculum?	YES	A.B.1
C. Analyzing Assessment Data		
What is the Charter Holder’s ongoing process to collect and analyze each type of assessment data listed in the Assessment System Table in Section A and the Subgroup Assessment Table in Section B?	YES	A.C.1
What is the Charter Holder’s ongoing process to make adjustments to curriculum based on the data analysis? What criteria guide that process?	YES	A.C.2
What is the Charter Holder’s ongoing process to make adjustments to instruction based on the data analysis? What criteria guide that process?	YES	A.C.3

Monitoring Instruction: *The area of Monitoring Instruction is evaluated as Meets.*

As demonstrated by the evidence provided at the DSP site visit, the Charter Holder has consistently implemented a comprehensive instructional monitoring system that addresses each of the following required elements.

For more detailed analysis see Monitoring Instruction Inventory (appendix: D. Renewal DSP Site Visit Inventory Forms, iv. Site Visit Inventory – Monitoring Instruction).

Question	Sufficient Evidence	Site Visit Inventory Item
A. Monitoring Instruction		
What is the Charter Holder’s ongoing process to monitor that the instruction taking place is <ul style="list-style-type: none"> • Aligned with ACCRS standards, • Implemented with fidelity, • Effective throughout the year, and • Addressing the identified needs of students in all four subgroups? 	YES	M.A.1
How is the Charter Holder monitoring instruction to ensure that it is leading all students to mastery of the standards?	YES	M.A.2
B. Evaluating Instructional Practices		
How does the Charter Holder evaluate the instructional practices of all staff?	YES	M.B.1
What is the Charter Holder’s ongoing process to identify the quality of instruction?	YES	M.B.2
How does the evaluation process identify the individual strengths, weaknesses, and needs of instructional staff?	YES	M.B.3
C. Adapted to Meet the Needs of Subgroups		
What is the Charter Holder’s ongoing process to evaluate supplemental instruction targeted to address the needs of students in the following subgroups?	YES	M.C.1
D. Providing Feedback that Develops the Quality of Teaching		
How does the Charter Holder analyze information about strengths, weaknesses, and needs of instructional staff?	YES	M.D.1
How is the analysis used to provide feedback to instructional staff on strengths, weaknesses, and learning needs based on the evaluation of instructional practices?	YES	M.D.2

Professional Development: *The area of Professional Development is evaluated as Meets.*

As demonstrated by the evidence provided at the DSP site visit, the Charter Holder has consistently implemented a comprehensive professional development system that addresses each of the following required elements.

For more detailed analysis see Professional Development Inventory (appendix: D. Renewal DSP Site Visit Inventory Forms, v. Site Visit Inventory – Professional Development).

Question	Sufficient Evidence	Site Visit Inventory Item
A. Development of the Professional Development Plan		
What is the Charter Holder’s ongoing process to determine what professional development topics will be covered throughout the year? What data and analysis is utilized to make those decisions?	YES	P.A.1
What is the Charter Holder’s ongoing process to ensure the professional development plan is aligned with instructional staff learning needs ? What criteria are used to make those determinations?	YES	P.A.2
What is the Charter Holder’s ongoing process to address the areas of high importance in the professional development plan ? How are the areas of high importance determined?	YES	P.A.3
B. Adapted to Meet the Needs of Subgroups		
Identify how the Charter Holder provides professional development to ensure instructional staff is able to address the needs of students in all four subgroups .	YES	P.B.1
C. Supporting High Quality Implementation		
What is the Charter Holder’s ongoing process to provide support to the instructional staff on the high quality implementation of the strategies learned in professional development? What does this support include?	YES	P.C.1
What is the Charter Holder’s ongoing process to identify concrete resources , necessary for high quality implementation, for instructional staff?	YES	P.C.2
D. Monitoring Implementation		
What is the Charter Holder’s ongoing process to monitor the implementation of the strategies learned in professional development sessions?	YES	P.D.1
How does the Charter Holder follow-up with instructional staff regarding implementation of the strategies learned in professional development?	YES	P.D.2

APPENDIX D
RENEWAL DSP SITE VISIT
INVENTORY FORMS



Demonstration of Sufficient Progress Site Visit Inventory

Charter Holder Name: Heritage Elementary School
 School Name: Heritage Elementary School
 Site Visit Date: May 16, 2016

Required for: Renewal
 Evaluation Criteria Area: Data

Document Name/Identification	Intended Purpose and Discussion Outcome	
<p>[D.1]</p> <p>2014-2015 Galileo Student Growth and Achievement Reports for grades 2-8</p> <p>2015-2016 Galileo Student Growth and Achievement Reports for grades 2-8</p>	<p>Charter holder indicated the intended purpose of the document was to demonstrate: improved academic performance in Student Median Growth Percentile (SGP) - Math</p> <p>The documents provided demonstrate evidence of improved academic performance in Student Median Growth Percentile (SGP) – Math.</p> <p>Galileo Student Growth and Achievement reports show that in FY 2015, 58% of students were demonstrating expected growth. In FY 2016, this increased to 70% of students. This demonstrates a year over year improvement of 12 percentage points.</p> <p>Final Evaluation:</p>	
	<input checked="" type="checkbox"/> Data presented serve as evidence of improved academic performance, and thus is evaluated as sufficient.	<input type="checkbox"/> Data presented does not serve as evidence of improved academic performance, and thus is evaluated as insufficient.
<p>[D.2]</p> <p>2014-2015 Galileo Student Growth and Achievement Reports for grades 2-8</p> <p>2015-2016 Galileo Student Growth and Achievement Reports for grades 2-8</p>	<p>Charter holder indicated the intended purpose of the document was to demonstrate: improved academic performance in Student Median Growth Percentile (SGP) - Reading</p> <p>The documents provided DO NOT demonstrate evidence of improved academic performance in Student Median Growth Percentile (SGP) – Reading.</p> <p>Galileo Student Growth and Achievement reports show that in FY 2015, 66% of students were demonstrating expected growth. In FY 2016, this decreased to 65% of students. This demonstrates a year over year decline of 1 percentage point.</p> <p>Final Evaluation:</p>	
	<input type="checkbox"/> Data presented serve as evidence of improved academic performance, and thus is evaluated as sufficient.	<input checked="" type="checkbox"/> Data presented does not serve as evidence of improved academic performance, and thus is evaluated as insufficient.
<p>[D.3]</p> <p>2014-2015 Galileo Student Growth and Achievement Reports for grades 2-8 in the Bottom 25%</p>	<p>Charter holder indicated the intended purpose of the document was to demonstrate: improved academic performance in Student Median Growth Percentile (SGP) bottom 25% – Math</p> <p>The documents provided demonstrate evidence of improved academic performance in Student Median Growth Percentile (SGP) bottom 25% – Math.</p>	

<p>2015-2016 Galileo Student Growth and Achievement Reports for grades 2-8 in the Bottom 25%</p>	<p>Galileo Student Growth and Achievement reports show that in FY 2015, 57% of students were demonstrating expected growth. In FY 2016, this increased to 58% of students. This demonstrates a year over year improvement of 1 percentage point.</p> <p>Final Evaluation:</p>	
<p>[D.4]</p> <p>2014-2015 Galileo Student Growth and Achievement Reports for grades 2-8 in the Bottom 25%</p> <p>2015-2016 Galileo Student Growth and Achievement Reports for grades 2-8 in the Bottom 25%</p>	<p>Charter holder indicated the intended purpose of the document was to demonstrate: improved academic performance in Student Median Growth Percentile (SGP) bottom 25% – Reading</p> <p>The documents provided DO NOT demonstrate evidence of improved academic performance in Student Median Growth Percentile (SGP) bottom 25% – Reading.</p> <p>Galileo Student Growth and Achievement reports show that in FY 2015, 68% of students were demonstrating expected growth. In FY 2016, this decreased to 56% of students. This demonstrates a year over year decline of 12 percentage points.</p> <p>Final Evaluation:</p>	
<p>[D.5]</p> <p>2014-2015 Galileo Custom Report Spreadsheet Including Percentile Ranks</p> <p>2015-2016 Galileo Custom Report Spreadsheet Including Percentile Ranks</p>	<p>Charter holder indicated the intended purpose of the document was to demonstrate: improved academic performance in Percent Passing – Math</p> <p>The documents provided demonstrate evidence of improved academic performance in Percent Passing – Math</p> <p>Year over year post-test student percentile ranks from the Galileo assessment system show that in FY 2015, 59% of students were at or above the 50th percentile. In FY 2016, this increased to 64% of students. This demonstrates a year over year improvement of 5 percentage points.</p> <p>Final Evaluation:</p>	
	<p><input checked="" type="checkbox"/> Data presented serve as evidence of improved academic performance, and thus is evaluated as sufficient.</p>	<p><input type="checkbox"/> Data presented does not serve as evidence of improved academic performance, and thus is evaluated as insufficient.</p>

<p>[D.6]</p> <p>2014-2015 Galileo Custom Report Spreadsheet Including Percentile Ranks</p> <p>2015-2016 Galileo Custom Report Spreadsheet Including Percentile Ranks</p>	<p>Charter holder indicated the intended purpose of the document was to demonstrate: improved academic performance in Percent Passing – Reading</p> <p>The documents provided demonstrate evidence of improved academic performance in Percent Passing – Reading.</p> <p>Year over year post-test student percentile ranks from the Galileo assessment system show that in FY 2015, 61% of students were at or above the 50th percentile. In FY 2016, this increased to 67% of students. This demonstrates a year over year improvement of 6 percentage points.</p> <p>Final Evaluation:</p>	
<p>[D.7]</p> <p>2014-2015 Galileo Custom Report Spreadsheet Including Percentile Ranks with ELL students identified</p> <p>2015-2016 Galileo Custom Report Spreadsheet Including Percentile Ranks with ELL students identified</p>	<p>Charter holder indicated the intended purpose of the document was to demonstrate: improved academic performance in Percent Passing Subgroup, ELL – Math</p> <p>The documents provided demonstrate evidence of improved academic performance in Percent Passing Subgroup, ELL – Math.</p> <p>Year over year post-test student percentile ranks for ELL students generated from the Galileo assessment system show that in FY 2015, 8% of students were at or above the 50th percentile. In FY 2016, this increased to 37% of students. This demonstrates a year over year improvement of 29 percentage points.</p> <p>Final Evaluation:</p>	
<p>[D.8]</p> <p>2014-2015 Galileo Custom Report Spreadsheet Including Percentile Ranks with ELL students identified</p> <p>2015-2016 Galileo Custom Report Spreadsheet Including Percentile Ranks with ELL students identified</p>	<p>Charter holder indicated the intended purpose of the document was to demonstrate: improved academic performance in Percent Passing Subgroup, ELL – Reading</p> <p>The documents provided demonstrate evidence of improved academic performance in Percent Passing Subgroup, ELL – Reading.</p> <p>Year over year post-test student percentile ranks for ELL students generated from the Galileo assessment system show that in FY 2015, 15% of students were at or above the 50th percentile. In FY 2016, this increased to 21% of students. This demonstrates a year over year improvement of 6 percentage points.</p> <p>Final Evaluation:</p>	
	<p><input checked="" type="checkbox"/> Data presented serve as evidence of improved academic performance, and thus is evaluated as sufficient.</p>	<p><input type="checkbox"/> Data presented does not serve as evidence of improved academic performance, and thus is evaluated as insufficient.</p>

<p>[D.9]</p> <p>2014-2015 Galileo Custom Report Spreadsheet Including Percentile Ranks with FRL students identified</p> <p>2015-2016 Galileo Custom Report Spreadsheet Including Percentile Ranks with FRL students identified</p>	<p>Charter holder indicated the intended purpose of the document was to demonstrate: improved academic performance in Percent Passing Subgroup, FRL – Math</p> <p>The documents provided demonstrate evidence of improved academic performance in Percent Passing Subgroup, FRL – Math.</p> <p>Year over year post-test student percentile ranks for FRL students generated from the Galileo assessment system show that in FY 2015, 58% of students were at or above the 50th percentile. In FY 2016, this increased to 63% of students. This demonstrates a year over year improvement of 8 percentage points.</p> <p>Final Evaluation:</p> <table border="1" data-bbox="571 492 1913 591"> <tr> <td data-bbox="571 492 1247 591"> <input checked="" type="checkbox"/> Data presented serve as evidence of improved academic performance, and thus is evaluated as sufficient. </td> <td data-bbox="1247 492 1913 591"> <input type="checkbox"/> Data presented does not serve as evidence of improved academic performance, and thus is evaluated as insufficient. </td> </tr> </table>		<input checked="" type="checkbox"/> Data presented serve as evidence of improved academic performance, and thus is evaluated as sufficient.	<input type="checkbox"/> Data presented does not serve as evidence of improved academic performance, and thus is evaluated as insufficient.
<input checked="" type="checkbox"/> Data presented serve as evidence of improved academic performance, and thus is evaluated as sufficient.	<input type="checkbox"/> Data presented does not serve as evidence of improved academic performance, and thus is evaluated as insufficient.			
<p>[D.10]</p> <p>2014-2015 Galileo Custom Report Spreadsheet Including Percentile Ranks with FRL students identified</p> <p>2015-2016 Galileo Custom Report Spreadsheet Including Percentile Ranks with FRL students identified</p>	<p>Charter holder indicated the intended purpose of the document was to demonstrate: improved academic performance in Percent Passing Subgroup, FRL – Reading</p> <p>The documents provided demonstrate evidence of improved academic performance in Percent Passing Subgroup, FRL – Reading.</p> <p>Year over year post-test student percentile ranks for FRL students generated from the Galileo assessment system show that in FY 2015, 59% of students were at or above the 50th percentile. In FY 2016, this increased to 67% of students. This demonstrates a year over year improvement of 8 percentage points.</p> <p>Final Evaluation:</p> <table border="1" data-bbox="571 950 1913 1049"> <tr> <td data-bbox="571 950 1247 1049"> <input checked="" type="checkbox"/> Data presented serve as evidence of improved academic performance, and thus is evaluated as sufficient. </td> <td data-bbox="1247 950 1913 1049"> <input type="checkbox"/> Data presented does not serve as evidence of improved academic performance, and thus is evaluated as insufficient. </td> </tr> </table>		<input checked="" type="checkbox"/> Data presented serve as evidence of improved academic performance, and thus is evaluated as sufficient.	<input type="checkbox"/> Data presented does not serve as evidence of improved academic performance, and thus is evaluated as insufficient.
<input checked="" type="checkbox"/> Data presented serve as evidence of improved academic performance, and thus is evaluated as sufficient.	<input type="checkbox"/> Data presented does not serve as evidence of improved academic performance, and thus is evaluated as insufficient.			
<p>[D.11]</p> <p>2014-2015 Galileo Custom Report Spreadsheet Including Percentile Ranks with SPED students identified</p> <p>2015-2016 Galileo Custom Report Spreadsheet Including Percentile Ranks with SPED students identified</p>	<p>Charter holder indicated the intended purpose of the document was to demonstrate: improved academic performance in Percent Passing Subgroup, Students with disabilities – Math</p> <p>The documents provided DO NOT demonstrate evidence of improved academic performance in Percent Passing Subgroup, Students with disabilities – Math.</p> <p>Year over year post-test student percentile ranks for students with disabilities generated from the Galileo assessment system show that in FY 2015, 49% of students were at or above the 50th percentile. In FY 2016, this decreased to 23% of students. This demonstrates a year over year decline of 26 percentage points.</p> <p>Final Evaluation:</p>			

	<input type="checkbox"/> Data presented serve as evidence of improved academic performance, and thus is evaluated as sufficient.	<input checked="" type="checkbox"/> Data presented does not serve as evidence of improved academic performance, and thus is evaluated as insufficient.
<p>[D.12]</p> <p>2014-2015 Galileo Custom Report Spreadsheet Including Percentile Ranks with SPED students identified</p> <p>2015-2016 Galileo Custom Report Spreadsheet Including Percentile Ranks with SPED students identified</p>	<p>Charter holder indicated the intended purpose of the document was to demonstrate: improved academic performance in Percent Passing Subgroup, Students with disabilities – Reading</p> <p>The documents provided DO NOT demonstrate evidence of improved academic performance in Percent Passing Subgroup, Students with disabilities – Reading.</p> <p>Year over year post-test student percentile ranks for students with disabilities generated from the Galileo assessment system show that in FY 2015, 35% of students were at or above the 50th percentile. In FY 2016, this decreased to 17% of students. This demonstrates a year over year decline of 18 percentage points.</p> <p>Final Evaluation:</p>	
	<input type="checkbox"/> Data presented serve as evidence of improved academic performance, and thus is evaluated as sufficient.	<input checked="" type="checkbox"/> Data presented does not serve as evidence of improved academic performance, and thus is evaluated as insufficient.



Demonstration of Sufficient Progress Site Visit Inventory

Charter Holder Name: Heritage Elementary School
 School Name: Heritage Elementary School - Williams
 Site Visit Date: May 16, 2016

Required for: Renewal
 Evaluation Criteria Area: Data

Document Name/Identification	Intended Purpose and Discussion Outcome			
<p>[D.1]</p>	<p>Charter holder indicated the intended purpose of the document was to demonstrate: improved academic performance in Student Median Growth Percentile (SGP) - Math</p> <p>The Charter Holder met the Board’s Academic Performance Expectations and was not required to report on this measure.</p>			
<p>[D.2]</p> <p>2014-2015 Galileo Student Growth and Achievement Reports for grades 2-8</p> <p>2015-2016 Galileo Student Growth and Achievement Reports for grades 2-8</p>	<p>Charter holder indicated the intended purpose of the document was to demonstrate: improved academic performance in Student Median Growth Percentile (SGP) - Reading</p> <p>The documents provided DO NOT demonstrate evidence of improved academic performance in Student Median Growth Percentile (SGP) – Reading.</p> <p>Galileo Student Growth and Achievement reports show that in FY 2015, 58% of students were demonstrating expected growth. In FY 2016, this decreased to 56% of students. This demonstrates a year over year decline of 2 percentage points.</p> <p>Final Evaluation:</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; padding: 5px;"> <input type="checkbox"/> Data presented serve as evidence of improved academic performance, and thus is evaluated as sufficient. </td> <td style="width: 50%; padding: 5px;"> <input checked="" type="checkbox"/> Data presented does not serve as evidence of improved academic performance, and thus is evaluated as insufficient. </td> </tr> </table>		<input type="checkbox"/> Data presented serve as evidence of improved academic performance, and thus is evaluated as sufficient.	<input checked="" type="checkbox"/> Data presented does not serve as evidence of improved academic performance, and thus is evaluated as insufficient.
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<p>[D.3]</p> <p>2014-2015 Galileo Student Growth and Achievement Reports for grades 2-8 in the Bottom 25%</p> <p>2015-2016 Galileo Student Growth and Achievement Reports for grades 2-8 in the Bottom 25%</p>	<p>Charter holder indicated the intended purpose of the document was to demonstrate: improved academic performance in Student Median Growth Percentile (SGP) bottom 25% – Math</p> <p>The documents provided demonstrate evidence of improved academic performance in Student Median Growth Percentile (SGP) bottom 25% – Math.</p> <p>Galileo Student Growth and Achievement reports show that in FY 2015, 62% of students were demonstrating expected growth. In FY 2016, this increased to 76% of students. This demonstrates a year over year improvement of 14 percentage point.</p> <p>Final Evaluation:</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; padding: 5px;"> <input checked="" type="checkbox"/> Data presented serve as evidence of improved academic performance, and thus is evaluated as sufficient. </td> <td style="width: 50%; padding: 5px;"> <input type="checkbox"/> Data presented does not serve as evidence of improved academic performance, and thus is evaluated as insufficient. </td> </tr> </table>		<input checked="" type="checkbox"/> Data presented serve as evidence of improved academic performance, and thus is evaluated as sufficient.	<input type="checkbox"/> Data presented does not serve as evidence of improved academic performance, and thus is evaluated as insufficient.
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<p>[D.4]</p> <p>2014-2015 Galileo Student Growth and Achievement Reports for grades 2-8 in the Bottom 25%</p> <p>2015-2016 Galileo Student Growth and Achievement Reports for grades 2-8 in the Bottom 25%</p>	<p>Charter holder indicated the intended purpose of the document was to demonstrate: improved academic performance in Student Median Growth Percentile (SGP) bottom 25% – Reading.</p> <p>The documents provided DO NOT demonstrate evidence of improved academic performance in Student Median Growth Percentile (SGP) bottom 25% – Reading.</p> <p>Galileo Student Growth and Achievement reports show that in FY 2015, 62% of students were demonstrating expected growth. In FY 2016, this decreased to 55% of students. This demonstrates a year over year decline of 7 percentage points.</p> <p>Final Evaluation:</p>	
<p>[D.5]</p> <p>2014-2015 Galileo Custom Report Spreadsheet Including Percentile Ranks</p> <p>2015-2016 Galileo Custom Report Spreadsheet Including Percentile Ranks</p>	<p>Charter holder indicated the intended purpose of the document was to demonstrate: improved academic performance in Percent Passing – Math</p> <p>The documents provided demonstrate evidence of improved academic performance in Percent Passing – Math.</p> <p>Year over year post-test student percentile ranks from the Galileo assessment system show that in FY 2015, 38% of students were at or above the 50th percentile. In FY 2016, this increased to 58% of students. This demonstrates a year over year improvement of 20 percentage points.</p> <p>Final Evaluation:</p>	
<p>[D.6]</p> <p>2014-2015 Galileo Custom Report Spreadsheet Including Percentile Ranks</p> <p>2015-2016 Galileo Custom Report Spreadsheet Including Percentile Ranks</p>	<p>Charter holder indicated the intended purpose of the document was to demonstrate: improved academic performance in Percent Passing – Reading</p> <p>The documents provided DO NOT demonstrate evidence of improved academic performance in Percent Passing – Reading.</p> <p>Year over year post-test student percentile ranks from the Galileo assessment system show that in FY 2015, 50% of students were at or above the 50th percentile. In FY 2016, this decreased to 49% of students. This demonstrates a year over year decline of 1 percentage point.</p> <p>Final Evaluation:</p>	

	<input type="checkbox"/> Data presented serve as evidence of improved academic performance, and thus is evaluated as sufficient.	<input checked="" type="checkbox"/> Data presented does not serve as evidence of improved academic performance, and thus is evaluated as insufficient.
<p>[D.7]</p> <p>2014-2015 Galileo Custom Report Spreadsheet Including Percentile Ranks with ELL students identified</p> <p>2015-2016 Galileo Custom Report Spreadsheet Including Percentile Ranks with ELL students identified</p>	<p>Charter holder indicated the intended purpose of the document was to demonstrate: improved academic performance in Percent Passing Subgroup, ELL – Math</p> <p>The documents provided demonstrate evidence of improved academic performance in Percent Passing Subgroup, ELL – Math.</p> <p>Year over year post-test student percentile ranks for ELL students generated from the Galileo assessment system show that in FY 2015, 0% of students were at or above the 50th percentile. In FY 2016, this increased to 43% of students. This demonstrates a year over year improvement of 43 percentage points.</p> <p>Final Evaluation:</p>	
	<input checked="" type="checkbox"/> Data presented serve as evidence of improved academic performance, and thus is evaluated as sufficient.	<input type="checkbox"/> Data presented does not serve as evidence of improved academic performance, and thus is evaluated as insufficient.
<p>[D.8]</p> <p>2014-2015 Galileo Custom Report Spreadsheet Including Percentile Ranks with ELL students identified</p> <p>2015-2016 Galileo Custom Report Spreadsheet Including Percentile Ranks with ELL students identified</p>	<p>Charter holder indicated the intended purpose of the document was to demonstrate: improved academic performance in Percent Passing Subgroup, ELL – Reading</p> <p>The documents provided demonstrate evidence of improved academic performance in Percent Passing Subgroup, ELL – Reading.</p> <p>Year over year post-test student percentile ranks for ELL students generated from the Galileo assessment system show that in FY 2015, 18% of students were at or above the 50th percentile. In FY 2016, this increased to 22% of students. This demonstrates a year over year improvement of 4 percentage points.</p> <p>Final Evaluation:</p>	
	<input checked="" type="checkbox"/> Data presented serve as evidence of improved academic performance, and thus is evaluated as sufficient.	<input type="checkbox"/> Data presented does not serve as evidence of improved academic performance, and thus is evaluated as insufficient.

<p>[D.9]</p> <p>2014-2015 Galileo Custom Report Spreadsheet Including Percentile Ranks with FRL students identified</p> <p>2015-2016 Galileo Custom Report Spreadsheet Including Percentile Ranks with FRL students identified</p>	<p>Charter holder indicated the intended purpose of the document was to demonstrate: improved academic performance in Percent Passing Subgroup, FRL – Math</p> <p>The documents provided demonstrate evidence of improved academic performance in Percent Passing Subgroup, FRL – Math.</p> <p>Year over year post-test student percentile ranks for FRL students generated from the Galileo assessment system show that in FY 2015, 33% of students were at or above the 50th percentile. In FY 2016, this increased to 57% of students. This demonstrates a year over year improvement of 24 percentage points.</p> <p>Final Evaluation:</p> <table border="1" data-bbox="571 492 1913 591"> <tr> <td data-bbox="571 492 1247 591"> <input checked="" type="checkbox"/> Data presented serve as evidence of improved academic performance, and thus is evaluated as sufficient. </td> <td data-bbox="1247 492 1913 591"> <input type="checkbox"/> Data presented does not serve as evidence of improved academic performance, and thus is evaluated as insufficient. </td> </tr> </table>		<input checked="" type="checkbox"/> Data presented serve as evidence of improved academic performance, and thus is evaluated as sufficient.	<input type="checkbox"/> Data presented does not serve as evidence of improved academic performance, and thus is evaluated as insufficient.
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<p>[D.10]</p> <p>2014-2015 Galileo Custom Report Spreadsheet Including Percentile Ranks with FRL students identified</p> <p>2015-2016 Galileo Custom Report Spreadsheet Including Percentile Ranks with FRL students identified</p>	<p>Charter holder indicated the intended purpose of the document was to demonstrate: improved academic performance in Percent Passing Subgroup, FRL – Reading</p> <p>The documents provided DO NOT demonstrate evidence of improved academic performance in Percent Passing Subgroup, FRL – Reading.</p> <p>Year over year post-test student percentile ranks for FRL students generated from the Galileo assessment system show that in FY 2015, 50% of students were at or above the 50th percentile. In FY 2016, this decreased to 45% of students. This demonstrates a year over year decline of 5 percentage points.</p> <p>Final Evaluation:</p> <table border="1" data-bbox="571 950 1913 1049"> <tr> <td data-bbox="571 950 1247 1049"> <input type="checkbox"/> Data presented serve as evidence of improved academic performance, and thus is evaluated as sufficient. </td> <td data-bbox="1247 950 1913 1049"> <input checked="" type="checkbox"/> Data presented does not serve as evidence of improved academic performance, and thus is evaluated as insufficient. </td> </tr> </table>		<input type="checkbox"/> Data presented serve as evidence of improved academic performance, and thus is evaluated as sufficient.	<input checked="" type="checkbox"/> Data presented does not serve as evidence of improved academic performance, and thus is evaluated as insufficient.
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<p>[D.11]</p> <p>2014-2015 Galileo Custom Report Spreadsheet Including Percentile Ranks with SPED students identified</p> <p>2015-2016 Galileo Custom Report Spreadsheet Including Percentile Ranks with SPED students identified</p>	<p>Charter holder indicated the intended purpose of the document was to demonstrate: improved academic performance in Percent Passing Subgroup, Students with disabilities – Math</p> <p>The documents provided demonstrate evidence of improved academic performance in Percent Passing Subgroup, Students with disabilities – Math.</p> <p>Year over year post-test student percentile ranks for students with disabilities generated from the Galileo assessment system show that in FY 2015, 43% of students were at or above the 50th percentile. In FY 2016, this increased to 50% of students. This demonstrates a year over year improvement of 7 percentage points.</p> <p>Final Evaluation:</p>			

	<input checked="" type="checkbox"/> Data presented serve as evidence of improved academic performance, and thus is evaluated as sufficient.	<input type="checkbox"/> Data presented does not serve as evidence of improved academic performance, and thus is evaluated as insufficient.
<p>[D.12]</p> <p>2014-2015 Galileo Custom Report Spreadsheet Including Percentile Ranks with SPED students identified</p> <p>2015-2016 Galileo Custom Report Spreadsheet Including Percentile Ranks with SPED students identified</p>	<p>Charter holder indicated the intended purpose of the document was to demonstrate: improved academic performance in Percent Passing Subgroup, Students with disabilities – Reading</p> <p>The documents provided demonstrate evidence of maintained academic performance in Percent Passing Subgroup, Students with disabilities – Reading.</p> <p>Year over year post-test student percentile ranks for students with disabilities generated from the Galileo assessment system show that in FY 2015, 33% of students were at or above the 50th percentile. In FY 2016, this remained at 33% of students. This demonstrates maintained academic performance in a year over year comparison.</p> <p>Final Evaluation:</p>	
	<input checked="" type="checkbox"/> Data presented serve as evidence of maintained academic performance, and thus is evaluated as sufficient.	<input type="checkbox"/> Data presented does not serve as evidence of improved academic performance, and thus is evaluated as insufficient.



Demonstration of Sufficient Progress Site Visit Inventory

Charter Holder Name: Heritage Elementary School
 School Name: Heritage Elementary School, Heritage Elementary
 Williams

Site Visit Date: May 16, 2016
 Required for: Renewal
 Evaluation Criteria Area: Curriculum

Document Name/Identification	Intended Purpose and Discussion Outcome		
<p>[C.A.1]</p> <ul style="list-style-type: none"> • Beyond Textbooks Curriculum Calendars • Standards Alignment Checklist • Curriculum Alignment Checklists • Gap Analysis • Curriculum Request Forms 	<p>Charter holder indicated the intended purpose of the document was to demonstrate: the process for evaluating curriculum.</p> <p>The documents provided demonstrate evidence of the following:</p> <ul style="list-style-type: none"> • Standards Alignment Checklists are first completed by the district curriculum committee to verify that the adopted Beyond Textbook Curriculum Calendars, include all of the ACCR standards for each grade level, Kindergarten through 8th grade. • Curriculum Alignment Checklists are then completed by the district curriculum committee for all grade levels. • Information from the Standards Alignment and Curriculum Alignment Checklists are transferred to a comprehensive Gap Analysis and the district curriculum committee evaluates these forms. • Any gaps found in the current curriculum are recorded and submitted to site principals using Curriculum Request Forms. <p>Final Evaluation:</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; padding: 5px;"> <input checked="" type="checkbox"/> Documents presented serve as detailed evidence of implementation of each of the relevant described processes, and thus are evaluated as sufficient. </td> <td style="width: 50%; padding: 5px;"> <input type="checkbox"/> Documents presented do not demonstrate evidence of implementation of processes to address the required elements, and thus are evaluated as insufficient. </td> </tr> </table>	<input checked="" type="checkbox"/> Documents presented serve as detailed evidence of implementation of each of the relevant described processes, and thus are evaluated as sufficient.	<input type="checkbox"/> Documents presented do not demonstrate evidence of implementation of processes to address the required elements, and thus are evaluated as insufficient.
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<p>[C.A.2]</p> <ul style="list-style-type: none"> • Beyond Textbooks Curriculum Calendars • Sample of Unwrapped Documents • Gap Analysis • Sample of District Common Formative Assessment • Galileo Benchmark Blueprint 	<p>Charter holder indicated the intended purpose of the document was to demonstrate: the process for evaluating how effectively the curriculum enables students to meet all standards.</p> <p>The documents provided demonstrate evidence of the following:</p> <ul style="list-style-type: none"> • All essential standards are scheduled prior to State Assessments and year long standards are scheduled throughout the year on the curriculum calendars. (BT Curriculum Calendars) • Unwrapped documents then ensure standards are taught to the appropriate level of “rigor”, assist in the development of common formative assessments, benchmark assessments, performance tasks and model products as well as assist in the development of student friendly language for essential standards. • Formative assessments results are recorded by classroom teachers on Data Collection Sheets to determine mastery level of each standard assessed. 		



<ul style="list-style-type: none"> • Data Collection Sheets • Data Reflection Form • Curriculum Calendar Revision Spreadsheet 	<ul style="list-style-type: none"> • Data Reflection forms are used to identify trends and develop plans for intervention or extending and enrichment. <p>Final Evaluation:</p>	
<p>[C.A.3]</p> <ul style="list-style-type: none"> • Current Alignment Checklist • Gap Analysis • Curriculum Request Forms 	<p>Charter holder indicated the intended purpose of the document was to demonstrate: how the Charter Holder identifies curricular gaps.</p> <p>The documents provided demonstrate evidence of the following:</p> <ul style="list-style-type: none"> • The district curriculum committee identifies gaps in the current curriculum by completing Curriculum Alignment Checklists for all grade levels and subgroups. • A detailed Gap Analysis, designed to assess whether the current curriculum is sufficient for meeting the specific needs of all students and subgroup populations, is completed to further assess the results of the Curriculum Alignment Checklists. • The curriculum committee then shares the Gap Analysis with instructional staff to analyze and determine whether additional curriculum and resources are needed to teach the ACCR standards to mastery. <p>Final Evaluation:</p>	<p><input type="checkbox"/> Documents presented do not demonstrate evidence of implementation of processes to address the required elements, and thus are evaluated as insufficient.</p>
<p>[C.B.1]</p> <ul style="list-style-type: none"> • Site Specific Gap Analysis • District Curriculum Meeting Sign-ins • District Curriculum Meeting Agendas • District Curriculum Meeting Minutes • New/Supplemental Curriculum Request Form 	<p>Charter holder indicated the intended purpose of the document was to demonstrate: the Charter Holder’s process for adopting curriculum based on its evaluation processes.</p> <p>The documents provided demonstrate evidence of the following:</p> <ul style="list-style-type: none"> • A proposal is created using data/evidence of need, research conducted for specific curriculum and the Curriculum Request Form. • The site administrative team reviews requests/proposals for the adoption of new and/or supplemental curriculum to ensure that it is research-based and fulfills the identified gaps. • Site principals will determine whether the curriculum proposed meets the needs of students, sufficiently addresses the standards, fulfills curricular gaps, and is financially feasible. <p>Final Evaluation:</p>	

<ul style="list-style-type: none"> • Sample New/Supplemental Curriculum Proposal 	<input checked="" type="checkbox"/> Documents presented serve as detailed evidence of implementation of each of the relevant described processes, and thus are evaluated as sufficient.	<input type="checkbox"/> Documents presented do not demonstrate evidence of implementation of processes to address the required elements, and thus are evaluated as insufficient.
<p>[C.B.2]</p> <ul style="list-style-type: none"> • District Curriculum Committee Meeting Sign-ins • District Curriculum Committee Meeting Agendas • District Curriculum Committee Meeting Minutes • Professional Development for new staff and/or new curriculum • Criteria for Evaluating Effectiveness of Curriculum • Curriculum Request Form • Proposal Feedback 	<p>Charter holder indicated the intended purpose of the document was to demonstrate: the Charter Holder’s process for evaluating new and/or supplemental curriculum options.</p> <p>The documents provided demonstrate evidence of the following:</p> <ul style="list-style-type: none"> • A proposal is created using data/evidence of need, research conducted for specific curriculum and the Curriculum Request Form. • The site administrative team reviews requests/proposals for the adoption of new and/or supplemental curriculum to ensure that it is research-based and fulfills the identified gaps. Site principals will determine whether the curriculum proposed meets the needs of students, sufficiently addresses the standards, fills curricular gaps, and is financially feasible. • Site principals ensure that curriculum includes materials sufficient for meeting the academic needs of students within specified grade levels and subgroups. <p>Final Evaluation:</p>	
<p>[C.C.1]</p> <ul style="list-style-type: none"> • Gap Analysis • Curriculum Meeting Sign-ins • Curriculum Meeting Agendas • Curriculum Meeting Minutes • New/Supplemental 	<input checked="" type="checkbox"/> Documents presented serve as detailed evidence of implementation of each of the relevant described processes, and thus are evaluated as sufficient.	<input type="checkbox"/> Documents presented do not demonstrate evidence of implementation of processes to address the required elements, and thus are evaluated as insufficient.

<p>Curriculum Request Form</p> <ul style="list-style-type: none"> • Sample New/Supplemental Curriculum Proposal 	<p><input checked="" type="checkbox"/> Documents presented serve as detailed evidence of implementation of each of the relevant described processes, and thus are evaluated as sufficient.</p>	<p><input type="checkbox"/> Documents presented do not demonstrate evidence of implementation of processes to address the required elements, and thus are evaluated as insufficient.</p>
<p>[C.C.2]</p> <ul style="list-style-type: none"> • Curriculum Meeting Sign-ins • Curriculum Meeting Agendas • Curriculum Meeting Minutes • Curriculum Calendar Revision Spreadsheet • Galileo Blueprint Revision Spreadsheet • New/Supplemental Curriculum Request Form • Sample New/Supplemental Curriculum Proposal <ul style="list-style-type: none"> • MATH & ELA Curriculum Changes • 2015_BTCurriculumCalendar 	<p>Charter holder indicated the intended purpose of the document was to demonstrate: the Charter Holder’s process for revising the curriculum.</p> <p>The documents provided demonstrate evidence of the following:</p> <ul style="list-style-type: none"> • A proposal is created using data/evidence of need, research conducted for specific curriculum and the Curriculum Request Form. • The site administrative team reviews requests/proposals for the adoption of new and/or supplemental curriculum to ensure that it is research-based and fulfills the identified gaps. Site principals will determine whether the curriculum proposed meets the needs of students, sufficiently addresses the standards, fills curricular gaps, and is financially feasible. • Site principals ensure that curriculum includes materials sufficient for meeting the academic needs of students within specified grade levels and subgroups. • Curriculum Changes were made to BT based on feedback from the charter holder. Charter holder conducted gap analysis to <p>Final Evaluation:</p>	
	<p><input checked="" type="checkbox"/> Documents presented serve as detailed evidence of implementation of each of the relevant described processes, and thus are evaluated as sufficient.</p>	<p><input type="checkbox"/> Documents presented do not demonstrate evidence of implementation of processes to address the required elements, and thus are evaluated as insufficient.</p>

<p>[C.D.1]</p> <ul style="list-style-type: none"> • Expectations for Curriculum Implementation • Beyond textbook Non-Negotiables • Welcome Week Agenda • New Teacher Induction Agenda • Professional Development Sign-ins • Copy of BT 101/102 PD Presentations/Folders • Instructional Staff Binders • Teacher Mentor Program PD Schedule • Classroom Walkthrough Form • Informal Observation Form • Lesson Plan Feedback 	<p>Charter holder indicated the intended purpose of the document was to demonstrate: the Charter Holder’s process for ensuring the curriculum is implemented with fidelity, and that these expectations have been communicated to instructional staff.</p> <p>The documents provided demonstrate evidence of the following:</p> <ul style="list-style-type: none"> • The Expectations for Curriculum Implementation (located in the Employee Handbook) and Beyond Textbook Non-Negotiables, are reviewed by site principals and department heads with all instructional staff. • Beyond Textbook 101 and 102 along with other professional developments are provided to all instructional staff members. New Teacher Induction program includes introduction and overview of Beyond Textbooks. • Classroom Walkthroughs and Informal Observations provide an outlet for observing curriculum implementation at an administrative level. • Lesson Plan Feedback is issued by assistant principals and returned to teachers with suggestions for improvements or modifications in curriculum planning and implementation. • Teacher Mentor Program PD Schedule includes new teacher induction to support implementation of curriculum with fidelity. 	
	<p>Final Evaluation:</p> <p><input checked="" type="checkbox"/> Documents presented serve as detailed evidence of implementation of each of the relevant described processes, and thus are evaluated as sufficient.</p>	<p><input type="checkbox"/> Documents presented do not demonstrate evidence of implementation of processes to address the required elements, and thus are evaluated as insufficient.</p>

<p>[C.D.2]</p> <ul style="list-style-type: none"> • Expectations for Curriculum Implementation • Beyond textbook Non-Negotiables • Welcome Week Agenda • New Teacher Induction Agenda • Professional Development Sign-ins • Copy of BT 101/102 PD Presentations/Folders • Instructional Staff Binders • Teacher Mentor Program PD Schedule • Classroom Walkthrough Form • Informal Observation Form • Supplemental Instruction Informal Classroom Observation Form • Lesson Plan Feedback (General Ed and Supplemental Instruction) 	<p>Charter holder indicated the intended purpose of the document was to demonstrate: the Charter Holder’s process for ensuring consistent use of curricular tools, and that these expectations have been communicated to instructional staff.</p> <p>The documents provided demonstrate evidence of the following:</p> <ul style="list-style-type: none"> • The Charter Holder’s process for ensuring the consistent use of curricular tools involves the clear and consistent communication of professional expectations for teachers and instructional staff, ongoing professional development in curriculum planning, usage, and implementation, and follow-up classroom walkthroughs and informal observations. Classroom walkthroughs and informal observations of all instructional staff are conducted by principals, department heads, and assistant principals to ensure that the consistent use of curricular tools (e.g. curriculum calendars and unwrapped documents) is occurring. • Team Leads ensure lessons are aligned to curriculum calendars and academic rigor and materials are aligned with Unwrapped Documents. • Assistant principals evaluate the weekly lesson plans to ensure core and supplemental curricular tools are being utilized in General Education Lesson Plans. • Department heads also evaluate weekly lesson plans of supplemental services to ensure core and supplemental curricular tools are being utilized during supplemental instruction. <p>Final Evaluation:</p>	
	<p><input checked="" type="checkbox"/> Documents presented serve as detailed evidence of implementation of each of the relevant described processes, and thus are evaluated as sufficient.</p>	<p><input type="checkbox"/> Documents presented do not demonstrate evidence of implementation of processes to address the required elements, and thus are evaluated as insufficient.</p>

<p>[C.D.3]</p> <ul style="list-style-type: none"> • Sample of BT Curriculum Calendars • Beyond textbook Non-Negotiables • Welcome Week Agenda • New Teacher Induction Agenda • Professional Development Sign-ins • Copy of BT 101/102 PD Presentations/Folders • Sample of Unwrapped Documents • Lesson Plan Feedback • Sample of District Common Formative Assessment • Galileo Benchmark Assessment Blueprint • Data Collection Sheets (Formative Assessment Data) • Reteach/Enrich Expectations • Galileo Assessment Calendar • Data Reflection Form (Galileo Benchmark Data) • Informal Observation Form • PLC Forms 	<p>Charter holder indicated the intended purpose of the document was to demonstrate: the Charter Holder’s process to ensure that all grade-level standards are taught to mastery within the academic year.</p> <p>The documents provided demonstrate evidence of the following:</p> <ul style="list-style-type: none"> • The Charter Holder ensures that all grade-level standards are taught to mastery by supplying instructional staff with a close alignment between Beyond Curriculum Calendars and school assessment plans in order to ensure all grade-level standards are taught to mastery within the academic year. • Assistant principals and department heads conduct lesson plan checks and lesson plan feedback to ensure teachers are following the Beyond Textbooks Curriculum Calendars and allotting the designated amount of time to each standard for students to achieve mastery. • District Formative Assessment results are collected in Data Collection Sheets which identify student results for each benchmark assessment to monitor student mastery. Data reflection forms guide teachers through analysis of student assessment results to identify trends and patterns in results. • PLC Forms record analysis of student assessments results. PLC forms identify specific action steps to be taken based on findings from data analysis. 	
	<p>Final Evaluation:</p> <p><input checked="" type="checkbox"/> Documents presented serve as detailed evidence of implementation of each of the relevant described processes, and thus are evaluated as sufficient.</p>	<p><input type="checkbox"/> Documents presented do not demonstrate evidence of implementation of processes to address the required elements, and thus are evaluated as insufficient.</p>

<p>[C.E.1]</p> <ul style="list-style-type: none"> • Curriculum Alignment Checklists • ACCR Standards • Standards Alignment Checklist • Site Specific Gap Analysis • 	<p>Charter holder indicated the intended purpose of the document was to demonstrate: the Charter Holder’s process for verifying that the curriculum is aligned to Arizona’s College and Career Ready Standards.</p> <p>The documents provided demonstrate evidence of the following:</p> <ul style="list-style-type: none"> • The district committee verifies that our curriculum is aligned to the AZCCRS by first filling out a gap analysis that indicates all grade level standards are present in the current curriculum and if not the supplemental material that is used to ensure that each standard is covered in a year. • A Curriculum Alignment Checklist is completed by committee members for each grade level to verify that the district’s current curriculum is aligned to the ACCR standards. • Curricular and assessment tools are cross-checked with the ACCR standards using the district’s Standards Alignment Checklist, which is completed by the district data committee at the beginning of the school year. This document ensures that all standards are addressed within the curriculum calendars and district assessments over the course of the school year. <p>Final Evaluation:</p>	
	<p><input checked="" type="checkbox"/> Documents presented serve as detailed evidence of implementation of each of the relevant described processes, and thus are evaluated as sufficient.</p>	<p><input type="checkbox"/> Documents presented do not demonstrate evidence of implementation of processes to address the required elements, and thus are evaluated as insufficient.</p>

<p>[C.E.2]</p> <ul style="list-style-type: none"> • Curriculum Alignment Checklists • Expectations for Curriculum Implementation • Lesson Plan Feedback (General Ed and Supplemental Instruction) • Informal Observation Form (Classroom Teachers) • Supplemental Instruction Informal Classroom Observation Form 	<p>Charter holder indicated the intended purpose of the document was to demonstrate: the Charter Holder’s process to monitor and evaluate changes to ensure that curriculum maintains alignment to Arizona’s College and Career Ready Standards when adopting or revising curriculum.</p> <p>The documents provided demonstrate evidence of the following:</p> <ul style="list-style-type: none"> • To ensure curriculum alignment to standards is maintained, any changes made to curriculum or instruction will be monitored by site principals and department heads to ensure that the Expectations for Curriculum Implementation are being fulfilled. Principals and department heads will evaluate curriculum alignment to the ACCR standards during lesson plan checks, lesson plan feedback, and classroom informal observations. • A proposal is created using data/evidence of need, research conducted for specific curriculum and the Curriculum Request Form. • The site administrative team reviews requests/proposals for the adoption of new and/or supplemental curriculum to ensure that it is research-based and fulfills the identified gaps. Site principals will determine whether the curriculum proposed meets the needs of students, sufficiently addresses the standards, fills curricular gaps, and is financially feasible. • Site principals ensure that curriculum includes materials sufficient for meeting the academic needs of students within specified grade levels and subgroups.
	<p>Final Evaluation:</p> <p><input checked="" type="checkbox"/> Documents presented serve as detailed evidence of implementation of each of the relevant described processes, and thus are evaluated as sufficient.</p> <p><input type="checkbox"/> Documents presented do not demonstrate evidence of implementation of processes to address the required elements, and thus are evaluated as insufficient.</p>
<p>[C.F.1]</p> <p>Bottom 25</p> <ul style="list-style-type: none"> • Shared Lesson Plans from General Education Teachers • Supplemental Instruction Lesson Plans • Lesson Plan Feedback (Supplemental Instruction) • Reading Intervention Matrix/Guide • Title I Student Progress Reports • Supplemental Instruction 	<p>Charter holder indicated the intended purpose of the document was to demonstrate: how the Charter Holder assesses subgroups to ensure that the supplemental and/or differentiated curriculum is effective for students in each of the four subgroups.</p> <p>The documents provided demonstrate evidence of the following:</p> <ul style="list-style-type: none"> • Title I Director reviews quarterly progress reports along with Galileo Intervention Group Reports to monitor individual student progress along with identify any trends and patterns within the department, specific grade-levels or individual classrooms. • The district ELL coordinator evaluates the current curriculum after every benchmark to assess whether specialized materials implemented by instructional staff were effective in helping ELL students meet the ACCR standards along with progress in specific standards. • AZELLA results are used to identify ELL students. ILLP documents identify ELP standards for each student. Documents are reviewed quarterly. Additional Title I support is provided to students. Other schoolwide

<p>Classroom Observation Form</p> <ul style="list-style-type: none"> Galileo Intervention Group Results Child Find/SST Meeting Summary Sample Intervention Plan Informal Observations Formal Evaluations <p>ELL</p> <ul style="list-style-type: none"> ELP Standards BT Progression Charts Gap Analysis ILLP's (Samples) ILLP Monitoring Form <p>Students with Disabilities</p> <ul style="list-style-type: none"> SpEd Progress Reports Galileo Intervention Group Results IEP Review IEP Meeting Notes (PWN or Email) Collaboration Conference Meeting Notes Shared Lesson Plans Informal Observations Formal Evaluations Shared LESSON PLAN checklist <p>FRL</p> <ul style="list-style-type: none"> 2015-2016 NCLB Report-Williams 	<p>curriculum processes are used to monitor curriculum. Grade level team review curriculum using the Curriculum Monitoring form to identify whether revisions or modifications are needed. ILLP Monitoring Form is used to conduct quarterly review of ILLP forms to ensure compliance with requirements.</p> <ul style="list-style-type: none"> Shared lesson plans are tracked to ensure that lesson plans are completed weekly for students with disabilities. The special education director monitors the progress of students in Special Education after each quarterly benchmark and/or department progress reports. It is during this time the director assesses whether the specific curriculum implemented by instructional staff was effective in helping students with disabilities meet or show growth on the ACCR standards based on individual abilities. Any curriculum or instruction found insufficient for meeting the academic needs of students with disabilities is addressed by the IEP team. IEPs are reviewed and updated based on student need. IEP Meeting notes record discussions and action steps to be taken based on a review of student assessment results. Lesson Plans are submitted to Title I department. Lesson Plans are reviewed for instructional strategies that are designed to address needs of students in subgroups. Supplemental Lesson Plans are created by interventionists. Includes standard, accommodations and interventions as well as instructional materials and resources used. Lesson Plan feedback is provided. Title I Student Progress Reports capture quarterly benchmark results and monitor student progress. SST Meeting Summary Notes record parent and teacher input to monitor student progress and determine the plan for the student and determine whether interventions are effective. <p>Final Evaluation:</p>	<p><input checked="" type="checkbox"/> Documents presented serve as detailed evidence of implementation of each of the relevant described processes, and thus are evaluated as sufficient.</p> <p><input type="checkbox"/> Documents presented do not demonstrate evidence of implementation of processes to address the required elements, and thus are evaluated as insufficient.</p>
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Demonstration of Sufficient Progress Site Visit Inventory

Charter Holder Name: Heritage Elementary School
 School Name: Heritage Elementary School, Heritage Elementary
 Williams

Site Visit Date: May 16, 2016
 Required for: Renewal
 Evaluation Criteria Area: Assessment

Document Name/Identification	Intended Purpose and Discussion Outcome		
<p>[A.A.1]</p> <ul style="list-style-type: none"> • Benchmark Assessment Schedule • Beyond Textbooks Curriculum Calendars • District Formative Assessments • Data Collection Sheets • Standards Alignment Checklists • Gap Analysis • Curriculum Calendar Revision Spreadsheet • Galileo Blueprint Revision Spreadsheet • Email correspondence with Galileo and Beyond Textbook Staff • Curriculum Meeting Agendas 	<p>Charter holder indicated the intended purpose of the document was to demonstrate: the process for evaluating assessment tools.</p> <p>The documents provided demonstrate evidence of the following:</p> <ul style="list-style-type: none"> • The district data committee evaluates the test blueprints of ATI-Galileo pre-tests, post-tests, and benchmark assessments (through the Gap Analysis) to ensure that they are aligned with and include all of the ACCR standards at each grade level throughout the year. This is achieved through the use of the Standards Alignment Checklists which are completed by grade-level teachers and then submitted to the district data committee. • The Data Committee then compiles misalignments and/or gaps to submit to site principals via spreadsheet (Curriculum Calendar Revision Spreadsheet and Galileo Blueprint Revision Spreadsheet). • Formative assessments tools are also reviewed for standards alignment and all assessments are scheduled in accordance with the curriculum calendars. The administration, grade-level teachers, department heads and the district curriculum and data committee also evaluates the assessment system to ensure that formative, benchmark, and summative assessment tools are correlative throughout the year. <p>Final Evaluation:</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; padding: 5px;"> <input checked="" type="checkbox"/> Documents presented serve as detailed evidence of implementation of each of the relevant described processes, and thus are evaluated as sufficient. </td> <td style="width: 50%; padding: 5px;"> <input type="checkbox"/> Documents presented do not demonstrate evidence of implementation of processes to address the required elements, and thus are evaluated as insufficient. </td> </tr> </table>	<input checked="" type="checkbox"/> Documents presented serve as detailed evidence of implementation of each of the relevant described processes, and thus are evaluated as sufficient.	<input type="checkbox"/> Documents presented do not demonstrate evidence of implementation of processes to address the required elements, and thus are evaluated as insufficient.
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<p>[A.A.2]</p> <ul style="list-style-type: none"> • Standards Alignment Checklists • Beyond Textbooks Curriculum Calendars 	<p>Charter holder indicated the intended purpose of the document was to demonstrate: the process for evaluating how assessments are aligned to the curriculum.</p> <p>The documents provided demonstrate evidence of the following:</p> <ul style="list-style-type: none"> • The Charter Holder ensures that the benchmark assessment system, (ATI-Galileo), is aligned to the ACCR standards by completing Standards Alignment Checklists for all grade levels. The district data committee then reviews the District Formative Assessments at each grade level for standards-alignment and verifies whether all 		

<ul style="list-style-type: none"> Curriculum Alignment Checklists Guarantee Statement from Beyond Textbooks via email 	<p>ACCR standards are being assessed within the allotted time frames on the Beyond Textbooks Curriculum Calendars.</p> <p>Final Evaluation:</p>	
<p>[A.A.3]</p> <ul style="list-style-type: none"> Expectation of Assessments Instructional Process Presentation Welcome Week Agenda (with Breakout Sessions) Unwrapped Document Samples Lesson Plan Feedback Samples New Teacher induction Agenda Instructional Staff Binders Teacher Mentor Program PD Schedule Informal Observation Form (Classroom Teachers) PLC Meeting Forms Data collection Sheets Data Reflection Sheets Reteach/Enrich Expectations Grade-level Daily Instruction Schedules 	<p><input checked="" type="checkbox"/> Documents presented serve as detailed evidence of implementation of each of the relevant described processes, and thus are evaluated as sufficient.</p>	<p><input type="checkbox"/> Documents presented do not demonstrate evidence of implementation of processes to address the required elements, and thus are evaluated as insufficient.</p>
<p>Charter holder indicated the intended purpose of the document was to demonstrate: the process for evaluating how the assessment system is aligned to the instructional methodology.</p> <p>The documents provided demonstrate evidence of the following:</p> <ul style="list-style-type: none"> Team Leads ensure instructional methodologies are aligned to curriculum calendars and academic rigor of assessments through the use of Unwrapped Documents. Assistant principals evaluate the weekly lesson plans to ensure formative and benchmark assessment tools are being utilized as well as daily assessments are aligned to the academic rigor of the formative and benchmark assessments. Re-teach/Enrich offers a school-wide approach to aligning assessment systems and instructional methodologies in math and reading. The process of Re-teach/Enrich takes place at the conclusion of each standard taught. Classroom teachers administer District Common Formative Assessments, to assess student comprehension of the recently completed standard. <p>Final Evaluation:</p>		
<p><input checked="" type="checkbox"/> Documents presented serve as detailed evidence of implementation of each of the relevant described processes, and thus are evaluated as sufficient.</p>		<p><input type="checkbox"/> Documents presented do not demonstrate evidence of implementation of processes to address the required elements, and thus are evaluated as insufficient.</p>

<ul style="list-style-type: none"> • Informal Observations • Formal Evaluations 		
<p>[A.B.1]</p> <p>Bottom 25</p> <ul style="list-style-type: none"> • Title I Intervention Schedule • Title I Student Progress Reports • Data Reflection Sheets • Child Find/Interventionist Concerns Form/Letter <p>ELL</p> <ul style="list-style-type: none"> • AZELLA • Galileo • Student Monitoring Form • Data Boards • BT Formative Assessments • ELL NEED Report • ELL 70 Report • ELL Binder of Assessment Information • ILLP Samples • ELL Data Boards • Data Reflection Forms <p>Students with Disabilities</p> <ul style="list-style-type: none"> • Special Education Student Progress Reports • Data Reflection Sheets • IEP Review Meeting Notice • IEP Review Meeting Notes <p>FRL</p> <ul style="list-style-type: none"> • 2015-2016 NCLB Report-Williams 	<p>Charter holder indicated the intended purpose of the document was to demonstrate: how the assessment system assesses each subgroup to determine the effectiveness of supplemental and/or differentiated instruction and curriculum.</p> <p>The documents provided demonstrate evidence of the following:</p> <ul style="list-style-type: none"> • Title I Interventionists are required to monitor the individual progress of students in which they are providing interventions. Interventionist and department heads identify patterns and trends seen for students in the bottom quartile. • All instructional staff working with ELL students will record benchmark results for the students they service in Data Reflection forms to develop relevant goals for instructional and curricular modifications. The district ELL coordinator then evaluates the current curriculum after every benchmark to assess whether specialized materials implemented by instructional staff were effective in helping ELL students meet the ACCR standards along with progress in specific standards. • Special Education Teachers are required to monitor the individual progress of students in which they are providing special education services. Formative and Benchmark assessments results are used to document growth and progress on individualized student progress reports. Teachers review Data Reflection forms that are completed by classroom teachers. Special Education teachers and the department head identify patterns and trends seen for students with disabilities. <p>Final Evaluation:</p>	
	<p><input checked="" type="checkbox"/> Documents presented serve as detailed evidence of implementation of each of the relevant described processes, and thus are evaluated as sufficient.</p>	<p><input type="checkbox"/> Documents presented do not demonstrate evidence of implementation of processes to address the required elements, and thus are evaluated as insufficient.</p>

<p>[A.C.1]</p> <ul style="list-style-type: none"> • Data Collection Sheets • Aggregated Multi-Test Reports • Grade-level Student Growth and Achievement • Custom Reports • Galileo Intervention Alerts • Development Profile Reports • Data Reflection Forms • DIBELS Benchmark Results • Professional Teacher Evaluation • Academic Intervention Plans • ILLP Samples • IEP Samples • Instructional Staff Evaluation • Student Progress Reports (Title I) • Data Dialogue Reflections 	<p>Charter holder indicated the intended purpose of the document was to demonstrate: the process for collecting and analyzing assessment data.</p> <p>The documents provided demonstrate evidence of the following:</p> <ul style="list-style-type: none"> • Formative assessment data is evaluated by teachers in weekly/biweekly intervals according to their grade level curriculum calendars and assessment scores are recorded in Data Collection Sheets at the conclusion of each standard taught. • Instructional staff analyzes benchmark assessment data in grade level PLC meetings, which occur monthly. School-wide and grade level data is provided by the data committee using multiple report in Galileo. • These classroom teachers, evaluate the results alongside BT formative reading proficiency data in grade level PLC meetings, which occur monthly. This data is reviewed and evaluated by all instructional staff and results are recorded in Data Reflection Forms • Title 1, ELL, and special education teachers work within their departments to meet the needs of the individual students they service based on formative and benchmark data. Academic Intervention Plans (which are created modified and reviewed through the Student Study Team), ILLPs, and IEPs are followed and records kept and updated as assessment results are collected and analyzed. Directors of these subgroups evaluate their instructional support staff in the Instructional Staff Evaluation. All instructional staff analyze benchmark results for the students they service and develop relevant goals for instructional intervention or modifications based on benchmark assessment data this is documented in Student Progress Reports. 	
	<p>Final Evaluation:</p> <p><input checked="" type="checkbox"/> Documents presented serve as detailed evidence of implementation of each of the relevant described processes, and thus are evaluated as sufficient.</p>	<p><input type="checkbox"/> Documents presented do not demonstrate evidence of implementation of processes to address the required elements, and thus are evaluated as insufficient.</p>

<p>[A.C.2]</p> <ul style="list-style-type: none"> • Data Collection Sheets • Data Reflection Sheets • Standards Alignment Checklists • Curriculum Calendar Revision Spreadsheet • Galileo Blueprint Revision Spreadsheet 	<p>Charter holder indicated the intended purpose of the document was to demonstrate: how the data analysis is used to make adjustments to curriculum.</p> <p>The documents provided demonstrate evidence of the following:</p> <ul style="list-style-type: none"> • Immediate and individual adjustments to curriculum are made by teachers and grade-level teams based on formative assessment data analysis found on the Data Collection Sheets as well as benchmark data analysis found on Data Reflection Sheets. • The teacher would discuss with her grade-level team her results and adjust instruction and intervention curriculum accordingly...the grade-level team can submit a revision for allotted instructional time to the data committee after further analysis of grade-level curriculum, instruction, and intervention. <p>Final Evaluation:</p>	
<p>[A.C.3]</p> <ul style="list-style-type: none"> • Off-site PD Certificates • Data Collection Sheets • Sample of documented ability groups for Reteach/Enrich • Data Reflection Sheets • PLC Meeting Forms • Teacher Improvement Forms • Teacher Mentor Roster • Online PD Certificated 	<p><input checked="" type="checkbox"/> Documents presented serve as detailed evidence of implementation of each of the relevant described processes, and thus are evaluated as sufficient.</p>	<p><input type="checkbox"/> Documents presented do not demonstrate evidence of implementation of processes to address the required elements, and thus are evaluated as insufficient.</p>
<p>Charter holder indicated the intended purpose of the document was to demonstrate: how the data analysis is used to make adjustments to instruction.</p> <p>The documents provided demonstrate evidence of the following:</p> <ul style="list-style-type: none"> • Grade-level teams analyze formative and benchmark assessment results to evaluate whether changes in instructional strategies can be made to improve student performance and teach the standards to mastery. District Formative Assessment results are evaluated by teaching teams weekly/biweekly using the Beyond Textbooks Data Collection Sheets to determine the effectiveness of current instructional strategies and assign teachers to ability groups for Reteach/Enrich. Teachers that produced the highest scores on the weekly formative assessment are assigned the lowest scoring intervention groups during Reteach/Enrich so that students who are struggling the most with the standard will receive the most effective remediation. • Additional measures are taken by administration, if a pattern for underperformance in a specific classroom or grade-level (i.e. Teacher Improvement Plan, Teacher Mentor Assignment and/or Required Online PD). <p>Final Evaluation:</p>		



<ul style="list-style-type: none">• Mentor Observation Forms• Collaboration Logs• Sample ILLP: Attachment B• Sample Special Education Progress Report• Additional PD Materials/Sign-ins	<p><input checked="" type="checkbox"/> Documents presented serve as detailed evidence of implementation of each of the relevant described processes, and thus are evaluated as sufficient.</p>	<p><input type="checkbox"/> Documents presented do not demonstrate evidence of implementation of processes to address the required elements, and thus are evaluated as insufficient.</p>
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Demonstration of Sufficient Progress Site Visit Inventory

Charter Holder Name: Heritage Elementary School
 School Name: Heritage Elementary School, Heritage Elementary
 Williams

Site Visit Date: May 16, 2016
 Required for: Renewal
 Evaluation Criteria Area: Monitoring Instruction

Document Name/Identification	Intended Purpose and Discussion Outcome		
<p>[M.A.1]</p> <ul style="list-style-type: none"> • Instructional Process Presentation • Welcome Week Agenda (with Breakout Sessions) • New Teacher induction Agenda • Instructional Staff Binders (w/ Expectations) • Lesson Plan Feedback Samples • Teacher Mentor Program PD Schedule • Peer Mentor Program Roster • Mentor Teacher Observation Forms • Collaboration Logs • Mentor Peer Coaching Completion Form • Informal Observation form (Classroom Teachers and Additional Instructional Staff) • Formal Evaluations (Classroom Teachers and 	<p>Charter holder indicated the intended purpose of the document was to demonstrate: the Charter Holder’s process for monitoring that instruction is aligned with ACCRS standards, implemented with fidelity, effective throughout the year, and addressing the identified needs of students in all four subgroups.</p> <p>The documents provided demonstrate evidence of the following:</p> <ul style="list-style-type: none"> • A copy of the Instructional Process Expectations and Presentation is placed in a binder provided to all instructional staff. These expectations are also reviewed by site principals with all returning instructional staff during individual grade-level breakout sessions. In addition, all instructional staff are provide training on Beyond Textbook 101 and 102 which provides an overview of curriculum calendars, unwrapped documents and common formative assessments. • A grade-level lesson plan is submitted to the administration team which includes standard-aligned objectives, daily and weekly assessment plans, instructional strategies as well as accommodations/modifications. Assistant principals evaluate the weekly lesson plans to ensure all 6 required components are present as well as ensure instructional strategies and delivery the content of the curriculum in the way that they were designed to be used and delivered. Feedback is then returned to teachers with suggestions for improvements or modifications for curriculum, instruction, assessment and/or intervention. • At the Williams site the principal provides email feedback to classroom teachers regarding lesson plans and classroom instruction. • During informal evaluations, administration and department heads monitor that instructional methodologies include effective implementation and strategies in areas for all students. Formal Teacher Evaluations are conducted twice a year by the principal in order to provide comprehensive feedback regarding all required teaching components to monitor the effectiveness of ACCR standards-based instruction. <p>Final Evaluation:</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; padding: 5px;"> <input checked="" type="checkbox"/> Documents presented serve as detailed evidence of implementation of each of the relevant described processes, and thus are evaluated as sufficient. </td> <td style="width: 50%; padding: 5px;"> <input type="checkbox"/> Documents presented do not demonstrate evidence of implementation of processes to address the required elements, and thus are evaluated as insufficient. </td> </tr> </table>	<input checked="" type="checkbox"/> Documents presented serve as detailed evidence of implementation of each of the relevant described processes, and thus are evaluated as sufficient.	<input type="checkbox"/> Documents presented do not demonstrate evidence of implementation of processes to address the required elements, and thus are evaluated as insufficient.
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<p>Additional Instructional Staff)</p> <ul style="list-style-type: none"> • Teacher Improvement Plan Sample • Online Certificate of Completion • Email feedback from Williams principal to teacher 		
<p>[M.A.2]</p> <ul style="list-style-type: none"> • Instructional Process Presentation • Welcome Week Agenda (with Breakout Sessions) • New Teacher induction Agenda • Instructional Staff Binders • Beyond Textbooks Curriculum Calendars • Data collection Sheets • Data Reflection Sheets • Sample of classroom ability groups (for Reteach/ Enrich) • Child Find Sample File • Lesson Plan Feedback Samples • Teacher Mentor Program PD Schedule • Peer Mentor Program Roster 	<p>Charter holder indicated the intended purpose of the document was to demonstrate: how does the Charter Holder monitor instruction to ensure it is leading all students to mastery of the standards.</p> <p>The documents provided demonstrate evidence of the following:</p> <ul style="list-style-type: none"> • Immediate and individual adjustments to instruction and curriculum are made by teachers and grade-level teams based on formative assessment data analysis found on the Data Collection Sheets as well as benchmark data analysis found on Data Reflection Sheets. Grade-level teams analyze formative and benchmark assessment results to evaluate whether changes in instructional strategies can be made to improve student performance and teach the standards to mastery. • Lesson Plan Feedback Forms are completed by assistant principals. Feedback is then returned to teachers with suggestions for improvements or modifications for curriculum, instruction, assessment and/or intervention. • Informal observations and formal evaluations of all instructional staff are conducted by principals, department heads, and assistant principals to ensure that the consistent alignment of the instructional process as well as the use effective instruction strategies for all students. • PLC data sheets are used by the teachers at the Williams site to monitor the effectiveness of instruction based on Galileo assessment results. Analysis identifies specific standards not mastered. Teachers identify action steps for modifying instruction to address identified areas. <p>Final Evaluation:</p>	
	<p><input checked="" type="checkbox"/> Documents presented serve as detailed evidence of implementation of each of the relevant described processes, and thus are evaluated as sufficient.</p>	<p><input type="checkbox"/> Documents presented do not demonstrate evidence of implementation of processes to address the required elements, and thus are evaluated as insufficient.</p>

<ul style="list-style-type: none"> • Mentor Teacher Observation Forms • Collaboration Logs • Mentor Peer Coaching Completion Form • Informal Observation form (Classroom Teachers and Additional Instructional Staff) • Formal Evaluations (Classroom Teachers and Additional Instructional Staff) • Teacher Improvement Plan Sample • Online Certificate of Completion 		
<p>[M.B.1]</p> <ul style="list-style-type: none"> • Lesson Plan Feedback Samples • Teacher Mentor Program PD Schedule • Peer Mentor Program Roster • Mentor Teacher Observation Forms • Collaboration Logs • Mentor Peer Coaching Completion Form • Informal Observation form 	<p>Charter holder indicated the intended purpose of the document was to demonstrate: the Charter Holder’s process for evaluating instructional practices of all staff.</p> <p>The documents provided demonstrate evidence of the following:</p> <ul style="list-style-type: none"> • Assistant principals evaluate the weekly lesson plans to ensure all 6 required components are present as well as ensure instructional strategies and delivery the content of the curriculum in the way that they were designed to be used and delivered. Lesson Plan Feedback Forms are completed by assistant principals. Feedback is then returned to teachers with suggestions for improvements or modifications for curriculum, instruction, assessment and/or intervention. • Informal observations and formal evaluations of all instructional staff are conducted by principals, department heads, and assistant principals to ensure that the consistent alignment of the instructional process as well as the use effective instruction strategies for all students. • At the Glendale site observation forms monitor classroom management strategies during the 1st quarter of the school year. For quarters 2-4 informal observations focus on classroom instruction and teaching strategies. 	

<p>(Classroom Teachers and Additional Instructional Staff)</p> <ul style="list-style-type: none"> • Formal Evaluations (Classroom Teachers and Additional Instructional Staff) • Teacher Improvement Plan Sample • Online Certificate of Completion 	<p>Final Evaluation:</p> <table border="1" style="width: 100%;"> <tr> <td style="width: 50%; vertical-align: top;"> <input checked="" type="checkbox"/> Documents presented serve as detailed evidence of implementation of each of the relevant described processes, and thus are evaluated as sufficient. </td> <td style="width: 50%; vertical-align: top;"> <input type="checkbox"/> Documents presented do not demonstrate evidence of implementation of processes to address the required elements, and thus are evaluated as insufficient. </td> </tr> </table>		<input checked="" type="checkbox"/> Documents presented serve as detailed evidence of implementation of each of the relevant described processes, and thus are evaluated as sufficient.	<input type="checkbox"/> Documents presented do not demonstrate evidence of implementation of processes to address the required elements, and thus are evaluated as insufficient.
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<p>[M.B.2]</p> <ul style="list-style-type: none"> • Lesson Plan Feedback Samples • Teacher Mentor Program PD Schedule • Mentor Teacher Observation Forms • Informal Observation form (Classroom Teachers and Additional Instructional Staff) • Formal Evaluations (Classroom Teachers and Additional Instructional Staff) 	<p>Charter holder indicated the intended purpose of the document was to demonstrate: the Charter Holder’s process to identify the quality of instruction.</p> <p>The documents provided demonstrate evidence of the following:</p> <ul style="list-style-type: none"> • The Charter Holder’s process for evaluating the quality of instruction involves checking for the presence of relevant instructional practices and methodologies within the lesson plans by conducting Lesson Plan Evaluations w/ feedback and ensuring that these practices are demonstrated in the classroom by conducting informal observations and formal evaluations. • Informal observations offer immediate feedback to teachers, and adjustments or modifications are recommended and followed up on by school administration. Peer Mentor observations are conducted quarterly, in order to collaboratively provide feedback for individual strengths of weakness of new or struggling instructional staff. • Formal Teacher Evaluations are conducted twice a year by the principal in order to provide comprehensive feedback regarding all required teaching components to monitor the effectiveness of ACCR standards-based instruction and improve the quality of teaching in all classrooms. <p>Final Evaluation:</p>			

<ul style="list-style-type: none"> • Evaluation Rubric • Pre-Evaluation Lesson Reflection • Post-Evaluation Conference Sign-up Sheets 	<input checked="" type="checkbox"/> Documents presented serve as detailed evidence of implementation of each of the relevant described processes, and thus are evaluated as sufficient.	<input type="checkbox"/> Documents presented do not demonstrate evidence of implementation of processes to address the required elements, and thus are evaluated as insufficient.
<p>[M.B.3]</p> <ul style="list-style-type: none"> • Informal Observation form (Classroom Teachers and Additional Instructional Staff) • Mentor Teacher Observation Forms • Collaboration Logs • Mentor Peer Coaching Completion Form • Formal Evaluations (Classroom Teachers and Additional Instructional Staff) • Evaluation Rubric • Post-Evaluation Conference Sign-up Sheets • Teacher Improvement Plan Sample • Instructional Staff Email Samples • Online Certificate of Completion 	<p>Charter holder indicated the intended purpose of the document was to demonstrate: how this process identifies individual strengths, weaknesses, and needs of instructional staff.</p> <p>The documents provided demonstrate evidence of the following:</p> <ul style="list-style-type: none"> • The process for evaluating individual strengths, weaknesses, and needs are established by providing consistent and detailed teacher feedback regarding both documented (lesson plans) and observable instructional practices. • As part of mentoring process teachers complete a self-assessment to identify perceived areas of strength. This is discussed with the mentor and discussed after the mentor has observed classroom instruction. • Evaluation rating and feedback are reviewed and discussed in a post-evaluation conference. During this time instructional staff are able to have dialogue with a site principal about observed strengths and weaknesses as well as create a plan for specific needs. <p>Final Evaluation:</p>	
	<input checked="" type="checkbox"/> Documents presented serve as detailed evidence of implementation of each of the relevant described processes, and thus are evaluated as sufficient.	<input type="checkbox"/> Documents presented do not demonstrate evidence of implementation of processes to address the required elements, and thus are evaluated as insufficient.

<p>[M.C.1]</p> <p>Bottom 25</p> <ul style="list-style-type: none"> • General Education Lesson Plan Submission Spreadsheet • Supplemental Lesson Plans • Lesson Plan Feedback • Instructional Staff/Interventionist Informal Observations • Instructional Staff/Interventionist Formal Evaluations • Additional PD Specialized for Subgroup <p>ELL</p> <ul style="list-style-type: none"> • ILLP Monitoring Form • Quarterly Subgroup Lesson Plan Evaluation Form • Child Find Meeting Notes • Informal Observations • Formal Evaluations • Additional PD Specialized for Subgroup 	<p>Charter holder indicated the intended purpose of the document was to demonstrate: the Charter Holder’s process to evaluate supplemental instruction that is targeted to address the needs of students in all four subgroups.</p> <p>The documents provided demonstrate evidence of the following:</p> <ul style="list-style-type: none"> • Interventionists are then required to submit supplemental lesson plans to the Title I Director. Director then provides Lesson Plan Feedback. Classroom informal observations and formal evaluations conducted by Title I Director for Interventionist. • ELL Site Coordinator evaluates teacher lesson plans to ensure that the ELP Standards, the ILLPs, and the Progress reports match and are showing growth. Teacher’s lesson plans must contain which Performance Indicators from the ILLP will be used to differentiate the instruction for the student. The ELL Site Coordinator ensures that the ILLP implementation process is being completed and updated quarterly by completing the ILLP Monitoring form. • ILLP monitoring forms track student data and progress. Informal observations capture monitoring instruction for ELLs through the use of the Student Understanding matches objective component of the form. • Supplementary instruction is evaluated using progress reports, classroom informal observations, and formal evaluations conducted by administration for teachers and the Title I Director for Interventionist. • The special education director monitors the progress of students in Special Education after each quarterly benchmark and/or department progress reports. It is during this time the director assesses whether the specific supplemental instruction implemented both by general education and special education staff was effective in helping students with disabilities meet or show growth on the ACCR standards based on individual abilities. • All instructional staff working with students with disabilities are evaluated by the site administration and department heads for providing appropriate supplemental instruction through informal observations and formal observations. <p>Final Evaluation:</p>
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<p>Students with Disabilities</p> <ul style="list-style-type: none"> • General Education Lesson Plan Submission Spreadsheet • IEP Reviews • IEP Review Meeting Notes • Collaboration Conference Meeting Notes • Informal Observations • Formal Evaluations • Action Plan Samples via email • Additional PD Specialized for Subgroup <p>FRL</p> <ul style="list-style-type: none"> • 2015-2016 NCLB Report-Williams 	<p><input checked="" type="checkbox"/> Documents presented serve as detailed evidence of implementation of each of the relevant described processes, and thus are evaluated as sufficient.</p>	<p><input type="checkbox"/> Documents presented do not demonstrate evidence of implementation of processes to address the required elements, and thus are evaluated as insufficient.</p>
<p>[M.D.1]</p> <ul style="list-style-type: none"> • Informal Observation form (Classroom Teachers and Additional Instructional Staff) • Classroom Walk-through Forms • Mentor Teacher Observation Samples • Pre-Evaluation Lesson Reflection Forms • Formal Evaluations 	<p>Charter holder indicated the intended purpose of the document was to demonstrate: how the Charter Holder analyzes information about strengths, weaknesses, and needs of instructional staff.</p> <p>The documents provided demonstrate evidence of the following:</p> <ul style="list-style-type: none"> • Teacher evaluations and informal observations, and peer mentor documents, are reviewed by school administration to identify trends. • Reflection feedback forms collect teacher input regarding instruction and support for students in subgroups. • Professional development and other teacher supports are provided based on identified trends in classroom observations. In late November a list of classroom management strategies were shared with teachers based on an observed trend in information observations. • Staff Meeting agenda includes topics based on informal observations <p>Final Evaluation:</p>	

<p>(Classroom Teachers and Additional Instructional Staff)</p> <ul style="list-style-type: none"> • Evaluation Rubric • Post-Evaluation Conference Sign-up Sheets • Annual Needs Assessments • Teacher Reflection Feedback Samples • Staff Meeting Agenda Samples 	<p><input checked="" type="checkbox"/> Documents presented serve as detailed evidence of implementation of each of the relevant described processes, and thus are evaluated as sufficient.</p>	<p><input type="checkbox"/> Documents presented do not demonstrate evidence of implementation of processes to address the required elements, and thus are evaluated as insufficient.</p>
<p>[M.D.2]</p> <ul style="list-style-type: none"> • Informal Observation form (Classroom Teachers and Additional Instructional Staff) • Classroom Walk-through Forms • Pre-Evaluation Lesson Reflection Forms • Teacher Development/ Improvement Plan Sample • Staff Meeting Agendas Samples • Instructional Staff Email Samples • Administrative School Stipend Sample (for trainer) • Formal Evaluations 	<p>Charter holder indicated the intended purpose of the document was to demonstrate: how the Charter Holder uses the analysis to provide feedback on strengths, weaknesses, and learning needs based on the evaluation of instructional practices.</p> <p>The documents provided demonstrate evidence of the following:</p> <ul style="list-style-type: none"> • An evaluation rating along with feedback to teachers in areas of planning and preparation, instruction, classroom environment, data/student performance and professional responsibilities. Ratings are based on cited evidence (quantitative and observable) and align to an evaluation rubric. • Evaluation rating and feedback are reviewed and discussed in a post-evaluation conference. During this time instructional staff are able to have a dialogue with site principal about observed strengths and weaknesses as well as create a plan for specific needs. • When the quality of instruction is low, the school administration responds with a clear action plan for teachers that will redefine or clarify instructional expectations. If a pattern of ineffective instruction is seen, it is documented through Teacher Improvement Plan, Teacher Mentor Assignment, Staff Meeting Agendas, Instructional Staff Emails and/or Required Additional PD. • Teacher Mentors will be followed up with debriefing sessions to allow opportunities for further discussion and professional recommendations. These meetings are documents through observation follow-up emails, collaboration assessment logs, and/or Mentor Peer Coaching Completion Form Post conferences accompany every formal evaluation to open a more extensive dialogue between teachers and administrators. <p>Final Evaluation:</p>	



<p>(Classroom Teachers and Additional Instructional Staff)</p> <ul style="list-style-type: none">• Evaluation Rubric• Post-Evaluation Conference Sign-up Sheets• Mentor Teacher Observation Samples• Mentor Peer Coaching Completion Form• Collaboration Assessment Log Samples	<p><input checked="" type="checkbox"/> Documents presented serve as detailed evidence of implementation of each of the relevant described processes, and thus are evaluated as sufficient.</p>	<p><input type="checkbox"/> Documents presented do not demonstrate evidence of implementation of processes to address the required elements, and thus are evaluated as insufficient.</p>
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Demonstration of Sufficient Progress Site Visit Inventory

Charter Holder Name: Heritage Elementary School
 School Name: Heritage Elementary School, Heritage Elementary
 Williams

Site Visit Date: May 16, 2016
 Required for: Renewal
 Evaluation Criteria Area: Professional Development

Document Name/Identification	Intended Purpose and Discussion Outcome		
<p>[P.A.1]</p> <ul style="list-style-type: none"> • Professional Development teacher Survey • PD Survey Results • Comprehensive Development Calendar • Professional Development Calendar • Master Calendar • Additional Professional Development Survey Samples • Teacher Mentor Program (TMP) Event Calendar • TMP PD Presentation Samples 	<p>Charter holder indicated the intended purpose of the document was to demonstrate: the Charter Holder’s process to determine what professional development topics will be covered throughout the year, and the data and analysis used to make those decisions.</p> <p>The documents provided demonstrate evidence of the following:</p> <ul style="list-style-type: none"> • At the conclusion of the year, all instructional staff are given a survey of a variety of possible professional developments for the following school year; survey results are then aggregated to determine the highest preference from instructional staff. Then, a comprehensive Needs Assessment is conducted at the beginning of each school year to determine the professional development needs of instructional staff at each grade level. Administration and department heads analyze the results of the Needs Assessment and identify the site-specific needs of instructional staff. The site principals also evaluate data taken from walkthrough observations and professional teacher evaluations to identify specific areas in which teachers have shown a consistent need for improvement. • Administration conducts Professional development surveys throughout the school year to determine whether teachers are in need of additional training in specific areas that have not been identified or addressed. When instructional needs arise for additional professional development that has not been scheduled within the current Professional Development Calendars, instructional staff in need of this training will attend off-site professional development trainings. • The Teacher Mentor Program also provides additional professional development and for incoming staff or those needing additional support of effective instructional strategies. <p>Final Evaluation:</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; padding: 5px;"> <input checked="" type="checkbox"/> Documents presented serve as detailed evidence of implementation of each of the relevant described processes, and thus are evaluated as sufficient. </td> <td style="width: 50%; padding: 5px;"> <input type="checkbox"/> Documents presented do not demonstrate evidence of implementation of processes to address the required elements, and thus are evaluated as insufficient. </td> </tr> </table>	<input checked="" type="checkbox"/> Documents presented serve as detailed evidence of implementation of each of the relevant described processes, and thus are evaluated as sufficient.	<input type="checkbox"/> Documents presented do not demonstrate evidence of implementation of processes to address the required elements, and thus are evaluated as insufficient.
<input checked="" type="checkbox"/> Documents presented serve as detailed evidence of implementation of each of the relevant described processes, and thus are evaluated as sufficient.	<input type="checkbox"/> Documents presented do not demonstrate evidence of implementation of processes to address the required elements, and thus are evaluated as insufficient.		
<p>[P.A.2]</p> <ul style="list-style-type: none"> • Professional Development teacher Survey • PD Survey Results 	<p>Charter holder indicated the intended purpose of the document was to demonstrate: that Charter Holder’s process to ensure the professional development plan is aligned with instructional staff learning needs.</p> <p>The documents provided demonstrate evidence of the following:</p> <ul style="list-style-type: none"> • All professional development for the 2015-2016 school year has been aligned to the learning needs of instructional staff in accordance with the results of the Comprehensive Needs Assessment and Professional 		

<ul style="list-style-type: none"> • Comprehensive Needs Assessment • Professional Development Calendar • Master Calendar • Additional Professional Development Survey Samples • Teacher Mentor Program (TMP) Event Calendar • Mentor Teacher Emails (for changes/additions to PD) • TMP PD Presentation Samples • Collaboration Logs • Coaching Completion Form 	<p>Development Teacher Survey.</p> <ul style="list-style-type: none"> • The Mentor Teachers and Team Leads will communicate with site principals throughout the school year to arrange for any additional professional development trainings that are aligned to the needs of teachers as they arise. • The Teacher Mentor Program also provides additional professional development and for incoming staff or those needing additional support of effective instructional strategies. <p>Final Evaluation:</p>	
<p>[P.A.3]</p> <ul style="list-style-type: none"> • Professional Development teacher Survey • PD Survey Results • Comprehensive Development Calendar • Additional Professional Development Survey Samples • Informal Observations • Formal Teacher Evaluations • Professional Development Calendar 	<p>Charter holder indicated the intended purpose of the document was to demonstrate: the process to determine and address the areas of high importance in the professional development plan.</p> <p>The documents provided demonstrate evidence of the following:</p> <ul style="list-style-type: none"> • Identified by the Needs Assessment and Teacher PD Survey results. • Additional professional development needs will be identified by additional data collected by principals/department heads from teacher surveys, informal observations, and Professional Teacher Evaluations. • Areas of High Importance for the Williams campus were determined based on ADE requirements for their Focus and Priority Status. <p>Final Evaluation:</p>	<p><input type="checkbox"/> Documents presented do not demonstrate evidence of implementation of processes to address the required elements, and thus are evaluated as insufficient.</p>
	<p><input checked="" type="checkbox"/> Documents presented serve as detailed evidence of implementation of each of the relevant described processes, and thus are evaluated as sufficient.</p>	<p><input type="checkbox"/> Documents presented do not demonstrate evidence of implementation of processes to address the required elements, and thus are evaluated as insufficient.</p>

<p>[P.B.1]</p> <ul style="list-style-type: none"> • Welcome Week Agenda • In-house Specialized PD Sign-in Sheets (for all subgroups) • Data Reflection Forms • Monthly Reading Trainings RSVP's via email • Off-site Professional Development Certificates of Completion • Professional Development Calendar 	<p>Charter holder indicated the intended purpose of the document was to demonstrate: how the charter holder provides professional development to ensure instructional staff is able to address the needs of students in all four subgroups.</p> <p>The documents provided demonstrate evidence of the following:</p> <ul style="list-style-type: none"> • School-wide on-site, and specialized off-site training for all instructional staff members who work with these student populations. Additional in-house training is provided for instructional staff working with each of the subgroup student populations by department heads and administration at the beginning of the year during the Welcome Week for all instructional Staff as well as throughout the year. A specialized Child Find/RTI training to all instructional staff at the beginning of the year as well. • Title I, Special Education, and ELL Departments attended monthly specialized reading professional developments. • The director of federal programs provides professional development in instructional strategies that enhance the teaching practices of all staff working with students in each of the subgroups. <p>Final Evaluation:</p>	
<p>[P.C.1]</p> <ul style="list-style-type: none"> • Classroom Strategy Checklist • Staff Surveys and Results • In-house PD Sign-in Sheets • Classroom Walkthroughs • Support Book Order/Invoices • Off-site Professional Development Certificates of Completion • Professional Development Implementation Walkthroughs 	<p>Charter holder indicated the intended purpose of the document was to demonstrate: the Charter Holder's process to provide support to the instructional staff on the high quality implementation of the strategies learned in professional development.</p> <p>The documents provided demonstrate evidence of the following:</p> <ul style="list-style-type: none"> • Staff members are given a Strategy Checklist at the beginning of every professional development. This form allows teacher to document ideas, resources and strategies from specific professional developments. On this form teachers are also able to conduct a short reflection of the implementation of the strategies, resources and ideas in their classroom. As a result, teachers are able to self-monitor and make immediate adjustments in their classroom. • If there is a large need for additional training, a follow-up session will be scheduled for all instructional staff or utilizing the Mentor Teacher Program. • Once a majority of staff members feel comfortable with implementing the instruction, administration will follow-up with Classroom Walkthroughs to determine the quality of implementation in the classroom along with providing feedback to individual instructional staff. <p>Final Evaluation:</p>	
	<p><input checked="" type="checkbox"/> Documents presented serve as detailed evidence of implementation of each of the relevant described processes, and thus are evaluated as sufficient.</p>	<p><input type="checkbox"/> Documents presented do not demonstrate evidence of implementation of processes to address the required elements, and thus are evaluated as insufficient.</p>

<p>[P.C.2]</p> <ul style="list-style-type: none"> Professional Development Calendar Professional Development Supply Spreadsheet Purchase Request Form Administrative Stipends 	<p>Charter holder indicated the intended purpose of the document was to demonstrate: how the Charter Holder identifies the resources that are necessary for high quality implementation.</p> <p>The documents provided demonstrate evidence of the following:</p> <ul style="list-style-type: none"> Once the Professional Development Calendar is finalized at the beginning of the year, administration, department heads and mentor teachers meet to create a Professional Development Supply Spreadsheet. This spreadsheet includes materials that will be needs to ensure high quality training and implementation of professional developments. Changes are made based on the professional developments and requests from department heads and mentor teachers. Requests are documented through a Purchase Request Form and approved by administration. <p>Final Evaluation:</p>	
<p>[P.D.1]</p> <ul style="list-style-type: none"> Classroom Strategy Checklist Sample Staff Surveys and Results Classroom Walkthroughs Informal Observations 	<p>Charter holder indicated the intended purpose of the document was to demonstrate: how the Charter Holder monitors the implementation of the strategies learned in professional development sessions.</p> <p>The documents provided demonstrate evidence of the following:</p> <ul style="list-style-type: none"> Staff members are given a Strategy Checklist at the beginning of every professional development. This form allows teacher to document ideas, resources and strategies from specific professional developments. On this form teachers are also able to conduct a short reflection of the implementation of the strategies, resources and ideas in their classroom. As a result, teachers are able to self-monitor and make immediate adjustments in their classroom. Once a majority of staff members feel comfortable with implementing the instruction, administration will follow-up with Classroom Walkthroughs to determine the quality of implementation in the classroom along with providing feedback to individual instructional staff. Site principals and assistant principals continue to monitor the implementation of newly adopted instructional strategies by conducting informal observations throughout the year. <p>Final Evaluation:</p>	
	<input checked="" type="checkbox"/> Documents presented serve as detailed evidence of implementation of each of the relevant described processes, and thus are evaluated as sufficient.	<input type="checkbox"/> Documents presented do not demonstrate evidence of implementation of processes to address the required elements, and thus are evaluated as insufficient.

<p>[P.D.2]</p> <ul style="list-style-type: none"> • Sample Staff Surveys and Results • Classroom Walkthroughs • Informal Observations • Teacher Improvement Plans • Certificate of Completion (Online PD) 	<p>Charter holder indicated the intended purpose of the document was to demonstrate: how the Charter Holder monitors and follows-up with instructional staff regarding implementation of the strategies learned in professional development.</p> <p>The documents provided demonstrate evidence of the following:</p> <ul style="list-style-type: none"> • A staff survey is also conducted at the end of every professional development to determine staffs comfort level in implementing new methodologies and strategies. Results are then shared with staff at the following staff meeting. • Site principals and assistant principals continue to monitor the implementation of newly adopted instructional strategies by conducting informal observations throughout the year. • Individuals who require additional resources and training based on informal observations will meet with administration to create a plan of action. Action plans created with administration may include a Teacher Improvement Plan, Teacher Mentor Assignment, and/or Required Online PD. <p>Final Evaluation:</p>	
	<p><input checked="" type="checkbox"/> Documents presented serve as detailed evidence of implementation of each of the relevant described processes, and thus are evaluated as sufficient.</p>	<p><input type="checkbox"/> Documents presented do not demonstrate evidence of implementation of processes to address the required elements, and thus are evaluated as insufficient.</p>

APPENDIX E
RENEWAL DSP SUBMISSION



DEMONSTRATION OF SUFFICIENT PROGRESS REPORT

CHARTER INFORMATION

Charter Holder Name	Heritage Elementary School	Schools	Heritage Elementary- Williams Heritage Elementary School- Glendale
Charter Holder Entity ID	81076	Dashboard Year	FY15
Submission Date	April 21, 2016	Purpose of DSP Submission	Renewal

DSP CHECKLIST

- Review DSP Guide for Charter Holders, DSP Evaluation Criteria, and Charter Holder Academic dashboard.
- Determine if the Charter Holder is exempt or waived from any of the measures.
- Determine if Graduation Rate and/or Academic Persistence must be addressed in the plan.
- Complete the Charter Holder Information.
- Complete Area I: Data of the DSP Report Template.
- Complete the Data Submission Spreadsheet and prepare accompanying source data.
- Provide complete answers for each area (Curriculum, Assessment, Monitoring Instruction, and Professional Development, as well as Graduation Rate and Academic Persistence if applicable).
- Save files as directed in the DSP Guide for Charter Holders.
- Submit DSP by the deadline date described in the notification letter.



Demonstration of Sufficient Progress Report

AREA I: DATA

Complete the table below. Identify the school’s Academic Dashboard Rating for the two most recent available dashboards. Then, identify the data required with this DSP report. See the DSP Guide for Charter Holders for further instructions.

Charter Holders with multiple schools must complete the Data area for each school that received an Overall Rating of “Does Not Meet”, “Falls Far Below” or “No Rating” on the current Academic Dashboard. **The Charter Holder must copy and paste the Dashboard Ratings table for each school.**

Dashboard Ratings for All Measures			
School Name: Heritage Elementary- Williams			
Measure	Prior Year Dashboard	Current Year Dashboard	Data Required (any measure that did not meet/exceed for both years)
	School Rating	School Rating	
Student Median Growth Percentile (SGP)—Math	Meets	Meets	No
Student Median Growth Percentile (SGP)—Reading	Does Not Meet	Does Not Meet	Yes
Student Median Growth Percentile (SGP), Bottom 25%—Math (Traditional and Small Schools Only)	Does Not Meet	No Rating	Yes
Student Median Growth Percentile (SGP), Bottom 25%—Reading (Traditional and Small Schools Only)	Meets	No Rating	Yes
Improvement—Math (Alternative High Schools Only)	Not Applicable	Not Applicable	Not Applicable
Improvement—Reading (Alternative High Schools Only)	Not Applicable	Not Applicable	Not Applicable
Percent Passing—Math	Does Not Meet	Does Not Meet	Yes
Percent Passing—Reading	Does Not Meet	Does Not Meet	Yes
Subgroup, ELL—Math	Does Not Meet	No Rating	Yes
Subgroup, ELL—Reading	Meets	No Rating	Yes
Subgroup, FRL—Math	Does Not Meet	Does Not Meet	Yes
Subgroup, FRL—Reading	Does Not Meet	Does Not Meet	Yes
Subgroup, students with disabilities—Math	Does Not Meet	No Rating	Yes
Subgroup, students with disabilities—Reading	Does Not Meet	No Rating	Yes
High School Graduation Rate (High Schools Only)	Not Applicable	Not Applicable	Not Applicable
Academic Persistence (Alternative Schools Only)	Not Applicable	Not Applicable	Not Applicable

For **each school** with identified data submission requirements as identified above, the Charter Holder must submit a Data Submission Spreadsheet and accompanying source data. The Data Submission Spreadsheet(s) must accompany the DSP Report submission. Refer to the DSP Guide for Charter Holders for further instructions on the spreadsheet and the source data documentation that must accompany it.



Demonstration of Sufficient Progress Report

Complete the table below. Identify the school's internal benchmarking data for math and reading, as it relates to the source data and the data provided on the Data Submission Spreadsheet, and describe how that data is **valid** and **reliable**. (See Terms to Know in the DSP Guide for Charter Holders)

DATA TABLE 1

Assessment	Assessment Tool	Notes
Internal Benchmarking data has been disaggregated for READING from:	Galileo	Benchmark testing is used in grade 2-8
Internal Benchmarking data has been disaggregated for MATH from:	Galileo	Benchmark testing is used in grade 2-8
High School Graduation Rate	Not Applicable	Not Applicable
Academic Persistence	Not Applicable	Not Applicable

VALID and RELIABLE DATA

Explain how the Charter Holder has verified that the data provided is a **valid** and **reliable** indicator for each measure on the Academic Dashboard that does not meet the Board's standards.

Galileo has been chosen as valid and reliable source of data because it measures the intended student growth and proficiency within the school while comparing student performance across the state. Galileo also provides consistent and stable results for each benchmark and while comparing year to year data. Each benchmark is aligned with both the Arizona State Standards along with the school curriculum calendar. This curriculum calendar is also aligned with several other entities (both charter, private and traditional public) across the state through a partnership with Beyond Textbooks. A percentile rank is then generated based on the state distribution of all students inside of Galileo for specific grades and tested content areas. This percentile rank is also based off of individual item statistics which are all taken and then analyzed by Galileo. This analysis is done over the course of several years allowing the data to be consistent. This consistency and stability also carries over from state assessments because it is aligned to state standards while comparing student percentile rank to other students across the state on the same measures. This percentile rank is not specific for only students directly at our site. As a result, this percentile rank allows each site to measure students' relative position to all students in the state that use Galileo. Students reaching the 50th percentile or greater are considered to be on grade-level and overall proficient. However, each site also has the capability to take a more in depth analysis of specific student performance with the newly alignment to AZMerit performance level. These development levels have only recently been aligned and cannot be compared with a prior year due to lack of data available.

Therefore, for the purpose of this report, each site has determined to use the percentile rank to provide a consistent and valid source of data that can be compared over time and for multiple years.



Students reaching the 50th percentile or higher will be categorized as proficient and marked under “Meets” or “MS.” Students below the 50th percentile will be categorized as not proficient and be marked under “Approaches” or “AS” based on the dichotomous variable that is created when using the percentile rank.

Complete the table below. For each measure, provide the following information:

1. HOW the data was analyzed:
 - a. Which data was used?
 - b. What criteria were used in the process?
2. WHAT conclusions were drawn from the analysis?
 - a. What trends were identified? (Incorporate declines and improvement)
 - b. How did the data identify gaps in curriculum and/or instruction?
 - c. What other factors are evident based upon the analysis?

For more information on each of the measures, refer to the Academic Performance Framework and Guidance Document. The information provided below must be in relation to data provided on the Data Submission Spreadsheet and the accompanying source data.

DATA TABLE 2

Assessment Measure	HOW the data was analyzed	WHAT conclusions were drawn
Student Median Growth Percentile (SGP)— Math	Data Not Required	Data Not Required
Student Median Growth Percentile (SGP)— Reading	A Custom Test Report was created in order to allow the site to export a single file containing data from multiple tests and grade-levels. It is in this report that the site can select specific fields including percentile rank, development score and specific subgroup categories (i.e. ELL, SPED, FRL, and Bottom 25%). The data is then aggregated into an excel spreadsheet where the growth % rate is determined by taking the total number of students meeting growth (50 percentile or higher) and dividing it by the total number of students tested. This is done for each specific benchmark and content area.	At the end of 2014-2015, we identified math as the area with the most needs. We had felt the math was our least proficient area, and can be seen through our growth in math. However, after looking at our data throughout the 2015-2016 year, we realized we needed to reassess our approach with reading to also continue to grow those students at an acceptable rate similar to our math students.
Student Median Growth Percentile (SGP) Bottom 25%/Improvement— Math	A Custom Test Report was created in order to allow the site to export a single file containing data from multiple tests and grade-levels. It is in	Similar to our whole school data, we realized at the end of 2014-2015 that math was a significant area of concern with our bottom



Demonstration of Sufficient Progress Report

this report that the site can select specific fields including percentile rank, development score and specific subgroup categories (i.e. ELL, SPED, FRL, and Bottom 25%). The data is then aggregated into an excel spreadsheet where the growth % rate is determined by taking the total number of students meeting growth (50 percentile or higher) and dividing it by the total number of students tested. This is done for each specific benchmark and content area.

Student Median Growth Percentile (SGP) Bottom 25%/Improvement—
Reading

A **Custom Test Report** was created in order to allow the site to export a single file containing data from multiple tests and grade-levels. It is in this report that the site can select specific fields including percentile rank, development score and specific subgroup categories (i.e. ELL, SPED, FRL, and Bottom 25%). The data is then aggregated into an excel spreadsheet where the growth % rate is determined by taking the total number of students meeting growth (50 percentile or higher) and dividing it by the total number of students tested. This is done for each specific benchmark and content area.

We were able to increase growth in math from the 2014-2015 school year to the 2015-2016 school year, however, moving forward, we again lost the ELA focus because the 2015-2016 year our main concern was our math growth. In both years we were able to increase growth from beginning benchmark to end benchmark.

Percent Passing—**Math**

A **Custom Test Report** was created in order to allow the site to export a single file containing data from multiple tests and grade-levels. It is in this report that the site can select specific fields including percentile rank, development score and specific subgroup categories (i.e. ELL, SPED, FRL, and Bottom 25%). The data is then aggregated into an excel spreadsheet where the proficiency is determined by total number of students reaching the 50 percentile or higher. This is done for each specific benchmark and content area.

In our school wide data, we were able to increase our schoolwide percent passing in math from 38% at the end of the 2014-2015 school year to 58% at the 3rd benchmark of 2015-2016. This was because we were more focused on Math for the 2015-2016 school year, had a solid curriculum calendar to follow that maintained the teacher’s pace to make sure all standards were covered in a timely manner.

Percent Passing—**Reading**

A **Custom Test Report** was created in order to allow the site to export a single file containing data from multiple tests and grade-levels. It is in this report that the site can select specific fields including percentile rank, development score and specific subgroup categories (i.e. ELL, SPED, FRL, and Bottom 25%). The data is then aggregated into an excel spreadsheet where the proficiency is determined by total number of students

Despite increasing the percentage passing in the 2015-2016 year (by 20% in that school year), we didn’t make significant gains from the 2014-2015 to 2015-2016 year, yet did see an increase of 14% from the beginning to the 3rd benchmark in the current school year. This was due to being focused on math for the 2015-



Demonstration of Sufficient Progress Report

reaching the 50 percentile or higher. This is done for each specific benchmark and content area. **2016, and our intervention groups and after school tutoring were all math-based.**

Subgroup, ELL—Math

A **Custom Test Report** was created in order to allow the site to export a single file containing data from multiple tests and grade-levels. It is in this report that the site can select specific fields including percentile rank, development score and specific subgroup categories (i.e. ELL, SPED, FRL, and Bottom 25%). The data is then aggregated into an excel spreadsheet where the proficiency is determined by total number of students reaching the 50 percentile or higher. This is done for each specific subgroup, benchmark and content area.

Our 2014-2015 data in math for our ELL subgroup showed that none of the ELL students were proficient in Math. They were then part of the intense math intervention and after school math tutoring we put into place for the 2015-2016 school year. The percentage passing math by our 3rd benchmark for the 2015-2016 school year showed an increase of 43% of this subgroup being proficient.

Subgroup, ELL—Reading

A **Custom Test Report** was created in order to allow the site to export a single file containing data from multiple tests and grade-levels. It is in this report that the site can select specific fields including percentile rank, development score and specific subgroup categories (i.e. ELL, SPED, FRL, and Bottom 25%). The data is then aggregated into an excel spreadsheet where the proficiency is determined by total number of students reaching the 50 percentile or higher. This is done for each specific subgroup, benchmark and content area.

Our percentage passing in Reading for our ELL subgroup did increase from 2014-2015 to 2015-2016 by 4%, and we expect it to improve even more in the upcoming year. This is due to some ELL specific reading and writing intervention groups that we put into place during the 2015-2016 school year.

Subgroup, FRL—Math

A **Custom Test Report** was created in order to allow the site to export a single file containing data from multiple tests and grade-levels. It is in this report that the site can select specific fields including percentile rank, development score and specific subgroup categories (i.e. ELL, SPED, FRL, and Bottom 25%). The data is then aggregated into an excel spreadsheet where the proficiency is determined by total number of students reaching the 50 percentile or higher. This is done for each specific subgroup, benchmark and content area.

The subgroup of FRL is over 65% of the school population. Therefore trends and patterns of data mirror those of the general population. Overall trends for this subcategory are in alignment with percent passing analysis.

Subgroup, FRL—Reading

A **Custom Test Report** was created in order to allow the site to export a single file containing data from multiple tests and grade-levels. It is in this report that the site can select specific fields

The subgroup of FRL is over 65% of the school population. Therefore trends and patterns of data mirror those of the general population.



Demonstration of Sufficient Progress Report

	<p>including percentile rank, development score and specific subgroup categories (i.e. ELL, SPED, FRL, and Bottom 25%). The data is then aggregated into an excel spreadsheet where the proficiency is determined by total number of students reaching the 50 percentile or higher. This is done for each specific subgroup, benchmark and content area.</p>	<p>Overall trends for this subcategory are in alignment with percent passing analysis.</p>
<p>Subgroup, students with disabilities—Math</p>	<p>A Custom Test Report was created in order to allow the site to export a single file containing data from multiple tests and grade-levels. It is in this report that the site can select specific fields including percentile rank, development score and specific subgroup categories (i.e. ELL, SPED, FRL, and Bottom 25%). The data is then aggregated into an excel spreadsheet where the proficiency is determined by total number of students reaching the 50 percentile or higher. This is done for each specific subgroup, benchmark and content area.</p>	<p>Our percentage passing in math did increase slightly from 2014-2015 to 2015-2106. Most of our students with disabilities population is also part of our lowest 25% population and therefore were a part of the intervention groups during school and in our after school math tutoring groups.</p>
<p>Subgroup, students with disabilities—Reading</p>	<p>A Custom Test Report was created in order to allow the site to export a single file containing data from multiple tests and grade-levels. It is in this report that the site can select specific fields including percentile rank, development score and specific subgroup categories (i.e. ELL, SPED, FRL, and Bottom 25%). The data is then aggregated into an excel spreadsheet where the proficiency is determined by total number of students reaching the 50 percentile or higher. This is done for each specific subgroup, benchmark and content area.</p>	<p>Our percentage passing in reading remained the same from 2014-2015 to 2015-2016. Our focus in 2015-2016 was in math, and our intervention groups and after school tutoring were all math-based.</p>
<p>High School Graduation Rate (Schools serving 12th grade only)</p>	<p>Not Applicable</p>	<p>Not Applicable</p>
<p>Academic Persistence (Alternative High Schools Only)</p>	<p>Not Applicable</p>	<p>Not Applicable</p>



Demonstration of Sufficient Progress Report

Dashboard Ratings for All Measures			
School Name: Heritage Elementary School- Glendale			
Measure	Prior Year Dashboard	Current Year Dashboard	Data Required (any measure that did not meet/exceed for both years)
	School Rating	School Rating	
Student Median Growth Percentile (SGP)—Math	Does Not Meet	Meets	Yes
Student Median Growth Percentile (SGP)—Reading	Does Not Meet	Does Not Meet	Yes
Student Median Growth Percentile (SGP), Bottom 25%—Math (<i>Traditional and Small Schools Only</i>)	Does Not Meet	Meets	Yes
Student Median Growth Percentile (SGP), Bottom 25%—Reading (<i>Traditional and Small Schools Only</i>)	Does Not Meet	Meets	Yes
Improvement—Math (<i>Alternative High Schools Only</i>)	Not Applicable	Not Applicable	Not Applicable
Improvement—Reading (<i>Alternative High Schools Only</i>)	Not Applicable	Not Applicable	Not Applicable
Percent Passing—Math	Falls Far Below	Does Not Meet	Yes
Percent Passing—Reading	Falls Far Below	Does Not Meet	Yes
Subgroup, ELL—Math	Does Not Meet	Meets	Yes
Subgroup, ELL—Reading	Falls Far Below	Meets	Yes
Subgroup, FRL—Math	Falls Far Below	Meets	Yes
Subgroup, FRL—Reading	Falls Far Below	Does Not Meet	Yes
Subgroup, students with disabilities—Math	Does Not Meet	Does Not Meet	Yes
Subgroup, students with disabilities—Reading	Does Not Meet	Does Not Meet	Yes
High School Graduation Rate (<i>High Schools Only</i>)	Not Applicable	Not Applicable	Not Applicable
Academic Persistence (<i>Alternative Schools Only</i>)	Not Applicable	Not Applicable	Not Applicable

DATA TABLE 1

Assessment	Assessment Tool	Notes
Internal Benchmarking data has been disaggregated for READING from:	Galileo	Benchmark testing is used in grade 2-8
Internal Benchmarking data has been disaggregated for MATH from:	Galileo	Benchmark testing is used in grade 2-8
High School Graduation Rate	Not Applicable	Not Applicable
Academic Persistence	Not Applicable	Not Applicable



VALID and RELIABLE DATA

Explain how the Charter Holder has verified that the data provided is a **valid** and **reliable** indicator for each measure on the Academic Dashboard that does not meet the Board’s standards.

Galileo has been chosen as valid and reliable source of data because it measures the intended student growth and proficiency within the school while comparing student performance across the state. Galileo also provides consistent and stable results for each benchmark and while comparing year to year data. Each benchmark is aligned with both the Arizona State Standards along with the school curriculum calendar. This curriculum calendar is also aligned with several other entities (both charter, private and traditional public) across the state through a partnership with Beyond Textbooks. A percentile rank is then generated based on the state distribution of all students inside of Galileo for specific grades and tested content areas. This percentile rank is also based off of individual item statistics which are all taken and then analyzed by Galileo. This analysis is done over the course of several years allowing the data to be consistent. This consistency and stability also carries over from state assessments because it is aligned to state standards while comparing student percentile rank to other students across the state on the same measures. This percentile rank is not specific for only students directly at our site. As a result, this percentile rank allows each site to measure students’ relative position to all students in the state that use Galileo. Students reaching the 50th percentile or greater are considered to be on grade-level and overall proficient. However, each site also has the capability to take a more in depth analysis of specific student performance with the newly alignment to AZMerit performance level. These development levels have only recently been aligned and cannot be compared with a prior year due to lack of data available.

Therefore, for the purpose of this report, each site has determined to use the percentile rank to provide a consistent and valid source of data that can be compared over time and for multiple years. Students reaching the 50th percentile or higher will be categorized as proficient and marked under “Meets” or “MS.” Students below the 50th percentile will be categorized as not proficient and be marked under “Approaches” or “AS” based on the dichotomous variable that is created when using the percentile rank.

Complete the table below. For each measure, provide the following information:

3. HOW the data was analyzed:
 - a. Which data was used?
 - b. What criteria were used in the process?



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4. *WHAT conclusions were drawn from the analysis?*
 - a. *What trends were identified? (Incorporate declines and improvement)*
 - b. *How did the data identify gaps in curriculum and/or instruction?*
 - c. *What other factors are evident based upon the analysis?*

For more information on each of the measures, refer to the Academic Performance Framework and Guidance Document. The information provided below must be in relation to data provided on the Data Submission Spreadsheet and the accompanying source data.

DATA TABLE 2

Assessment Measure	HOW the data was analyzed	WHAT conclusions were drawn
Student Median Growth Percentile (SGP)— Math	<p>A Custom Test Report was created in order to allow the site to export a single file containing data from multiple tests and grade-levels. It is in this report that the site can select specific fields including percentile rank, development score and specific subgroup categories (i.e. ELL, SPED, FRL, and Bottom 25%). The data is then aggregated into an excel spreadsheet where the growth % rate is determined by taking the total number of students meeting growth (50 percentile or higher) and dividing it by the total number of students tested. This is done for each specific benchmark and content area.</p>	<p>The 2014-2015 maintained over 50% of the student population meeting the growth target point with an average of 58%. There was a slight decrease of 1.5% in the growth between the midpoint and end of the year. This was attributed to being a posttest where some calendared math standards were not hit during instructional time prior to assessment. However, the growth was maintained above the baseline of 54%. The inconsistency of the increase was analyzed further showing a misalignment between math curriculum calendars and benchmark testing dates. An additional benchmark 3 was added to the assessment calendar as well as assessment dates were set to better align with math curriculum calendar allowing quality instruction to be in place prior to assessing student mastery and growth.</p> <p>The 2015-2016 data shows a more consistent increase of the student population meeting the growth target point with an average of 63.67% meeting the growth target point. More specifically, the site ending at a 71% of the student population meeting the growth target point from the baseline of 57%. This was an 5.49% increase between the baseline and midpoint and a 8.34% increase between the midpoint and end of the year. It was concluded that this consistent increase was a result of better alignment of the curriculum and assessment calendar along with specific gap analysis as well as systems in place for curriculum and assessment school wide. These</p>



items will be discussed more in detailed in specific areas of the DSP.

Student Median Growth Percentile (SGP)—**Reading**

A **Custom Test Report** was created in order to allow the site to export a single file containing data from multiple tests and grade-levels. It is in this report that the site can select specific fields including percentile rank, development score and specific subgroup categories (i.e. ELL, SPED, FRL, and Bottom 25%). The data is then aggregated into an excel spreadsheet where the growth % rate is determined by taking the total number of students meeting growth (50 percentile or higher) and dividing it by the total number of students tested. This is done for each specific benchmark and content area.

The 2014-2015 maintained an average 54.33% of the student population meeting the growth target point. There was a significant increase of 16.59% in the growth between the baseline and the midpoint. This increase was continued from 59% to 61% from the midpoint to the end of the year. There was continual progression of the increase throughout the year. However, further analyzed showed a misalignment between ELA curriculum calendars and testing dates. An additional benchmark 3 was added to the assessment calendar as well as assessment dates were set to better align with ELA curriculum calendar allowing quality instruction to be in place prior to assessing student mastery and growth.

The 2015-2016 data continues to show consistent increase of the student population meeting the growth target point with an average of 58% meeting the growth target point. More specifically, the site ending at 65% of the student population meeting the growth target point from the baseline of 47%. This was a 14.66 % increase between the baseline and midpoint and a 3.48% increase between the midpoint and end of the year. It was concluded that this consistent increase was a result of better alignment of the curriculum and assessment calendar along with specific systems in place for curriculum and assessment school wide. These systems will be discussed more in detailed in specific areas of the DSP.

Student Median Growth Percentile (SGP) Bottom 25%/Improvement—**Math**

A **Custom Test Report** was created in order to allow the site to export a single file containing data from multiple tests and grade-levels. It is in this report that the site can select specific fields including percentile rank, development score and specific subgroup categories (i.e. ELL, SPED, FRL, and Bottom 25%). The data is then aggregated into an excel spreadsheet where the growth % rate is determined by taking the total number of students meeting growth (50 percentile or higher) and dividing it by the total number of students

The 2014-2015 maintained an average 25.67% of the bottom quartile of the student population meeting the growth target point in Math. There was a decrease of 2.90% between the baseline and midpoint. However, there was a significant increase of 11.04% in the growth between the midpoint and the end of the year. Further analyzed showed a gap in the quality of supplementary instruction being provided for the bottom quartile. An administrative evaluation of all subcategory departments (i.e. ELL, Special Education and Title I) was conducted identifying gaps in the quality of instruction in



tested. This is done for each specific benchmark and content area.

these departments. A restructure of the departments including personnel and systems was initiated over the summer.

The 2015-2016 data shows a more consistent increase of the bottom quartile of the student population meeting the growth target point. An average of 32.33% of the bottom quartile population was maintained. More specifically, the site ending at 45% of the bottom quartile student population meeting the growth target point from the baseline of 21%. This was a 10.06 % increase between the baseline and midpoint and a 13.54% increase between the midpoint and end of the year. It was concluded that this consistent increase was a result of better quality of supplemental instruction along with specific systems in place for monitoring instruction and professional development school wide. These systems will be discussed more in detailed in specific areas of the DSP.

Student Median Growth Percentile (SGP) Bottom 25%/Improvement—Reading

A **Custom Test Report** was created in order to allow the site to export a single file containing data from multiple tests and grade-levels. It is in this report that the site can select specific fields including percentile rank, development score and specific subgroup categories (i.e. ELL, SPED, FRL, and Bottom 25%). The data is then aggregated into an excel spreadsheet where the growth % rate is determined by taking the total number of students meeting growth (50 percentile or higher) and dividing it by the total number of students tested. This is done for each specific benchmark and content area.

The 2014-2015 maintained an average 18.67% of the bottom quartile of the student population meeting the growth target point in ELA. There was a significant increase of 14.56% between the baseline and midpoint. There was a continued increase of 2.50% in the growth between the midpoint and the end of the year. More specifically, the site ended at 25% of the bottom quartile student population meeting the growth target point in ELA from the baseline of 8%. Further analyzed showed a gap in the quality of supplementary instruction being provided for the bottom quartile. An administrative evaluation of all subcategory departments (i.e. ELL, Special Education and Title I) was conducted identifying gaps in the quality of instruction in these departments. A restructure of the departments including personnel and systems was initiated over the summer.

The 2015-2016 data shows a more consistent increase of the bottom quartile of the student population meeting the growth target point in ELA. An average of 26.67% of the bottom quartile population was maintained. More



specifically, the site ending at 39% of the bottom quartile student population meeting the growth target point from the baseline of 17%. This was a 6.92 % increase between the baseline and midpoint and a 15.33% increase between the midpoint and end of the year. It was concluded that this greater and consistent increase was a result of better quality of supplemental instruction along with specific systems in place for monitoring instruction and professional development school wide. These systems will be discussed more in detailed in specific areas of the DSP.

Percent Passing—Math

A **Custom Test Report** was created in order to allow the site to export a single file containing data from multiple tests and grade-levels. It is in this report that the site can select specific fields including percentile rank, development score and specific subgroup categories (i.e. ELL, SPED, FRL, and Bottom 25%). The data is then aggregated into an excel spreadsheet where the proficiency is determined by total number of students reaching the 50 percentile or higher. This is done for each specific subgroup, benchmark and content area.

The 2014-2015 maintained over 50% of the student population meeting proficiency(50th percentile or higher) with an average of 58%. There was a slight decrease of 2% in the proficiency between the midpoint and end of the year. This was attributed to being a posttest where some calendared math standards were not hit during instructional time prior to assessment. However, the proficiency rate was maintained above the baseline of 54%. The inconsistency of the increase was analyzed further showing a misalignment between math curriculum calendars and benchmark testing dates. An additional benchmark 3 was added to the assessment calendar as well as assessment dates were set to better align with math curriculum calendar allowing quality instruction to be in place prior to assessing student proficiency.

The 2015-2016 data shows a more consistent increase of the student population meeting proficiency(50th percentile or higher) with an average of 64%. More specifically, the site ending at a 72% of the student population meeting proficiency from the baseline of 57%. This was an 5% increase between the baseline and midpoint and a 10% increase between the midpoint and end of the year. It was concluded that this consistent increase was a result of better alignment of the curriculum and assessment calendar along with specific gap



analysis as well as systems in place for curriculum and assessment school wide. These items will be discussed more in detailed in specific areas of the DSP.

Percent Passing—Reading

A **Custom Test Report** was created in order to allow the site to export a single file containing data from multiple tests and grade-levels. It is in this report that the site can select specific fields including percentile rank, development score and specific subgroup categories (i.e. ELL, SPED, FRL, and Bottom 25%). The data is then aggregated into an excel spreadsheet where the proficiency is determined by total number of students reaching the 50 percentile or higher. This is done for each specific subgroup, benchmark and content area.

The 2014-2015 maintained an average 54.33% of the student population meeting proficiency(50th percentile or higher). There was a significant increase of 17% in the growth between the baseline and the midpoint. This increase was continued from 59% to 61% from the midpoint to the end of the year. There was continual progression of the increase throughout the year. However, further analyzed showed a misalignment between ELA curriculum calendars and testing dates. An additional benchmark 3 was added to the assessment calendar as well as assessment dates were set to better align with ELA curriculum calendar allowing quality instruction to be in place prior to assessing student proficiency.

The 2015-2016 data continues to show consistent increase of the student population meeting proficiency(50th percentile or higher) with an average of 57.33%. More specifically, the site ending at 65% of the student population meeting proficiency from the baseline of 47%. This was a 12 % increase between the baseline and midpoint and a 6% increase between the midpoint and end of the year. It was concluded that this consistent increase was a result of better alignment of the curriculum and assessment calendar along with specific systems in place for curriculum and assessment school wide. These systems will be discussed more in detailed in specific areas of the DSP.

Subgroup, ELL—Math

A **Custom Test Report** was created in order to allow the site to export a single file containing data from multiple tests and grade-levels. It is in this report that the site can select specific fields including percentile rank, development score and specific subgroup categories (i.e. ELL, SPED, FRL, and Bottom 25%). The data is then aggregated into an excel spreadsheet where the proficiency is determined by total number of students reaching

The 2014-2015 data shows an average of 17% of the site ELL population meeting proficiency (50th percentile or higher) in Math. There was a 14% increase in proficiency from the baseline to midpoint. However, the 2014-2015 year also saw a significant decrease in proficiency between the midpoint and end of the year data. An administrative evaluation of the ELL department was conducted identifying gaps in the quality of instruction and professional



the 50 percentile or higher. This is done for each specific subgroup, benchmark and content area.

development in this specific department. A restructure of the department systems was initiated in the 2015-2016 school year. These new systems will be discussed more in detailed in specific areas of the DSP.

The 2015-2016 data shows a more consistent increase of the site ELL population meeting proficiency(50th percentile or higher) with an average of 45%. More specifically, the site ending at a 58% of the ELL population meeting proficiency from the baseline of 33%. This was an 11% increase between the baseline and midpoint and a 13% increase between the midpoint and end of the year. It was concluded that this consistent increase was a result of better alignment of professional developments and department systems in place within the for all instructional staff. These items will be discussed more in detailed in specific areas of the DSP.

Subgroup, ELL—Reading

A **Custom Test Report** was created in order to allow the site to export a single file containing data from multiple tests and grade-levels. It is in this report that the site can select specific fields including percentile rank, development score and specific subgroup categories (i.e. ELL, SPED, FRL, and Bottom 25%). The data is then aggregated into an excel spreadsheet where the proficiency is determined by total number of students reaching the 50 percentile or higher. This is done for each specific subgroup, benchmark and content area.

The 2014-2015 maintained an average 7.33% of the ELL population meeting proficiency(50th percentile or higher). There was an increase of 7% in the proficiency between the baseline and the midpoint. This increase was continued from 7% to 15% from the midpoint to the end of the year. Although this was continual progression of the increase throughout the year, it was seen as minimal. An administrative evaluation of the ELL department was conducted identifying gaps in the quality of instruction and professional development in this specific department. A restructure of the department systems was initiated in the 2015-2016 school year. These new systems will be discussed more in detailed in specific areas of the DSP

The 2015-2016 data continues to show consistent and more significant increase of the ELL population meeting proficiency(50th percentile or higher) with an average of 18%. More specifically, the site ending at 26% of the ELL population meeting proficiency from the baseline of 6%. This was a 17 % increase between the baseline and midpoint and a 4% increase between the midpoint and end of the year. It was concluded that this consistent increase was a result of better alignment of



professional developments and department systems in place within the department for all instructional staff. These items will be discussed more in detailed in specific areas of the DSP.

Subgroup, FRL—Math

A **Custom Test Report** was created in order to allow the site to export a single file containing data from multiple tests and grade-levels. It is in this report that the site can select specific fields including percentile rank, development score and specific subgroup categories (i.e. ELL, SPED, FRL, and Bottom 25%). The data is then aggregated into an excel spreadsheet where the proficiency is determined by total number of students reaching the 50 percentile or higher. This is done for each specific subgroup, benchmark and content area.

The subgroup of FRL is over 65% of the school population. Therefore trends and patterns of data mirror those of the general population. Overall trends for this subcategory are in alignment with percent passing analysis.

Subgroup, FRL—Reading

A **Custom Test Report** was created in order to allow the site to export a single file containing data from multiple tests and grade-levels. It is in this report that the site can select specific fields including percentile rank, development score and specific subgroup categories (i.e. ELL, SPED, FRL, and Bottom 25%). The data is then aggregated into an excel spreadsheet where the proficiency is determined by total number of students reaching the 50 percentile or higher. This is done for each specific subgroup, benchmark and content area.

The subgroup of FRL is over 65% of the school population. Therefore trends and patterns of data mirror those of the general population. Overall trends for this subcategory are in alignment with percent passing analysis.

Subgroup, students with disabilities—Math

A **Custom Test Report** was created in order to allow the site to export a single file containing data from multiple tests and grade-levels. It is in this report that the site can select specific fields including percentile rank, development score and specific subgroup categories (i.e. ELL, SPED, FRL, and Bottom 25%). The data is then aggregated

The 2014-2015 data shows an average of 38.33% of the site SPED population meeting proficiency (50th percentile or higher) in Math. There was a 9% increase in proficiency from the baseline to midpoint and an increase of 11% from the midpoint to the end of the year. An administrative evaluation of the SPED department was conducted identifying gaps in the quality of instruction and professional development in this specific department. A



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into an excel spreadsheet where the proficiency is determined by total number of students reaching the 50 percentile or higher. This is done for each specific subgroup, benchmark and content area. **restructure of the department personnel and systems was initiated in the 2015-2016 school year. These new systems will be discussed more in detailed in specific areas of the DSP.**

The 2015-2016 data shows a sustained increase of the site SPED population meeting proficiency(50th percentile or higher). However, there was a slight decrease with an average of 33%. There was a 9% increase in proficiency from the baseline to midpoint and an increase of 3% from the midpoint to the end of the year. It was concluded that this sustained increase was a result of better alignment of professional developments and department systems in place within the department for all instructional staff. These items will be discussed more in detailed in specific areas of the DSP.

The 2014-2015 data shows an average of 29% of the site SPED population meeting proficiency (50th percentile or higher) in ELA. There was a significant 19% increase in proficiency from the baseline to midpoint. However, the site did see a slight decrease of 1% from the midpoint to the end of the year. An administrative evaluation of the SPED department was conducted identifying gaps in the quality of instruction and professional development in this specific department. A restructure of the department personnel and systems was initiated in the 2015-2016 school year. These new systems will be discussed more in detailed in specific areas of the DSP.

Subgroup, students with disabilities—**Reading**

A **Custom Test Report** was created in order to allow the site to export a single file containing data from multiple tests and grade-levels. It is in this report that the site can select specific fields including percentile rank, development score and specific subgroup categories (i.e. ELL, SPED, FRL, and Bottom 25%). The data is then aggregated into an excel spreadsheet where the proficiency is determined by total number of students reaching the 50 percentile or higher. This is done for each specific subgroup, benchmark and content area.

The 2015-2016 data shows a progressive increase of the site SPED population meeting proficiency(50th percentile or higher) with an average of 26%. There was a 11% increase in proficiency from the baseline to midpoint and an increase of 7% from the midpoint to the end of the year. It was concluded that this sustained increase was a result of better alignment of professional developments and department systems in place within the department for all instructional staff. These items will be discussed more in detailed in specific areas of the DSP.



High School Graduation Rate (Schools serving 12 th grade only)	Not Applicable	Not Applicable
Academic Persistence (Alternative High Schools Only)	Not Applicable	Not Applicable

AREA II: CURRICULUM

Answer the questions for each of the following six sections. Provide documentation that will clearly demonstrate implementation of the processes.

A. Evaluating Curriculum

Question #1: What ongoing process does the Charter Holder use to evaluate curriculum? What criteria guide that process?

Answer

The Charter Holder’s curriculum evaluation process occurs both at the district and site level in order to ensure that all ACCR standards are addressed by the currently adopted core and supplemental curriculum, the curriculum is sufficient and effective for teaching each of the standards to mastery, and no curricular gaps are present or go unaddressed during instruction. Standards Alignment Checklists are first completed by the district curriculum committee to verify that the adopted Beyond Textbook Curriculum Calendars, include all of the ACCR standards for each grade level, Kindergarten through 8th grade. Curriculum Alignment Checklists are then completed by the district curriculum committee for all grade levels to ensure quality resources, sufficient for addressing all of the ACCR standards, are provided to all instructional staff. Once complete, the information from the Standards Alignment and Curriculum Alignment Checklists are transferred to a comprehensive Gap Analysis and the district curriculum committee evaluates these forms to identify any areas in which the curriculum is lacking alignment or completeness for addressing the ACCR standards. Any gaps found in the current curriculum are recorded and submitted to site principals using Curriculum Request Forms, which list suggestions for curriculum that will serve to address curricular gaps. Curriculum Request Forms may also be completed and submitted to site principals by teachers or department heads at any point during the school year. Site principals review these forms with the administrative team and make determinations as to whether the additional curriculum is sufficient and financially feasible. Finally the curriculum is either approved for purchase or denied. The administrative team may also request further research is conducted through committees or requesting staff member. If further research is requested, the a new Curriculum Request Form with additional research is submitted to the site principal for consideration.

Documentation



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Provide a bulleted list of documents that serve as evidence of implementation of this process:

- Beyond Textbooks Curriculum Calendars
- Standards Alignment Checklist
- Curriculum Alignment Checklists
- Gap Analysis
- Curriculum Request Forms

Question # 2: What ongoing process does the Charter Holder use to evaluate how effectively the curriculum enables students to meet all standards? What criteria guide that process?

Answer

Write answer here. Suggested word count is 400 words.

There is a close alignment between Beyond Curriculum Calendars and school assessment plans in order to evaluate if students meet all standards using core and supplemental curriculum. All essential standards are scheduled prior to State Assessments and year long standards are scheduled throughout the year on the curriculum calendars. Curriculum calendars guarantee the length and depth of standards are consistent across grade-levels with the online access to Unwrapped Documents. Unwrapped documents then ensure standards are taught to the appropriate level of “rigor”, assist in the development of common formative assessments, benchmark assessments, performance tasks and model products as well as assist in the development of student friendly language for essential standards.

The Gap Analysis then allows teachers to teach all standards during the school year for each specific grade-level standards. Once the standard has been introduced and developed, and mastery is taught, teachers administer the District Common Formative Assessments. District Common Formative Assessments assess each performance objective found on the Galileo Benchmark Assessment Blueprint. Formative assessments results are recorded by classroom teachers on Data Collection Sheets to determine mastery level of each standard assessed. The assessment systems are in place to monitor each student’s individual learning of all standards. Galileo Benchmark Assessments are then scheduled every 7-8 weeks in alignments with standards taught based of the curriculum calendar. Once data is aggregated grade-level PLCs meet to evaluate student performance, trends and gaps through the Data Reflection Form as well as the Gap Analysis.

Documentation

Provide a bulleted list of documents that serve as evidence of implementation of this process:



- Beyond Textbooks Curriculum Calendars
- Sample of Unwrapped Documents
- Gap Analysis
- Sample of District Common Formative Assessment
- Galileo Benchmark Blueprint
- Benchmark Assessment Calendar
- Data Collection Sheets
- Data Reflection Form
- Curriculum Calendar Revision Spreadsheet

Question # 3: What ongoing process does the Charter Holder use to identify curricular gaps? What criteria guide that process?

Answer

The district curriculum committee identifies gaps in the current curriculum by completing Curriculum Alignment Checklists for all grade levels and subgroups. A detailed Gap Analysis, designed to assess whether the current curriculum is sufficient for meeting the specific needs of all students and subgroup populations, is completed to further assess the results of the Curriculum Alignment Checklists. The curriculum committee then shares the Gap Analysis with instructional staff to analyze and determine whether additional curriculum and resources are needed to teach the ACCR standards to mastery. The curriculum committee, department heads and classroom teachers research and evaluate curriculum that thoroughly addresses the identified gaps. The results are then submitted to the site principal via Curriculum Request forms for consideration. Any gaps found in the current curriculum and standards are recorded and submitted to the school Data Committee. The Data Committee then compiles misalignments and gaps to submit to site principal as well as Beyond Textbook for the following year.

Documentation

Provide a bulleted list of documents that serve as evidence of implementation of this process:

- Curriculum Alignment Checklists
- Gap Analysis
- Curriculum Request forms



B. Adopting Curriculum

Question #1: After curriculum is evaluated, what process does the Charter Holder use to determine if new and/or **supplemental curriculum** needs to be adopted? What criteria guide that process?

Answer

The Charter Holder’s process for adopting new curriculum is first determined through the findings of the Gap Analysis. The curriculum committee then shares the Gap Analysis with instructional staff to analyze and determine whether additional curriculum and resources are needed to teach the ACCR standards to mastery. The district curriculum committee, department heads, and classroom teachers are all involved in pursuing new and supplemental curriculum if gaps are present through Gap Analysis or another form of supported evidence/data (i.e. overall low performance on DIBELS, AZELLA, SPED Progress Reports, etc). A proposal is created using data/evidence of need, research conducted for specific curriculum and the Curriculum Request Form. The site administrative team reviews requests/proposals for the adoption of new and/or supplemental curriculum to ensure that it is research-based and fulfills the identified gaps. Site principals will determine whether the curriculum proposed meets the needs of students, sufficiently addresses the standards, fulfills curricular gaps, and is financially feasible. Site principals may require additional data and/or research to be conducted to further inform final decisions.

Documentation

Provide a bulleted list of documents that serve as evidence of implementation of this process:

- Site Specific Gap Analysis
- District Curriculum Meeting Sign-ins
- District Curriculum Meeting Agendas
- District Curriculum Meeting Minutes
- New/Supplemental Curriculum Request Form
- Sample New/Supplemental Curriculum Proposal

Question #2: Once the Charter Holder has chosen to adopt new and/or **supplemental curriculum**, how has the Charter Holder evaluated curriculum options? What criteria guide that process?

Answer

Write answer here. Suggested word count is 400 words.

The Charter Holder’s curriculum options, for school-wide instructional use, are evaluated according to ACCR standards alignment, the presence of adequate components that will address the academic needs of all students and subgroups, and financial feasibility. The district curriculum committee is



responsible for being step in the adoption of new or supplemental curriculum in our process. First Research is conducted regarding the adoption of new and/ supplemental curriculum that takes into consideration the specific needs of general education students, ELL students, students with disabilities, FRL students, and students within the bottom 25%. In the event that curriculum is requested to address the specific needs of particular grade levels or subgroups, (rather than addressing the needs of all students and subgroups school-wide), the curriculum may be approved and adopted if the research conducted by teachers, department heads, or the district curriculum committee supports the need for these specific materials. Site principals evaluate all curriculum requests to ensure that they are research-based, support the teaching and learning of the ACCR standards, and include materials sufficient for meeting the academic needs of students within these specified grade levels and subgroups. When new curriculum is adopted, the district curriculum committee and site principals ensure that all instructional staff that will be using the new curriculum is adequately trained in implementing its resources and materials with fidelity. Ongoing professional development is provided to new instructional staff members that will be implementing the curriculum to ensure the staff is adequately trained. All newly development curriculum is evaluation using a standardized rubric which outlines the Criteria for Evaluating Effectiveness of Curriculum.

Documentation

Provide a bulleted list of documents that serve as evidence of implementation of this process:

- District Curriculum Committee Meeting Sign-ins
- District Curriculum Committee Meeting Agendas
- District Curriculum Committee Meeting Minutes
- Professional Development for new staff and/or new curriculum.
- Criteria for Evaluating Effectiveness of Curriculum

C. Revising Curriculum

Question #1: After curriculum is evaluated, what process does the Charter Holder use to determine if curriculum must be revised? What criteria guide that process?

Answer

Write answer here. Suggested word count is 400 words.

The Charter Holder’s process for revising curriculum is determined by the findings of the *Gap Analysis*. The district curriculum committee, department heads, and instructional staff are involved in the process



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for determining revisions and pursuing new curriculum research. Site principals evaluate potential revisions in curriculum proposed by the curriculum committee to determine whether these revisions will meet the needs of all students, or the additional needs of students in specific grade levels or subgroups. The revisions are evaluated for adequate support of the ACCR standards, research-based identified needs, and financial feasibility. Site principals may request that further evaluation be conducted before approving any revisions to the current curriculum.

Documentation

Provide a bulleted list of documents that serve as evidence of implementation of this process:

- Gap Analysis
- Curriculum Meeting Sign-ins
- Curriculum Meeting Agendas
- Curriculum Meeting Minutes
- New/Supplemental Curriculum Request Form
- Sample New/Supplemental Curriculum Proposal

Question #2: Once determined that curriculum must be revised, what process does the Charter Holder use to revise the curriculum? What criteria guide that process?

Answer

Write answer here. Suggested word count is 400 words.

The curriculum and data committees, instructional staff, department heads, and site principals will collaborate in the process for pursuing possible revisions to the current curriculum. Suggested revisions to the curriculum will be evaluated according to standards alignment, the presence of components that will address the academic needs of all students and subgroups, and financial feasibility. The curriculum and data committees complies specific revisions needed in curriculum calendars and assessments. Then the committees will submit revisions to site principals via spreadsheets (Curriculum Calendar Revision Spreadsheet and Galileo Blueprint Revision Spreadsheet) as well as Beyond Textbook and ATI-Galileo for the following year. Administration then follows up with the curriculum and data committees, instructional staff and department heads the following school year to verify that revisions were made and aligned to spreadsheets submitted.



If revision is needed in other areas, additional research is conducted for effective alternatives and/or revisions. The research conducted regarding the revision of curriculum will then be submitted to site principal and administration through a formal proposal. Administrators also take into consideration the needs of general education students, ELL students, students with disabilities, FRL students, and students within the bottom 25%. This will ensure that the revised curriculum offers appropriate components to meet the needs of all students. Administration then follows up with the curriculum and data committees, instructional staff and department heads the following school year to verify that revisions were made and aligned to approved proposal.

Documentation

Provide a bulleted list of documents that serve as evidence of implementation of this process:

- Curriculum Meeting Sign-ins
- Curriculum Meeting Agendas
- Curriculum Meeting Minutes
- Curriculum Calendar Revision Spreadsheet
- Galileo Blueprint Revision Spreadsheet
- New/Supplemental Curriculum Request Form
- Sample New/Supplemental Curriculum Proposal

D. Implementing Curriculum

Question #1: What ongoing process does the Charter Holder use to ensure curriculum is implemented with **fidelity**? How have these expectations been communicated to instructional staff?

Answer

Write answer here. Suggested word count is 400 words.

The Charter Holder’s process for ensuring that core and supplemental curriculum is being implemented with fidelity involves the clear and consistent communication of professional expectations for teachers and instructional staff, ongoing professional development in curriculum planning, usage, and implementation, and follow-up evaluations conducted by principals, department heads, and assistant principals.

At the beginning of the year, The Expectations for Curriculum Implementation (located in the Employee Handbook) and Beyond Textbook Non-Negotiables, are reviewed by site principals and department heads with all instructional staff during individual grade-level breakout sessions. Beyond Textbook 101 and 102 along with other professional developments are provided to all instructional staff members at



Demonstration of Sufficient Progress Report

the who are unfamiliar with or need a refresher course in the usage and implementation of the current curriculum. New instructional staff members are provided with one full day and New Teacher Induction to go over schoolwide expectations and programs. All instructional staff are also provided with an Instructional Staff Binder that holds all expectations and guidelines, including curriculum guidelines.

Throughout the year, the Teacher Mentor Program also provided additional professional development and training for incoming staff or those needing additional support to effectively implement core and supplemental curriculum. Classroom Walkthroughs and Informal Observations provide an outlet for observing curriculum implementation at an administrative level. These are conducted by principals, vice principals and department heads to ensure regular feedback is provided regarding the consistent implementation of core and supplemental curriculum by all instructional staff. Assistant principals evaluate weekly lesson plans to ensure core and supplemental curriculum is being utilized and appropriately incorporated into standards-based lessons. Lesson Plan Feedback is issued by assistant principals and returned to teachers with suggestions for improvements or modifications in curriculum planning and implementation.

Documentation

Provide a bulleted list of documents that serve as evidence of implementation of this process:

- Expectations for Curriculum Implementation
- Beyond Textbook Non-Negotiables
- Welcome Week Agenda
- New Teacher Induction Agenda
- Professional Development Sign-ins
- Copy of BT 101/102 PD Presentations/Folders
- Instructional Staff Binders
- Teacher Mentor Program PD Schedule
- Classroom Walkthrough Form
- Informal Observation Form
- Lesson Plan Feedback

Question #2: What is the Charter Holder's ongoing process to ensure consistent use of **curricular tools**? How have these expectations been communicated to instructional staff?

Answer

Write answer here. Suggested word count is 400 words.



The Charter Holder’s process for ensuring the consistent use of curricular tools involves the clear and consistent communication of professional expectations for teachers and instructional staff, ongoing professional development in curriculum planning, usage, and implementation, and follow-up classroom walkthroughs and informal observations. Classroom walkthroughs and informal observations of all instructional staff are conducted by principals, department heads, and assistant principals to ensure that the consistent use of curricular tools (e.g. curriculum calendars and unwrapped documents) is occurring.

At the beginning of the year, The Expectations for Curriculum Implementation (located in the Employee Handbook) and Beyond Textbook Non-Negotiables, are reviewed by site principals and department heads with all instructional staff during individual grade-level breakout sessions. Beyond Textbook 101 and 102 training is provided to all instructional staff members in order to introduce and review curricular tools available. New instructional staff members are also provided with one full day and New Teacher Induction to go over schoolwide instructional process which includes curricular tools in four major areas (i.e. curriculum, instruction, assessment and intervention). All instructional staff are also provided with an Instructional Staff Binder that holds all expectations and guidelines, including curriculum guidelines.

Throughout the year, grade-level teams meet to collaborate during lesson planning. Team Leads ensure lessons are aligned to curriculum calendars and academic rigor are materials are aligned with Unwrapped Documents. A grade-level lesson plan is then submitted to the administration team and department heads. Assistant principals evaluate the weekly lesson plans to ensure core and supplemental curricular tools are being utilized in General Education Lesson Plans. Department heads also evaluate weekly lesson plans of supplemental services to ensure core and supplemental curricular tools are being utilized during supplemental instruction. Lesson Plan Feedback Forms are completed by assistant principals and department head. Feedback is then returned to teachers and instructional staff with suggestions for improvements or modifications for use of curricular tools. The Teacher Mentor Program also provided additional professional development and training for incoming staff or those needing additional support to effective use of curricular tools (i.e. Beyond Textbooks, BT Wiki, Galileo, etc).

Documentation

Provide a bulleted list of documents that serve as evidence of implementation of this process:

- Expectations for Curriculum Implementation
- Beyond Textbook Non-Negotiables
- Welcome Week Agenda
- New Teacher Induction Agenda
- Professional Development Sign-ins
- Copy of BT 101/102 PD Presentations/Folders
- Instructional Staff Binders
- Teacher Mentor Program PD Schedule
- Classroom Walkthrough Form



- Informal Observation Form (Classroom Teachers)
- Supplemental Instruction Informal Classroom Observation Form
- Lesson Plan Feedback (General Ed and Supplemental Instruction)

Question #3: What process does the Charter Holder use to ensure that all grade-level standards are taught to mastery within the academic year?

Answer

Write answer here. Suggested word count is 400 words.

The Charter Holder ensures that all grade-level standards are taught to mastery by supplying instructional staff with a close alignment between Beyond Curriculum Calendars and school assessment plans in order to ensure all grade-level standards are taught to mastery within the academic year. The Beyond Textbooks Curriculum Calendars were evaluated by the district curriculum committee for standards alignment prior to the implementation of the Beyond Textbooks program, which was adopted to improve the quality of instruction and aid teachers in the practice of data driven decision-making. All essential standards are scheduled prior to State Assessments and year long standards are scheduled throughout the year on the curriculum calendars. At the beginning of the year, all instructional staff are provide training on Beyond Textbook 101 and 102 which provides an overview of curriculum calendars, unwrapped documents and common formative assessments. New instructional staff members are also provided with one full day and New Teacher Induction to go over schoolwide instructional process which includes curricular tools in four major areas (i.e. curriculum, instruction, assessment and intervention). Lead and mentor teachers at each site also assist in training incoming teachers in the use of curriculum calendars and supplemental materials that pertain to their grade level/subject. These measures are taken in order to have curriculum calendars guarantee the length and depth of standards are consistent across grade-levels with the online access to Unwrapped Documents.

Unwrapped documents then ensure standards are taught to the appropriate level of “rigor”, assist in the development of common formative assessments, benchmark assessments, performance tasks and model products as well as assist in the development of student friendly language for essential standards. Throughout the year, grade-level teams meet to collaborate during lesson planning. Team Leads ensure lessons are aligned to curriculum calendars and academic rigor are materials are aligned with Unwrapped Documents. A grade-level lesson plan is then submitted to the administration team



and department heads. Assistant principals and department heads conduct lesson plan checks and lesson plan feedback to ensure teachers are following the Beyond Textbooks Curriculum Calendars and allotting the designated amount of time to each standard for students to achieve mastery.

Once the standard has been introduced and developed, and mastery is expected teachers administer the District Common Formative Assessments. District Common Formative Assessments assess each performance objective found on the Galileo Benchmark Assessment Blueprint. Formative assessments results are recorded by classroom teachers on Data Collection Sheets to determine placement for students needing standard reteaching and enrichment.

Re-teach/Enrich, an essential component of the Beyond Textbooks program, offers a school-wide approach to achieving standards mastery in math and reading. All instructional staff members are required to follow the district-wide Re-teach/Enrich Expectations, communicated by the site principals at the beginning of the school year. The process of Re-teach/Enrich takes place at the conclusion of each standard taught. Classroom teachers administer *District Common Formative Assessments*, (DFAs), to assess student comprehension of the recently completed standard. Grade level teams and instructional support staff then meet to discuss assessment results and place students in ability groups based on performance. As the teacher moves forward with the next standard on the calendar, this previous standard is reviewed or built upon during Re-teach/Enrich sessions. After one week of Reteach/Enrich, a parallel District Formative Assessment (DFA2) can be given to evaluate changes in student growth and proficiency. The results are recorded by classroom teachers on Data Collection Sheets to chart improvement/growth. Students who have not mastered the standard at this time can continue to receive remedial instruction through Title 1 services and/or after school tutoring. Data Collection Sheets are organized by in a spreadsheet workbook based on standards found on Galileo Benchmark. Teachers can then document student progress of individual standards prior to benchmark assessment.

The assessment systems are in place to monitor each student's individual learning of all standards. This is accomplished through District Common Formative Assessments and Galileo Benchmark Assessments. Galileo Benchmark Assessments are then scheduled every 7-8 weeks in alignments with standards taught based of the curriculum calendar. Once data is aggregated grade-level PLCs meet to evaluate student performance, trends and gaps through the Data Reflection Form. Grade-level teams and individual teachers are required to submit their Data Reflections Forms to administration after each benchmark. Informal observations are also conducted by administration to ensure teachers are implementing instructional strategies and grade-level curriculum effective in teaching the ACCR standards to mastery.

Documentation

Provide a bulleted list of documents that serve as evidence of implementation of this process:

- Sample of BT Curriculum Calendars



- Beyond Textbook Non-Negotiables
- Welcome Week Agenda
- New Teacher Induction Agenda
- Professional Development Sign-ins
- Copy of BT 101/102 PD Presentations/Folders
- Sample of Unwrapped Documents
- Lesson Plan Feedback Form
- Sample of District Common Formative Assessment
- Galileo Benchmark Assessment Blueprint
- Data collection Sheets (Formative Assessment Data)
- Reteach/Enrich Expectations
- Galileo Assessment Calendar
- Data Reflection Form (Galileo Benchmark Data)
- Informal Observation Form

E. Alignment of Curriculum

Question #1: What process does the Charter Holder use to verify that the curriculum is aligned to Arizona’s College and Career Ready Standards?

Answer

Write answer here. Suggested word count is 400 words.

All curriculum adopted by the Charter Holder is evaluated by the district curriculum committee for quality and efficacy. The district committee verifies that our curriculum is aligned to the AZCCRS by first filling out a gap analysis that indicates all grade level standards are present in the current curriculum and if not the supplemental material that is used to ensure that each standard is covered in a year. This analysis gives our teachers the quarter the standards are covered and ensures that they are assessed to determine mastery. A Curriculum Alignment Checklist is completed by committee members for each grade level to verify that the district’s current curriculum is aligned to the ACCR standards. The committee also uses this document to determine whether the curriculum is sufficient for teaching all of the ACCR standards to mastery. Curricular and assessment tools are cross-checked with the ACCR standards using the district’s Standards Alignment Checklist, which is completed by the district data committee at the beginning of the school year. This document ensures that all standards are addressed within the curriculum calendars and district assessments over the course of the school year.

Documentation



Demonstration of Sufficient Progress Report

Provide a bulleted list of documents that serve as evidence of implementation of this process:

- Curriculum Alignment Checklists
- ACCR standards
- Standards Alignment Checklist

Question #2: When adopting or revising curriculum, what process does the Charter Holder use to monitor and evaluate changes to ensure that curriculum maintains alignment to Arizona’s College and Career Ready Standards?

Answer

Write answer here. Suggested word count is 400 words.

The Charter Holder’s ongoing process for monitoring and evaluating the alignment of new and revised curriculum to the ACCR standards involves the review of Curriculum Alignment Checklists for all grade levels, which are completed by the curriculum committee at the beginning of the school year. To ensure curriculum alignment to standards is maintained, any changes made to curriculum or instruction will be monitored by site principals and department heads to ensure that the Expectations for Curriculum Implementation are being fulfilled. Principals and department heads will evaluate curriculum alignment to the ACCR standards during lesson plan checks, lesson plan feedback, and classroom informal observations.

Documentation

Provide a bulleted list of documents that serve as evidence of implementation of this process:

- Curriculum Alignment Checklists
- Expectations for Curriculum Implementation
- Lesson Plan Feedback (General Ed and Supplemental Instruction)
- Informal Observation Form (Classroom Teachers)
- Supplemental Instruction Informal Classroom Observation Form



F. Adapted to Meet the Needs of Subgroups

Complete the table below with the Charter Holder’s applicable information. Descriptions within the table should be brief and concise. If a subgroup comprises more than 65% of the student population at all schools operated by the Charter Holder, please check the box in the exempt column, and leave that subgroup blank.

Subgroup Curriculum Table

Subgroup	Exempt	How does the Charter Holder assess each subgroup to determine effectiveness of supplemental and/or differentiated instruction and curriculum?	List documents that serve as evidence of implementation of this process
Traditional Schools: Students with proficiency in the bottom 25% Alternative schools: Non-proficient students	<input type="checkbox"/>	The Charter Holder ensures that the current curriculum sufficiently addresses the needs of students in the bottom 25% regular monitoring of instructional and differentiation practices (i.e. during core and supplemental instruction), individual student progression and analyzing benchmark assessment results of students in the bottom quartile. <u>Lesson plans</u> from General Education Teachers are shared with the Title I Interventionist in order to create <u>supplemental lesson plans</u> for intervention time with Title I Interventionist. Supplemental lesson plans are then submitted to the Title I Director who monitors, evaluates and provides <u>Lesson Plan Feedback</u> to interventionist. During the intervention time (i.e. non core instruction time), the Title I Interventionist takes the students in the bottom quartile to re-teach the concepts from their classroom using previously shared lesson plans from the	<ul style="list-style-type: none"> ● Shared Lesson Plans from General Education Teachers ● Supplemental Instruction Lesson Plans ● Lesson Plan Feedback (Supplemental Instruction) ● Reading Intervention Matrix/Guide ● Title I Student Progress Reports ● Supplemental Instruction Classroom Observation Form ● Galileo Intervention Group Results ● Child Find/SST Meeting Summary ● Sample Intervention Plan



Demonstration of Sufficient Progress Report

	<p>General Education Teacher while implementing the specialized instruction. The Title I Interventionist monitors the progress of students in bottom quartile after each <u>quarterly benchmark</u>. <u>Quarterly Progress Reports</u> are provided to general education teachers and parents after interventionist analyze <u>Galileo Benchmark Data</u> for students in the bottom quartile. Title I Director reviews quarterly progress reports along with <u>Galileo Intervention Group Reports</u> to monitor individual student progress along with identify any trends and patterns within the department, specific grade-levels or individual classrooms. If any of the current curriculum is found insufficient for meeting the academic needs of students in the bottom quartile, the Title 1 director meets with administration to explore curriculum alternatives and the adoption or modification of curriculum occurs as needed.</p> <p><u>Child Find/SST Meetings</u> are held on a need basis for General Education Teachers struggling to develop appropriate use of supplemental curriculum through an <u>Intervention Plan</u> based on needs of students within the bottom quartile. <u>The Reading Intervention Matrix/Guide</u> is the resource available school-wide for teachers to see examples of differentiated instruction for specific elements of reading instruction.</p> <p>All instructional staff working with students in the bottom quartile are evaluated by the site principal for providing appropriate supplemental curriculum through <u>informal observations and formal evaluations</u>. Formative and Benchmark data is analyzed in grade-level team meetings to monitor the</p>	<ul style="list-style-type: none"> ● Informal Observations ● Formal Evaluations
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Demonstration of Sufficient Progress Report

		<p>performance and growth of students in all subcategories.</p> <p>*As long as students are progressing at a rate equivalent with their grade level counterparts no adaptation is made. Students who are not progressing as expected are individually assessed to determine the cause and if additional curriculum or supplemental curriculum is needed the director of that department is responsible for requesting additional resources through the curriculum committee using the same process and procedure as all other acquisitions are done.</p>	
ELL students	<input type="checkbox"/>	<p>The Charter Holder ensures that the current curriculum sufficiently addresses the needs of ELL students by regularly evaluating the student improvement through schoolwide and subgroup specific assessments.</p> <p>ELL is 4% of the total population, therefore all ELL students are on ILLPs and curriculum is differentiated based on proficiency levels in the mainstream classroom. The district ELL coordinator evaluates the current curriculum after every benchmark to assess whether specialized materials implemented by instructional staff were effective in helping ELL students meet the ACCR standards along with progress in specific standards (i.e. English Language Proficiency (ELP) Standards) for the subgroup. The <u>ILLP (Individual Language Learner Plan)</u> is the written plan in the mainstream classroom that specifies what happens, instructionally, for the particular English language learner (ELL).The English Language Proficiency (ELP) Standards and</p>	<ul style="list-style-type: none"> ● ELP Standards ● BT Progression Charts ● Gap Analysis ● ILLPs Samples



Demonstration of Sufficient Progress Report

		<p>Performance Indicators are used in the instruction of ELLs on an ILLP. Depending among the grade level teachers use a variety of resources to address the instructional gaps in the current curriculum specifically for ELL students. <u>Gap analysis</u> identifies the ELP standards associated with each BT standard throughout the year. .The English Language Proficiency (ELP) Standards and Performance Indicators are used in the instruction of ELLs on an ILLP. BT Progression Charts provide teachers ELP standards that are mostly used by stage and proficiency level. ELP Standards also provide prerequisite language skills for ELLs to access academic content. Supplemental materials used by grade level to allow students to access grade level standards.</p>	
Students eligible for FRL	<input checked="" type="checkbox"/>	<p>These subgroup is more than 65% of total student population at all schools operated by the Charter Holder.</p>	Not Applicable
Students with disabilities	<input type="checkbox"/>	<p>The Charter Holder ensures that the current curriculum addresses the needs of students with disabilities by regular monitoring of instructional and differentiation practices, student progression of individual goals and analyzing benchmark assessment results of students with disabilities. <u>Lesson plans</u> from General Education Teachers are shared with the Special Education Teacher in order to collaborate and ensure appropriate supplemental and/or differentiated instruction and curriculum based on the</p>	<ul style="list-style-type: none"> ● SpEd Progress Reports ● Galileo Intervention Group Results ● IEP reviews ● IEP Meeting Notes ● Collaboration Conference Meeting Notes ● Shared Lesson Plans ● Informal Observations ● Formal Evaluations



	<p>needs of students with disabilities. <u>Collaboration conferences/meetings</u> are held on a need basis for General Education Teachers struggling to develop appropriate supplemental and/or differentiated instruction and curriculum based on needs of students with disabilities. <u>Beyond Textbooks</u> is the online resource and collaborative school-wide community used at Heritage Elementary/Middle School. During the re-teach rotations, the Special Education Teacher takes the special students to re-teach the concepts from their classroom using previously shared lesson plans from the General Education Teacher while implementing the specialized instruction.</p> <p>The special education director monitors the progress of students in Special Education after each <u>quarterly benchmark</u> and/or <u>department progress reports</u>. It is during this time the director assesses whether the specific curriculum implemented by instructional staff was effective in helping students with disabilities meet or show growth on the ACCR standards based on individual abilities. Any curriculum or instruction found insufficient for meeting the academic needs of students with disabilities is addressed by the IEP team (i.e. General Education Teachers, Special Education teacher, Special Education Director, Parent/Guardian and Speech Language Pathologist) during an <u>IEP review meeting</u>.</p> <p>All instructional staff working with students with disabilities are evaluated by the site administration and department head for providing appropriate use of supplemental curriculum (i.e. <i>Moving with Math-Foundations, Learning A-Z: Reading and</i></p>	
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		<p><i>Writing, and/or Phonics for Reading)</i> through <u>informal observations and formal evaluations</u>. Formative and Benchmark data is analyzed in grade-level team meetings to monitor the performance and growth of students in all subcategories.</p> <p>*As long as students are progressing at a rate equivalent with their grade level counterparts no adaptation is made. Students who are not progressing as expected are individually assessed to determine the cause and if additional curriculum or supplemental curriculum is needed, the director of that department is responsible for requesting additional resources through the curriculum committee using the same process and procedure as all other acquisitions are done.</p>	
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AREA III: ASSESSMENT

Answer the questions for each of the following three sections. Provide documentation that will clearly demonstrate implementation of the processes.

A. Developing the Assessment System

Complete the table below with the Charter Holder’s applicable information.

Assessment System Table

Assessment Tool	What grades use this assessment tool?	How is it used? (formative, summative, benchmark, etc.)	What <u>performance measures</u> are assessed?	What assessment data is generated?	When/how often is it administered?
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Demonstration of Sufficient Progress Report

ATI-Galileo pre-test, benchmark, and post-test assessments	K-8th (Pre and Post Tests) 3-8 (Benchmark Tests)	Formative, benchmark and summative	Student growth and proficiency; ACCR standards mastery; Pre-test baseline proficiency, student growth and proficiency scores for each benchmark, pre to post-test growth and proficiency, year-end proficiency.	Benchmark results measuring growth and proficiency by standard, pre to post-test data measuring the current year's overall growth and year-end proficiency, and year-over-year growth data.	Pre-test and benchmark 1 in the Fall, benchmark 2 in the winter, benchmark 3 and post-test in the spring (5x/year)
Beyond Textbooks District Formative Assessments	1st-8th	Formative	Monthly and quarterly growth and proficiency based on grade level ACCR standards	Reading and math assessment results by standard	Weekly/biweekly (at the conclusion of every standard taught in accordance with the <i>Beyond Textbooks Curriculum Calendars</i>)
DIBELS	K-2nd	Formative and Benchmark	Early literacy and grade level reading fluency	Universal Screening results identify and progress monitor students requiring reading intervention in accordance with the <i>Move On When Reading</i> initiative.	3x/year Benchmark Testing; Monthly Progress Monitoring for struggling students



Demonstration of Sufficient Progress Report

AzMerit Assessment	3 rd -8th	Summative	Growth and proficiency on ACCR standards	Year-end student achievement data	Yearly
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Question #1: What ongoing process does the Charter Holder use to evaluate assessment tools? What criteria guide that process?

Answer

Write answer here. Suggested word count is 400 words.

The Charter Holder’s ongoing evaluation of assessment tools is a collaborative, district-wide process which includes, administrators, grade-level teachers, department heads and the district curriculum and data committee. Site principals work closely with representatives from ATI-Galileo to establish an assessment calendar, the Benchmark Assessment Schedule, which is distributed to all instructional staff at the beginning of the school year. This assessment schedule is aligned to the Beyond Textbooks Curriculum Calendars and is designed to provide teachers with a remediation window for reviewing formative assessment results prior to each benchmark. District Formative Assessments are part of the Beyond Textbooks program and are administered throughout the duration of each quarter, at the conclusion of each standard, to prepare students for benchmark testing. Data Collection Sheets are completed by all classroom teachers and shared with site administrators and instructional staff from special education, Title 1, and ELL, who work with each teacher’s students after each District Formative Assessment is administered. Instructional teams then meet to analyze formative assessment data. This system of assessment and tracking provides teachers and students with consistent, detailed and timely data, which enhances the progress monitoring process and informs student remediation. The process also allows administrators and department heads to evaluate the effectiveness of the adopted assessment tools consistently throughout the school year.

The district data committee evaluates the test blueprints of ATI-Galileo pre-tests, post-tests, and benchmark assessments (through the Gap Analysis) to ensure that they are aligned with and include all of the ACCR standards at each grade level throughout the year. This is achieved through the use of the Standards Alignment Checklists which are completed by grade-level teachers and then submitted to the district data committee. The Data Committee then compiles misalignments and/or gaps to submit to site principals via spreadsheet (Curriculum Calendar Revision Spreadsheet and Galileo Blueprint Revision Spreadsheet) as well as Beyond Textbook for the following year. Formative assessments tools are also reviewed for standards alignment and all assessments are scheduled in accordance with the curriculum calendars. The administrations, grade-level teachers, department heads and the district curriculum and data committee also evaluates the assessment system to ensure that formative, benchmark, and summative assessment tools are correlative throughout the year. The Data Committee then compiles misalignments and/or gaps to submit to site principals via spreadsheets (Curriculum Calendar Revision



Spreadsheet and Galileo Blueprint Revision Spreadsheet) as well as Beyond Textbook and ATI-Galileo for the following year.

Documentation

Provide a bulleted list of documents that serve as evidence of implementation of this process:

- Benchmark Assessment Schedule
- Beyond TextBooks Curriculum Calendars
- District Formative Assessments
- Data Collection Sheets
- Standards Alignment Checklist
- Gap Analysis
- Curriculum Calendar Revision Spreadsheet
- Galileo Blueprint Revision Spreadsheet
- Email correspondence with Galileo and Beyond Textbook Staff

Question #2: What ongoing process does the Charter Holder use to evaluate how the assessments are aligned to the curriculum? What criteria guide that process?

Answer

Write answer here. Suggested word count is 400 words.

The Charter Holder ensures that the benchmark assessment system, (ATI-Galileo), is aligned to the ACCR standards by completing Standards Alignment Checklists for all grade levels. The district data committee then reviews the District Formative Assessments at each grade level for standards-alignment and verifies whether all ACCR standards are being assessed within the allotted time frames on the Beyond Textbooks Curriculum Calendars. Beyond Textbook partnership also guarantees that Beyond Textbooks designs the layout of Galileo Assessments annual to ensure alignment. Once the calendars and assessments have been cross-checked for verification of alignment, Curriculum Alignment Checklists are completed to verify that the district’s curriculum is aligned to the standards that will be assessed on each benchmark. The Curriculum Alignment Checklists also serve to ensure that adequate resources are available for every standard that will be assessed at each grade level. Results from both committees are recorded into the Gap Analysis so that any gaps or deficiencies in the curriculum or the assessment system can be identified and addressed.



Documentation

Provide a bulleted list of documents that serve as evidence of implementation of this process:

- *Standards Alignment Checklists*
- *Beyond Textbook Curriculum Calendars*
- *Curriculum Alignment Checklists*
- *Guarantee Statement from Beyond Textbooks via email*

Question #3: What is the Charter Holder’s ongoing process to evaluate how the assessments are aligned to the instructional methodology? What criteria guide that process?

Answer

Write answer here. Suggested word count is 400 words.

The Charter Holder’s ongoing process for evaluating the alignment of adopted assessment system with instructional methodology involves the clear and consistent communication of instructional expectations for teachers and instructional staff, ongoing professional development in assessment planning, usage, and implementation, and administrative follow-up through informal observations and formal evaluations.

At the beginning of the year, The Expectations for Assessments (located in the Instructional Process Presentation) are clearly communicated to new instructional staff during a full day of New Teacher Induction. During this full day induction, new instructional staff members are also provided with expectations and samples of how instructional methodologies should align in four major areas (i.e. curriculum, instruction, assessment and intervention). These expectations are also reviewed by site principals with all returning instructional staff during individual grade-level breakout sessions. A Galileo overview training is provided to all instructional staff members during individual grade-level breakout sessions as well.

Throughout the year, Team Leads ensure instructional methodologies are aligned to curriculum calendars and academic rigor of assessments through the uses of Unwrapped Documents. A grade-level lesson plan is also submitted to the administration team which includes daily and weekly assessment plans for the grade-level. Assistant principals evaluate the weekly lesson plans to ensure formative and benchmark assessment tools are being utilized as well as daily assessments are aligned to the academic rigor of the formative and benchmark assessments. Lesson Plan Feedback Forms are completed by assistant principals. Feedback is then returned to teachers with suggestions for improvements or modifications for use of assessment tools. The Teacher Mentor Program also provides additional



professional development and training for incoming staff or those needing additional support to effectively use of assessment tools (i.e. Galileo, Formative Assessments, DIBELS, etc).

Once a standard has been introduced and developed, and mastery is expected teachers administer the District Common Formative Assessments. After completion of assessments, grade-level teams meet in PLCs to collaborate after formative assessments and benchmark assessments. These meetings are documented through PLC Meeting Forms and Data Collection Sheets(formative data) or Data Reflection Forms (benchmark). All these forms are submitted to administration for documentation and review. Formative assessments results are recorded by classroom teachers on Data Collection Sheets to determine placement for students needing standard reteaching and enrichment.

Re-teach/Enrich, an essential component of the Beyond Textbooks program, offers a school-wide approach to aligning assessment systems and instructional methodologies in math and reading. All instructional staff members are required to follow the district-wide Re-teach/Enrich Expectations (which includes a separate instructional block on every grade-level schedule), communicated by the site principals at the beginning of the school year. The process of Re-teach/Enrich takes place at the conclusion of each standard taught. Classroom teachers administer *District Common Formative Assessments*, (DFAs), to assess student comprehension of the recently completed standard. Grade level teams and instructional support staff then meet to discuss assessment results and place students in ability groups based on performance. As the teacher moves forward with the next standard on the calendar, this previous standard is reviewed or built upon during Re-teach/Enrich sessions. After one week of Reteach/Enrich, a parallel District Formative Assessment (DFA2) can be given to evaluate changes in student growth and proficiency.

Administration then follows-up with instructional staff to ensure proper implementation of expectations and systems. Informal observations and formal evaluations of all instructional staff are conducted by principals, department heads, and assistant principals to ensure that the consistent alignment between the manner in which instruction is being delivered and the school-wide assessment system. During informal evaluations, administration and department heads monitor that instructional methodologies include a checking for understanding that is in alignment with the academic rigor of formative and benchmark assessments. During formal evaluations, the site principal review information observations, data collection sheet, data reflection forms, lesson plan feedback along with current observations to verify that there is a consistent and ongoing alignments of assessment systems and instructional methodologies for all instructional staff.

Documentation

Provide a bulleted list of documents that serve as evidence of implementation of this process:



- Expectations of Assessments
- Instructional Process Presentation
- Welcome Week Agenda (with Breakout Sessions)
- Unwrapped Document Samples
- Lesson Plan Feedback Samples
- New Teacher Induction Agenda
- Instructional Staff Binders
- Teacher Mentor Program PD Schedule
- Informal Observation Form (Classroom Teachers)
- PLC Meeting Forms
- Data Collection Sheets
- Data Reflection Sheets
- Reteach/Enrich Expectations
- Grade-level Daily Instruction Schedules
- Informal Observations
- Formal Evaluations

B. Adapted to Meet the Needs of Subgroups

Complete the table below with the Charter Holder’s applicable information. Descriptions within the table should be brief and concise. If a subgroup comprises more than 65% of the student population at all schools operated by the Charter Holder, please check the box in the exempt column, and leave that subgroup blank.

Subgroup Assessment Table

Subgroup	Exempt	How does the assessment system assess each subgroup to determine effectiveness of supplemental and/or differentiated instruction and curriculum?	List documents that serve as evidence of implementation of this process.
Students with proficiency in the bottom 25%/non-proficient students	<input type="checkbox"/>	The Charter Holder ensures that the adopted assessment system identifies the instructional and curricular needs of students with proficiency in the bottom quartile by incorporating data driven school-wide and specialized programs.	<ul style="list-style-type: none"> ● Title I Intervention Schedule ● Title I Student Progress Reports ● Data Reflection Sheets ● Child Find/Interventionist Concerns Form



Demonstration of Sufficient Progress Report

		<p>(i.e. Title 1, Targeted Tutoring, Reteach/Enrich)</p> <p>The school-wide assessment system allow monitoring of the effectiveness of intervention programs through consistent data analysis and tracking. Title I Interventionists are required to monitor the individual progress of students in which they are providing interventions. Benchmark assessments results are used to document growth and progress on individualized student progress reports. Department heads also meet with their intervention teams at the conclusion of each benchmark to discuss the continued implementation of data collection processes that will evaluate instructional and curricular effectiveness. During these meetings, interventionist review Data Reflection forms that are completed by classroom teachers. Interventionist and department heads identify patterns and trends seen for students in the bottom quartile.</p> <p>If interventionists are seeing lack of progress in individual student via their student progress reports and assessment data, the interventionist can choose to initiate a Child Find/SST meeting to evaluate classroom interventions along with create a possible intervention plan.</p>	
ELL students	<input type="checkbox"/>	<p>The Charter Holder ensures that the assessment system addresses the needs of ELL students by incorporating academic interventions and strategies into the daily education of ELL students, based on data analysis and tracking. The ELL coordinator</p>	<ul style="list-style-type: none"> ● AZELLA ● Galileo ● Student Monitoring Form ● Data Boards ● BT formative Assessments



Demonstration of Sufficient Progress Report

	<p>meets with administration to discuss data collection and evaluate the effectiveness of currently implemented curriculum and instructional strategies at the conclusion of each benchmark. All instructional staff working with ELL students will record benchmark results for the students they service in <u>Data Reflection forms</u> to develop relevant goals for instructional and curricular modifications.</p> <p>The district ELL coordinator then evaluates the current curriculum after every benchmark to assess whether specialized materials implemented by instructional staff were effective in helping ELL students meet the ACCR standards along with progress in specific standards (i.e. English Language Proficiency (ELP) Standards) for the subgroup. The <u>ILLP (Individual Language Learner Plan)</u> is the written plan in the mainstream classroom that specifies what happens, instructionally, for the particular English language learner (ELL).The English Language Proficiency (ELP) Standards and Performance Indicators are used in the instruction of ELLs on an ILLP. The identification of specific Performance Indicators is based on the review of <u>AZELLA Student Report</u> as to student’s needs and proficiency level. AZELLA proficiency levels are also tracked using the <u>ELL 70</u> report and the school-wide <u>ELL Assessment Binder</u> ring binder. The <u>ELL NEED report</u> is also pulled and distributed to teachers in order to show students with an assessment result that indicates they are less than proficient in the English Language. It is recommended that each ILLP area address four (4) to five (5)</p>	<ul style="list-style-type: none"> ● ELL NEED Report ● ELL 70 report ● ELL Binder of Assessment Information ● ILLP Sample ● ELL Data Boards ● Data Reflection Forms
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Demonstration of Sufficient Progress Report

		<p>Performance Indicators, identified for each quarter. This document must be reviewed quarterly to show the progress of the ELL student. Teachers will review Performance Indicators and revise those that the English language learner has attained. New Performance Indicators would be identified to replace those that the student has attained. Students' progress is documented in <u>Attachment B</u> of the ILLP. Results of assessments are used for progress reports, data boards, teacher evaluations, individual student progress, increasing teacher trainings, title I intervention. Negative growth results in immediate intervention, positive growth results in no change but continues progress monitoring from the department head.</p>	
Students eligible for FRL	<input checked="" type="checkbox"/>	<p>These subgroup is more than 65% of total student population at all schools operated by the Charter Holder.</p>	Not Applicable
Students with disabilities	<input type="checkbox"/>	<p>The Charter Holder ensures that the assessment system addresses the assessment needs of students with disabilities by incorporating academic programs and instructional strategies into the daily education of special education students, based on data analysis and tracking.</p> <p>The school-wide assessment system allow monitoring of the effectiveness of intervention programs through consistent data analysis and tracking. Special Education Teachers are required to</p>	<ul style="list-style-type: none"> ● Special Education Student Progress Reports ● Data Reflection Sheets ● IEP Review Meeting Notice ● IEP Review Meeting Notes



Demonstration of Sufficient Progress Report

	<p>monitor the individual progress of students in which they are providing special education services. Formative and Benchmark assessments results are used to document growth and progress on individualized <u>student progress reports</u>.</p> <p>Department head also meets with the special education team at the conclusion of each benchmark to discuss the continued implementation of data collection processes that will evaluate instructional effectiveness. During these meetings, special education teachers review <u>Data Reflection forms</u> that are completed by classroom teachers. Special Education teachers and the department head identify patterns and trends seen for students with disabilities.</p> <p>If special education teachers are seeing lack of progress in individual student via their student progress reports and assessment data, the special education teacher can choose to initiate an <u>IEP Review meeting</u> to evaluate classroom modifications and accommodations to instruction.</p>	
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C. Analyzing Assessment Data

Question #1: What is the Charter Holder’s ongoing process to collect and analyze each type of assessment data listed in the Assessment System Table in Section A and the Subgroup Assessment Table in Section B?

Answer

Write answer here. Suggested word count is 400 words.



The Charter Holder has formed a data committee to assist administration in ensuring that ongoing processes for collection and analysis of formative, benchmark and summative assessment data are established, well documented, and consistently implemented by all instructional staff throughout the school year.

Formative assessment data is evaluated by teachers in weekly/biweekly intervals according to their grade level curriculum calendars and assessment scores are recorded in Data Collection Sheets at the conclusion of each standard taught.

Instructional staff analyzes benchmark assessment data in grade level PLC meetings, which occur monthly. School-wide and grade level data is provided by the data committee using multiple report in Galileo (i.e. Aggregated Multi-Test Reports, Grade-level Student Growth and Achievement and Custom Reports). Grade-level teams are responsible for providing class and individual student data using multiple reports in Galileo (i.e. Galileo Intervention Alerts and Development Profile Reports). All of these reports are reviewed and evaluated by all instructional staff and results are recorded in Data Reflection Forms. This type of analysis allows teaching teams to make collaborative decisions about adjustments to curricular and instructional strategies that will be made in response to benchmark assessment findings. DIBELS Benchmark results are recorded by the classroom teachers (K-2nd grades) and submitted to administrators in grades K-2nd. These classroom teachers, evaluate the results alongside BT formative reading proficiency data in grade level PLC meetings, which occur monthly. This data is reviewed and evaluated by all instructional staff and results are recorded in Data Reflection Forms. This type of analysis allows K-2nd teaching teams to make collaborative decisions about adjustments to curricular and instructional strategies that will be made in response to benchmark assessment findings. Site principals and department heads meet with instructional teams after forms have been submitted to discuss data trends and findings at the school-level. Benchmark data is evaluated by principals for instructional and curricular effectiveness. Growth and proficiency reflected in benchmark data accounts for 40% of the Professional Teacher Evaluation, which is given at the conclusion of each semester.

Title 1, ELL, and special education teachers work within their departments to meet the needs of the individual students they service based on formative and benchmark data. Academic Intervention Plans (which are created modified and reviewed through the Student Study Team), ILLPs, and IEPs are followed and records kept and updated as assessment results are collected and analyzed. Directors of these subgroups evaluate their instructional support staff in the Instructional Staff Evaluation. All instructional staff analyze benchmark results for the students they service and develop relevant goals for instructional intervention or modifications based on benchmark assessment data this is documented in Student Progress Reports.

Summative data is evaluated at the end of the school year and during summer break. Data Dialogue Reflections will be completed by 3rd-8th grade teachers to evaluate summative data for both Galileo Post-test and AzMerit assessment results in grade level data meetings. K-2nd grade teachers will evaluate summative data using Galileo post-test results.



Documentation

Provide a bulleted list of documents that serve as evidence of implementation of this process:

- Data Collection Sheets
- Aggregated Multi-Test Reports
- Grade-level Student Growth and Achievement
- Custom Reports
- Galileo Intervention Alerts
- Development Profile Reports
- Data Reflection Forms
- DIBELS Benchmark Results
- Professional Teacher Evaluation
- Academic Intervention Plans
- ILLP Sample
- IEP Sample
- Instructional Staff Evaluation
- Student Progress Reports (Title I)
- Data Dialogue Reflections

Question #2: What is the Charter Holder’s ongoing process to make adjustments to curriculum based on the data analysis? What criteria guide that process?

Answer

Write answer here. Suggested word count is 400 words.

The Charter Holder’s ongoing process to make adjustments to curriculum based on data analysis is a result of close alignment between curriculum and school assessment plans.

Immediate and individual adjustments to curriculum are made by teachers and grade-level teams based on formative assessment data analysis found on the Data Collection Sheets as well as benchmark data analysis found on Data Reflection Sheets. For example, a classroom teacher may notice that 60% of her classroom were not proficient based on the District Formative Assessment that was given upon conclusion of the set days of instruction allotted through the Beyond Textbook Curriculum Calendars. This teacher would discuss with her grade-level team her results and adjust instruction and intervention curriculum accordingly. If the data show this was a trend in data for the specific standard and grade-



level, the grade-level team can submit a revision for allotted instructional time to the data committee after further analysis of grade-level curriculum, instruction and intervention.

Yearly adjustments are made at a school and district-level using benchmark and formative data. The district data committee evaluates the test blueprints of ATI-Galileo pre-tests, post-tests, and benchmark assessments to ensure that they are aligned with and include all of the ACCR standards at each grade level throughout the year. This is achieved through the use of the Standards Alignment Checklists which are completed by grade-level teachers and then submitted to the district data committee. The Data Committee then compiles misalignments and/or gaps to submit to site principals via spreadsheet (Curriculum Calendar Revision Spreadsheet and Galileo Blueprint Revision Spreadsheet) as well as Beyond Textbook for the following year. Revisions include but are not limited to the following: order/sequence of standards, time allotted for instruction of individual standards and alignment of standards and benchmark testing) Formative assessments tools are also reviewed for standards alignment and all assessments are scheduled in accordance with the curriculum calendars. The administrations, grade-level teachers, department heads and the district curriculum and data committee also evaluates the assessment system to ensure that formative, benchmark, and summative assessment tools are correlative throughout the year. The Data Committee then compiles misalignments and/or gaps to submit to site principals via spreadsheets (Curriculum Calendar Revision Spreadsheet and Galileo Blueprint Revision Spreadsheet) as well as Beyond Textbook for the following year.

Documentation

Provide a bulleted list of documents that serve as evidence of implementation of this process:

- Data Collection Sheets
- Data Reflection Sheets
- Standards Alignment Checklists
- Curriculum Calendar Revision Spreadsheet
- Galileo Blueprint Revision Spreadsheet

Question #3: What is the Charter Holder’s ongoing process to make adjustments to instruction based on the data analysis? What criteria guide that process?

Answer



Write answer here. Suggested word count is 400 words.

The Charter Holder’s process for evaluating instruction based on data analysis involves a collaborative approach among teachers, mentor teachers, department heads and site administrators. Data analysis is used to evaluate instructional effectiveness occurs in a multi-tier system. Instructional leaders, (principals, vice principals, and directors) attend off-site professional development to improve and maintain their effectiveness in coaching and providing feedback to teachers regarding their instructional strategies.

Grade-level teams analyze formative and benchmark assessment results to evaluate whether changes in instructional strategies can be made to improve student performance and teach the standards to mastery. District Formative Assessment results are evaluated by teaching teams weekly/biweekly using the Beyond Textbooks Data Collection Sheets to determine the effectiveness of current instructional strategies and assign teachers to ability groups for Reteach/Enrich. Teachers that produced the highest scores on the weekly formative assessment are assigned the lowest scoring intervention groups during Reteach/Enrich so that students who are struggling the most with the standard will receive the most effective remediation. This practice is another component of the Beyond Textbooks program that promotes data driven decision-making. Grade-level data team meetings are led by lead teachers and documented through Data Reflection Sheets as well as PLC Meeting Forms. Data Reflection Form are completed by grade level teams in response to team data discussions and submitted to site administration, who then follow up during informal observations and formal professional evaluations.

Additional measures are taken by administration, if a pattern for underperformance in a specific classroom or grade-level (i.e. Teacher Improvement Plan, Teacher Mentor Assignment and/or Required Online PD). Mentor teachers are assigned to all new instructional staff at the beginning of the year and may be assigned to teachers that require more intensive assistance. Mentor teachers observe their assigned teachers and provide regular feedback (i.e. Mentor Observation Forms and Collaboration Logs) quarterly. This feedback is used to assist teachers in developing and implementing more effective methods of instruction.

Department heads also provide ongoing professional development and coaching to improve or enhance the instructional effectiveness of all instructional staff who instruct students in specific subgroup(s). Professional development outside of original professional development calendar which is determined through data analysis of data found in but not limited to Data Reflection Forms, ILLP: Attachment B, and Special Education: Progress Reports. Areas of low growth and/achievement are targeted to improve intervention practices among instructional support staff through ongoing professional development and regular feedback from site coordinators and directors.

Documentation



Provide a bulleted list of documents that serve as evidence of implementation of this process:

- Off-site PD Certificates
- Data Collection Sheets
- Sample of documented ability groups for Reteach/Enrich
- Data Reflection Sheets
- PLC Meeting Forms
- Teacher Improvement Form
- Teacher Mentor Roster
- Online PD Certificated
- Mentor Observation Forms
- Collaboration Logs
- Sample ILLP: Attachment B
- Sample Special Education Progress Report
- Additional PD Materials/Sign-ins

AREA IV: MONITORING INSTRUCTION

Answer the questions for each of the following four sections. Provide documentation that will clearly demonstrate implementation of the processes.

A. Monitoring Instruction

Question #1: What is the Charter Holder’s ongoing process to monitor that the instruction taking place is

- Aligned with ACCRS standards,
- Implemented with **fidelity**,
- Effective throughout the year, and
- Addressing the identified needs of students in all four subgroups?

Answer

Write answer here. Suggested word count is 400 words.

The Charter Holder’s ongoing process for monitoring the instruction is a multi-tier system that continually monitors four major areas of the instructional process: Curriculum, Instruction, Assessment, and Intervention. These four areas of the instructional process are able to be closely aligned because the framework is embedded in answering Richard DuFour’s Four Essential Questions of Instruction: 1)What do we expect students to learn? 2)How will we know what students have learned? 3)How will we respond to students who aren’t learning? and 4)What will we do with students who meet the standards?



At the beginning of the year, administrators provide extensive communication and training of school-wide expectations of the instructional process as well as Richard DuFour's Four Essential Questions. This is conducted through a full day of New Teacher Induction to new instructional. During this full day induction, new instructional staff members are also provided with expectations and samples of how instructional methodologies should align in four major areas (i.e. curriculum, instruction, assessment and intervention). A copy of the Instructional Process Expectations and Presentation is placed in a binder provided to all instructional staff. These expectations are also reviewed by site principals with all returning instructional staff during individual grade-level breakout sessions. In addition, all instructional staff are provide training on Beyond Textbook 101 and 102 which provides an overview of curriculum calendars, unwrapped documents and common formative assessments. The framework of these tools within Beyond Textbooks along with school systems of evaluation Lead and mentor teachers at each site also assist in training incoming teachers in the use of curriculum, assessments as well as effective instructional and intervention practices for their grade level/subject. Once expectations are clearly communicated and training is provided, administration is able to monitor the instruction through a multi-tier system.

Throughout the year, Team Leads are the first level to ensure grade-level instruction is aligned to standards, implemented with fidelity as well as address identify needs of all subgroups. Grade-level teams are allotted daily collaborative planning time. It is during this time, Team Leads facilitate grade-level instructional, assessment and intervention planning that upholds expectations communicated to all instructional staff at the beginning of the year. A grade-level lesson plan is submitted to the administration team which includes standard-aligned objectives, daily and weekly assessment plans, instructional strategies as well as accommodations/modifications. Assistant principals evaluate the weekly lesson plans to ensure all 6 required components are present as well as ensure instructional strategies and delivery the content of the curriculum in the way that they were designed to be used and delivered. Lesson Plan Feedback Forms are completed by assistant principals. Feedback is then returned to teachers with suggestions for improvements or modifications for curriculum, instruction, assessment and/or intervention.

The Teacher Mentor Program also provides additional professional development and observations with feedback for incoming staff or those needing additional support of effective instructional strategies. This professional development is offered monthly and is aligned with Madeline Hunter's "Mastery Teaching: Increasing Instructional Effectiveness in Elementary and Secondary Schools." Mentor teachers are assigned to all new instructional staff at the beginning of the year and may be assigned to teachers that require more intensive assistance. Mentor teachers observe their assigned teachers and provide regular feedback (i.e. Mentor Observation Forms and Collaboration Logs) quarterly. This feedback is used to assist teachers in developing and implementing more effective methods of instruction. Mentors are then required to submit a copy of observations and collaboration logs to the Lead Mentor. The Lead Mentor then submits a Mentor Peer Coaching Completion Form to administration in order to verify that observation was conducted and feedback was provided in a follow-up conference. Administration then follows-up with instructional staff to ensure proper implementation of expectations and systems.



Informal observations and formal evaluations of all instructional staff are conducted by principals, department heads, and assistant principals to ensure that the consistent alignment between the manner in which instruction is being delivered and the school-wide instructional process. During informal evaluations, administration and department heads monitor that instructional methodologies include effective implementation and strategies in all areas for all students. Formal Teacher Evaluations are conducted twice a year by the principal in order to provide comprehensive feedback regarding all required teaching components to monitor the effectiveness of ACCR standards-based instruction and improve the quality of teaching in all classrooms. During formal evaluations, the site principal reviews lesson plans, data collection and instruction to verify that there is a consistent and ongoing alignments of all systems and instructional methodologies for all instructional staff. Additional measures are taken by administration, if a pattern of ineffective instruction is seen in a specific classroom or grade-level (i.e. Teacher Improvement Plan, Teacher Mentor Assignment and/or Required Online PD).

Department heads also evaluate instructional staff working with subgroup populations for the effective integration of ACCR standards into small group instruction. Lesson plans are evaluated and feedback is provided through Lesson Plan Feedback Forms. Instruction is evaluated informally using the an Instructional Staff Informal Observation form throughout the year as well as formally once a year during Instructional Staff Evaluations for specific departments.

Documentation

Provide a bulleted list of documents that serve as evidence of implementation of this process:

- Instructional Process Presentation
- Welcome Week Agenda (with Breakout Sessions)
- New Teacher Induction Agenda
- Instructional Staff Binders (w/Expectations)
- Lesson Plan Feedback Samples
- Teacher Mentor Program PD Schedule
- Peer Mentor Program Roster
- Mentor Teacher Observation Forms
- Collaboration Logs
- Mentor Peer Coaching Completion Form
- Informal Observation Form (Classroom Teachers and Additional Instructional Staff)
- Formal Evaluations (Classroom Teachers and Additional Instructional Staff)
- Teacher Improvement Plan Sample
- Online Certificate of Completion



Question #2: How is the Charter Holder monitoring instruction to ensure that it is leading all students to mastery of the standards?

Answer

Write answer here. Suggested word count is 400 words.

The Charter Holder is able to ensure that instruction leads to all students mastering standards by providing and communicating an aligned instructional process framework, monitoring effective instruction and providing ongoing feedback and training for effective instruction. The Charter Holder’s ongoing process for monitoring the instruction is a multi-tier system that continually monitors four major areas of the instructional process: Curriculum, Instruction, Assessment, and Intervention. These four areas of the instructional process are able to be closely aligned because the framework is embedded in answering Richard DuFour’s Four Essential Questions of Instruction: 1)What do we expect students to learn? 2)How will we know what students have learned? 3)How will we respond to students who aren’t learning? and 4)What will we do with students who meet the standards?

This framework is clearly communicated to all instructional staff at the beginning of the year through New Teacher Induction (for new instructional staff) and Welcome Week Professional Developments (for all instructional staff). All grade-level standards are taught to mastery by supplying instructional staff with a close alignment between Beyond Curriculum Calendars and school assessment plans. Immediate and individual adjustments to instruction and curriculum are made by teachers and grade-level teams based on formative assessment data analysis found on the Data Collection Sheets as well as benchmark data analysis found on Data Reflection Sheets. Grade-level teams analyze formative and benchmark assessment results to evaluate whether changes in instructional strategies can be made to improve student performance and teach the standards to mastery. District Formative Assessment results are evaluated by teaching teams weekly/biweekly using the Beyond Textbooks Data Collection Sheets to determine the effectiveness of current instructional strategies and plan interventions of ability groups for Reteach/Enrich. Teachers that produced the highest scores on the weekly formative assessment are assigned the lowest scoring intervention groups during Reteach/Enrich. This allows students who are struggling the most to be provided with the most effective interventional instruction and remediation. Students who have not mastered the standard after interventional instruction through Reteach/Enrich can continue to receive remedial instruction through Title 1 services and/or after school tutoring. If a



teacher notices major gaps in student proficiency and lack of sufficient progress, the student may be referred to the schoolwide Child Find Process/Student Study Team to receive additional intervention.

Instruction is monitored at multi-levels to ensure effective instruction is being provided. All students are led to mastery of the standards as a result of this effective instruction. Assistant principals evaluate the weekly lesson plans to ensure all 6 required components are present as well as ensure instructional strategies and delivery the content of the curriculum in the way that they were designed to be used and delivered. Lesson Plan Feedback Forms are completed by assistant principals. Feedback is then returned to teachers with suggestions for improvements or modifications for curriculum, instruction, assessment and/or intervention. Department heads also evaluate instructional staff working with subgroup populations for the effective integration of ACCR standards into small group instruction. Lesson plans are evaluated and feedback is provided through Lesson Plan Feedback Forms. Instruction is evaluated informally using the an Instructional Staff Informal Observation form throughout the year as well as formally once a year during Instructional Staff Evaluations for specific departments. Informal observations and formal evaluations of all instructional staff are conducted by principals, department heads, and assistant principals to ensure that the consistent alignment of the instructional process as well as the use effective instruction strategies for all students (including students found in subcategories. During informal evaluations, administration and department heads monitor that instructional methodologies include effective implementation and strategies in all areas for all students. Mentor teachers observe their assigned teachers and provide regular feedback (i.e. Mentor Observation Forms and Collaboration Logs) quarterly. This feedback is used to assist teachers in areas of planning and preparation, instruction, classroom environment and professional responsibilities. Administration then follows-up with instructional staff to ensure proper implementation of expectations and systems. Formal Teacher Evaluations are conducted twice a year by the principal in order to provide comprehensive feedback regarding all required teaching components to monitor the effectiveness of ACCR standards-based instruction and improve the quality of teaching in all classrooms. During formal evaluations, the site principal reviews lesson plans, data collection and instruction to verify that there is a consistent and ongoing alignments of all systems and instructional methodologies for all instructional staff. Additional measures are taken by administration, if a pattern of ineffective instruction is seen in a specific classroom or grade-level (i.e. Teacher Improvement Plan, Teacher Mentor Assignment and/or Required Online PD).

Documentation

Provide a bulleted list of documents that serve as evidence of implementation of this process:

- Instructional Process Presentation
- Welcome Week Agenda (with Breakout Sessions)
- New Teacher Induction Agenda
- Instructional Staff Binders
- Beyond Textbook Curriculum Calendars



- Data Collection Sheets
- Data Reflection Sheets
- Sample of classroom ability groups (for Reteach/Enrich)
- Child Find Sample File
- Lesson Plan Feedback Samples
- Teacher Mentor Program PD Schedule
- Peer Mentor Program Roster
- Mentor Teacher Observation Forms
- Collaboration Logs
- Mentor Peer Coaching Completion Form
- Informal Observation Form (Classroom Teachers and Additional Instructional Staff)
- Formal Evaluations (Classroom Teachers and Additional Instructional Staff)
- Teacher Improvement Plan Sample
- Online Certificate of Completion

B. Evaluating Instructional Practices

Question #1: How does the Charter Holder evaluate the instructional practices of all staff?

Answer

Write answer here. Suggested word count is 400 words.

Instruction is monitored at multi-levels to ensure effective instruction is being provided. All students are led to mastery of the standards as a result of this effective instruction. Assistant principals evaluate the weekly lesson plans to ensure all 6 required components are present as well as ensure instructional strategies and delivery the content of the curriculum in the way that they were designed to be used and delivered. Lesson Plan Feedback Forms are completed by assistant principals. Feedback is then returned to teachers with suggestions for improvements or modifications for curriculum, instruction, assessment and/or intervention. Department heads also evaluate instructional staff working with subgroup populations for the effective integration of ACCR standards into small group instruction. Lesson plans are evaluated and feedback is provided through Lesson Plan Feedback Forms. Instruction is evaluated informally using the an Instructional Staff Informal Observation form throughout the year as well as formally once a year during Instructional Staff Evaluations for specific departments. Informal observations and formal evaluations of all instructional staff are conducted by principals, department heads, and assistant principals to ensure that the consistent alignment of the instructional process as well as the use effective instruction strategies for all students (including students found in



subcategories. During informal evaluations, administration and department heads monitor that instructional methodologies include effective implementation and strategies in all areas for all students. Mentor teachers observe their assigned teachers and provide regular feedback (i.e. Mentor Observation Forms and Collaboration Assessment Logs) quarterly. This feedback is used to assist teachers in areas of planning and preparation, instruction, classroom environment and professional responsibilities. Administration then follows-up with instructional staff to ensure proper implementation of expectations and systems. Formal Teacher Evaluations are conducted twice a year by the principal in order to provide comprehensive feedback regarding all required teaching components to monitor the effectiveness of ACCR standards-based instruction and improve the quality of teaching in all classrooms. During formal evaluations, the site principal reviews lesson plans, data collection and instruction to verify that there is a consistent and ongoing alignments of all systems and instructional methodologies for all instructional staff. Additional measures are taken by administration, if a pattern of ineffective instruction is seen in a specific classroom or grade-level (i.e. Teacher Improvement Plan, Teacher Mentor Assignment and/or Required Online PD).

Department heads also evaluate instructional staff working with subgroup populations for the effective integration of ACCR standards into small group instruction. Lesson plans are evaluated and feedback is provided through Lesson Plan Feedback Forms. Instruction is evaluated informally using the an Instructional Staff Informal Observation form throughout the year as well as formally once a year during Instructional Staff Evaluations for specific departments.

Documentation

Provide a bulleted list of documents that serve as evidence of implementation of this process:

- Lesson Plan Feedback Samples
- Teacher Mentor Program PD Schedule
- Peer Mentor Program Roster
- Mentor Teacher Observation Forms
- Collaboration Logs
- Mentor Peer Coaching Completion Form
- Informal Observation Form (Classroom Teachers and Additional Instructional Staff)
- Formal Evaluations (Classroom Teachers and Additional Instructional Staff)
- Teacher Improvement Plan Sample
- Online Certificate of Completion



Question #2: What is the Charter Holder’s ongoing process to identify the quality of instruction?

Answer

Write answer here. Suggested word count is 400 words.

The Charter Holder’s ongoing process for identifying quality instruction is founded in research-based methodologies and pedagogy. The Charter holder continually monitors four major and provides professional development in elements of the schoolwide instructional process (i.e. Curriculum, Instruction, Assessment, and Intervention). These four areas of the instructional process are able to be closely aligned because the framework is embedded in answering Richard DuFour’s Four Essential Questions of Instruction: 1)What do we expect students to learn? 2)How will we know what students have learned? 3)How will we respond to students who aren’t learning? and 4)What will we do with students who meet the standards? This framework is then reinforced with a researched-based book (i.e. Madeline Hunter’s “*Mastery Teaching: Increasing Instructional Effectiveness in Elementary and Secondary Schools*”) to guide self-study and additional professional development for quality instruction. Quality of instruction is also evaluated using the results of the assessment system. Data is collected and evaluated based on student mastery.

The Charter Holder’s process for evaluating the quality of instruction involves checking for the presence of relevant instructional practices and methodologies within the lesson plans by conducting Lesson Plan Evaluations w/ feedback and ensuring that these practices are demonstrated in the classroom by conducting informal observations and formal evaluations. Lesson plans are required to include all instructional practices employed for each standard (i.e. Teaching and Learning Strategies) as well as the assessment being utilized for every lesson. Informal observations offer immediate feedback to teachers, and adjustments or modifications are recommended and followed up on by school administration. Peer Mentor observations are conducted quarterly, in order to collaboratively provide feedback for individual strengths of weakness of new or struggling instructional staff. Formal Teacher Evaluations are conducted twice a year by the principal in order to provide comprehensive feedback regarding all required teaching components to monitor the effectiveness of ACCR standards-based instruction and improve the quality of teaching in all classrooms. Evaluation tools follow the Danielson Framework for quality teaching. Ratings are based on cited evidence (quantitative and observable) and align to an evaluation rubric. Pre-evaluation Lesson Reflections are submitted to site principal to give context, background and clarity prior to the evaluation. Evaluation rating and feedback are reviewed and discussed in a post-evaluation conference.

Documentation

Provide a bulleted list of documents that serve as evidence of implementation of this process:

- Lesson Plan Feedback Samples
- Teacher Mentor Program PD Schedule



- Mentor Teacher Observation Forms
- Informal Observation Form (Classroom Teachers and Additional Instructional Staff)
- Formal Evaluations (Classroom Teachers and Additional Instructional Staff)
- Evaluation Rubric
- Pre-evaluation Lesson Reflection
- Post-Evaluation Conference Sign-up Sheets

Question #3: How does the evaluation process identify the individual strengths, weaknesses, and needs of instructional staff?

Answer

Write answer here. Suggested word count is 400 words.

The process for evaluating individual strengths, weaknesses, and needs are established by providing consistent and detailed teacher feedback regarding both documented (lesson plans) and observable instructional practices. The Charter Holder will continue the use of a system in which regular dialoguing occurs between instructional staff and site principals, assistant principals, department heads, and mentor teachers, to further improve the quality of teaching practices. The Charter Holder currently provides teacher feedback by observing classroom lessons both formally in and informally. Informal observations offer immediate feedback to teachers, and adjustments or modifications are recommended and followed up on by school administration. Peer Mentor observations are conducted quarterly, in order to collaboratively provide feedback for individual strengths of weakness of new or struggling instructional staff through the Collaboration Assessment Logs. Post conference feedback is given to prepare teachers and instructional support staff for instructional expectations and allow opportunities for additional questions and responses after the evaluation has occurred. Formal Teacher Evaluations are conducted twice a year by the principal in order to provide comprehensive feedback regarding all required teaching components to monitor the effectiveness of ACCR standards-based instruction and improve the quality of teaching in all classrooms. Evaluation tools follow the Danielson Framework for quality teaching. During formal evaluations, the site principal reviews lesson plans, data collection and instruction to verify that there is a consistent and ongoing alignments of all systems and instructional methodologies for all instructional staff. An evaluation rating along with feedback to teachers in areas of planning and preparation, instruction, classroom environment, data/student performance and professional responsibilities. Ratings are based on cited evidence (quantitative and observable) and align to an evaluation rubric. Evaluation rating and feedback are reviewed and discussed in a post-evaluation conference. During this time instructional staff are able to have a dialogue with site principal about observed strengths and weaknesses as well as create a plan for specific needs.



Demonstration of Sufficient Progress Report

The data collected from informal observations and formal evaluations provides teachers, site administrators, and district-wide leaders with valuable information that will serve to improve instructional effectiveness. When the quality of instruction is low, the school administration responds with a clear action plan for teachers that will redefine or clarify instructional expectations. Additional measures are taken by administration, if a pattern of ineffective instruction is seen in a specific classroom or grade-level or documented through Teacher Improvement Plan, Teacher Mentor Assignment, Staff Meeting Agendas, Instructional Staff Emails and/or Required Additional PD. Administration also provided follow-up of the action plan through more frequent informal observations. When the quality of instruction meets or surpasses expectations, the administration responds by building mentorship or training roles for the teachers that offer a wealth of knowledge and experience to new or struggling teachers. Teachers who step into these roles as Mentors or Trainers are able to receive an administrative school stipend.

Documentation

Provide a bulleted list of documents that serve as evidence of implementation of this process:

- Informal Observation Form (Classroom Teachers and Additional Instructional Staff)
- Mentor Teacher Observation Forms
- Collaboration Logs
- Mentor Peer Coaching Completion Form
- Formal Evaluations (Classroom Teachers and Additional Instructional Staff)
- Evaluation Rubric
- Post-evaluation Sign-up Sheets
- Teacher Improvement Plan Sample
- Staff Meeting Agendas
- Instruction Staff Email Samples
- Online Certificate of Completion

C. Adapted to Meet the Needs of Subgroups

Complete the table below with the Charter Holder’s applicable information. Descriptions within the table should be brief and concise. If a subgroup comprises more than 65% of the student population at all schools operated by the Charter Holder, please check the box in the exempt column, and leave that subgroup blank.

Subgroup Monitoring Instruction Table

Subgroup	Exempt	What is the Charter Holder’s ongoing process to evaluate supplemental instruction targeted to	List documents that serve as evidence of implementation of this process.
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		address the needs of students in the following subgroups?	
<p>Traditional Schools: Students with proficiency in the bottom 25%</p> <p>Alternative schools: Non-proficient students</p>	<input type="checkbox"/>	<p>Lesson plans submitted by classroom teachers weekly in order to allow instructional support staff(i.e. interventionist) to create <u>supplemental lesson plans</u> while servicing students in the bottom quartile(i.e. Title I, ELL and students with disabilities where applicable). The director monitors that all classroom teachers are submitting lesson plans weekly to the department this is documented within a <u>spreadsheet</u>. Supplemental lessons include calendared standards and objectives, academic intervention strategies for each standard being taught, and the supplemental curriculum being utilized. Interventionist are then required to submit supplemental lesson plans to the Title I Director. Director then provides Lesson Plan Feedback. <u>Classroom informal observations</u> and <u>formal evaluations</u> conducted by Title I Director for Interventionist. Both the observation and evaluation tools are modified in order to evaluated the specific expectations for quality supplemental instruction. The data collected from informal observations and formal evaluations provides teachers, site administrators, and district-wide leaders with valuable information that will serve to improve instructional effectiveness. When the quality of instruction is low, the school administration and department heads responds with a clear action plan for <u>additional support and/or professional development specializing in supplemental instruction for subgroups</u>.</p>	<ul style="list-style-type: none"> ● General Education Lesson Plan Submission Spreadsheet ● Supplemental Lesson Plans ● Lesson Plan Feedback ● Instructional Staff/Interventionist Informal Observations ● Instructional Staff/Interventionist Formal Evaluations ● Additional PD Specialized for Subgroup



<p>ELL Students</p>	<p>□</p>	<p>ELL Site Coordinator evaluates teacher lesson plans to ensure that the ELP Standards, the ILLPs, and the Progress reports match and are showing growth. Teacher’s <u>lesson plans</u> must contain which Performance Indicators from the ILLP will be used to differentiate the instruction for the student. The ELL Site Coordinator ensures that the ILLP implementation process is being completed and updated quarterly by completing the <u>ILLP Monitoring form</u>. The ELL Site Coordinator ensures that the ILLP implementation process is being completed and updated quarterly by completing the ILLP Monitoring form.</p> <p>Title I Interventionist work with ELL students based on proficiency levels and instruction is monitored by using Galileo. If interventionists or ELL Director are seeing lack of progress in individual student via their Title I Student Progress reports and assessment data, the interventionist can choose to initiate a <u>Child Find/SST meeting</u> to evaluate classroom interventions along with create a possible intervention plan.</p> <p>Supplementary instruction is evaluated using progress reports, <u>Classroom informal observations</u> and <u>formal evaluations</u> conducted by administration for teachers and the Title I Director for Interventionist. Both the observation and evaluation tools are modified in order to evaluated the specific expectations for quality supplemental instruction inside and outside the general education classroom. The data collected from informal observations and</p>	<ul style="list-style-type: none"> ● ILLP Monitoring Form ● Quarterly Subgroup Lesson Plan Evaluation Form ● Child Find Meeting Notes ● Informal Observations ● Formal Evaluations ● Additional PD Specialized for Subgroup
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Demonstration of Sufficient Progress Report

		formal evaluations provides teachers, site administrators, and district-wide leaders with valuable information that will serve to improve instructional effectiveness. When the quality of instruction is low, the school administration and department heads responds with a clear action plan for <u>additional support and/or professional development specializing in supplemental instruction for subgroups.</u>	
Students eligible for FRL	<input checked="" type="checkbox"/>	These subgroup is more than 65% of total student population at all schools operated by the Charter Holder.	Not Applicable
Students with disabilities	<input type="checkbox"/>	Lesson plans are submitted to the department head by classroom teachers weekly in order to allow instructional support staff(i.e. Special Education Teachers) to collaborate with general education teachers on modifications and accommodations being made for students with disabilities. The director monitors that all classroom teachers are submitting lesson plans weekly to the department this is documented within a <u>spreadsheet</u> . <u>Collaboration conferences/meetings</u> are held on a need basis for General Education Teachers struggling to develop appropriate supplemental and/or differentiated instruction based on needs of students with disabilities. Classroom informal observations and	<ul style="list-style-type: none"> ● General Education Lesson Plan Submission Spreadsheet ● IEP reviews ● IEP Meeting Notes ● Collaboration Conference Meeting Notes ● Informal Observations ● Formal Evaluations ● Action Plan Samples via email ● Additional PD Specialized for Subgroup



		<p>formal evaluations conducted by Title I Director for Interventionist. Both the observation and evaluation tools are modified in order to evaluated the specific expectations for quality supplemental instruction.</p> <p>The special education director monitors the progress of students in Special Education after each <u>quarterly benchmark</u> and/or <u>department progress reports</u>. It is during this time the director assesses whether the specific supplemental instruction implemented both by general education and special education staff was effective in helping students with disabilities meet or show growth on the ACCR standards based on individual abilities. Any supplemental instruction found insufficient for meeting the academic needs of students with disabilities is addressed by the IEP team (i.e. General Education Teachers, Special Education teacher, Special Education Director, Parent/Guardian and Speech Language Pathologist) during an <u>IEP review</u> meeting.</p> <p>All instructional staff working with students with disabilities are evaluated by the site administration and department head for providing appropriate supplemental instruction through <u>informal observations and formal evaluations</u>. The data collected from informal observations and formal evaluations provides teachers, site administrators, and district-wide leaders with valuable information that will serve to improve instructional effectiveness. When the quality of instruction is low, the school administration and department heads responds with a clear</p>	
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Demonstration of Sufficient Progress Report

		<p>action plan for additional support and/or professional development specializing in supplemental instruction for subgroups. These <u>additional measures are documented through email and/or handouts.</u></p>	
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D. Providing Feedback that Develops the Quality of Teaching

Question #1: How does the Charter Holder analyze information about strengths, weaknesses, and needs of instructional staff?

Answer

Write answer here. Suggested word count is 400 words.

The Charter Holder analyzes the strengths and needs of all instructional staff formally, (Professional Teacher Evaluation, Instructional Staff Evaluation), and informally, (Classroom Walkthroughs, Informal Observations and Mentor Observations). Pre/post conference feedback will be provided to all instructional staff as part of the evaluation process. Teachers and interventionists will complete Pre-Evaluation Lesson Reflection Forms and share them with administrators during post-conferences to open a dialogue that will further develop the information about specific strengths, weaknesses and needs of individual instructional staff. Formal Evaluation tools follow the Danielson Framework for quality teaching. During formal evaluations, the site principal reviews lesson plans, data collection and instruction to verify that there is a consistent and ongoing alignments of all systems and instructional methodologies for all instructional staff. An evaluation rating along with feedback to teachers in areas of planning and preparation, instruction, classroom environment, data/student performance and professional responsibilities. Ratings are based on cited evidence (quantitative and observable) and align to an evaluation rubric. Evaluation rating and feedback are reviewed and discussed in a post-evaluation conference.

Documentation

Provide a bulleted list of documents that serve as evidence of implementation of this process:

- Informal Observation Form (Classroom Teachers and Additional Instructional Staff)
- Classroom Walk-through Form
- Mentor Teacher Observation Samples
- Pre-Evaluation Lesson Reflection Forms



- Formal Evaluations (Classroom Teachers and Additional Instructional Staff)
- Evaluation Rubric
- Post-Evaluation Conference Sign-up Sheets

Question #2: How is the analysis used to provide feedback to instructional staff on strengths, weaknesses, and learning needs based on the evaluation of instructional practices?

Answer

Write answer here. Suggested word count is 400 words.

The Charter Holder provides teacher feedback by observing classroom lessons both formally, (Professional Teacher Evaluation, Instructional Staff Evaluation), and informally, (Classroom Walkthroughs, Informal Observations and Mentor Observations). Teachers and interventionists will complete Pre- Evaluation Lesson Reflection Forms and share them with administrators during post-conferences to open a dialogue that will further develop the information about specific strengths, weaknesses and needs of individual instructional staff. An evaluation rating along with feedback to teachers in areas of planning and preparation, instruction, classroom environment, data/student performance and professional responsibilities. Ratings are based on cited evidence (quantitative and observable) and align to an evaluation rubric. Evaluation rating and feedback are reviewed and discussed in a post-evaluation conference. During this time instructional staff are able to have a dialogue with site principal about observed strengths and weaknesses as well as create a plan for specific needs.

The data collected from informal observations and formal evaluations provides teachers, site administrators, and district-wide leaders with valuable information that will serve to improve instructional effectiveness. When the quality of instruction is low, the school administration responds with a clear action plan for teachers that will redefine or clarify instructional expectations. Additional measures are taken by administration, if a pattern of ineffective instruction is seen in a specific classroom or grade-level or documented through Teacher Improvement Plan, Teacher Mentor Assignment, Staff Meeting Agendas, Instructional Staff Emails and/or Required Additional PD. Administration also provided follow-up of the action plan through more frequent informal observations. When the quality of instruction meets or surpasses expectations, the administration responds by building mentorship or training roles for the teachers that offer a wealth of knowledge and experience to new or struggling teachers. Teachers who step into these roles as Mentors or Trainers are able to receive an administrative school stipend. The Teacher Mentor Program has been established to provide additional opportunities for experienced teachers to work with new or struggling teachers and provide regular feedback and instructional support to address learning needs.



These feedback tools serve to identify individual strengths in instructional effectiveness as well as areas of need where additional coaching and mentoring would be beneficial. Informal Observations from administration as well as observations given by Teacher Mentors will be followed up with debriefing sessions to allow opportunities for further discussion and professional recommendations. These meetings are documented through observation follow-up emails, collaboration assessment logs, and/or Mentor Peer Coaching Completion Form. Post conferences accompany every formal evaluation to open a more extensive dialogue between teachers and administrators in order to clarify performance expectations.

Documentation

Provide a bulleted list of documents that serve as evidence of implementation of this process:

- Informal Observation Form (Classroom Teachers and Additional Instructional Staff)
- Classroom Walk-through Form
- Pre-Evaluation Lesson Reflection Forms
- Teacher Development/Improvement Plan Sample
- Staff Meeting Agendas Samples
- Instructional Staff Email Samples
- Administrative School Stipend Sample (for trainer)
- Formal Evaluations (Classroom Teachers and Additional Instructional Staff)
- Evaluation Rubric
- Post-Evaluation Conference Sign-up Sheets
- Mentor Teacher Observation Samples
- Mentor Peer Coaching Completion Form
- Collaborative Assessment Log Samples



AREA V: PROFESSIONAL DEVELOPMENT

Answer the questions for each of the following four sections. Provide documentation that will clearly demonstrate implementation of the processes.

A. Development of the Professional Development Plan

Question #1: What is the Charter Holder's ongoing process to determine what professional development topics will be covered throughout the year? What data and analysis is utilized to make those decisions?

Answer

Write answer here. Suggested word count is 400 words.

The Charter Holder's professional development plan is developed according to the needs of all grade levels and subgroups district-wide. At the conclusion of the year, all instructional staff are given a survey of a variety of possible professional developments for the following school year; survey results are then aggregated to determine the highest preference from instructional staff. Then, a comprehensive Needs Assessment is conducted at the beginning of each school year to determine the professional development needs of instructional staff at each grade level. Administration and department heads analyze the results of the Needs Assessment and identify the site-specific needs of instructional staff. The site principals also evaluate data taken from walkthrough observations and professional teacher evaluations to identify specific areas in which teachers have shown a consistent need for improvement. Once these forms of data and input have been analyzed, the administrators arrange specific professional development trainings that are tailored to the needs of their campuses.

A Professional Development Calendar is created and distributed to teachers and instructional support staff at the beginning of the school year and updated at the end of the first semester. All instructional staff members are required to attend school-wide professional development. All school calendars (i.e. Assessment Calendar, Teacher Mentor PD/Events Calendar, School Events Calendar, Staff Meeting Calendar, Committee Calendar and Professional Development Calendar) are combined to one master calendar as distributed both electronically and in a desk calendar for all instructional staff. Professional Development time is designated monthly on the fourth Wednesday as every month. This time and date is designated to ensure that all instructional staff members will be in attendance. Administration conducts Professional development surveys throughout the school year to determine whether teachers are in need of additional training in specific areas that have not been identified or addressed. When instructional needs arise for additional professional development that has not been scheduled within the current Professional Development Calendars, instructional staff in need of this training will attend off-site professional development trainings. Instructional leaders (grade level team leads, teacher mentors, site coordinators, directors/department heads) will also be assigned to attend these off-site trainings and then provide *in-house presentations* for all instructional staff. The site principals will continue to evaluate data taken from the Needs Assessments to identify specific areas in which teachers



have identified and requested curricular and instructional training and determine the selection of future or ongoing professional development.

The Teacher Mentor Program also provides additional professional development and for incoming staff or those needing additional support of effective instructional strategies. This professional development is offered monthly and is aligned with Madeline Hunter’s “Mastery Teaching: Increasing Instructional Effectiveness in Elementary and Secondary Schools.” A Teacher Mentor Program Event Calendar is created over the summer with administration and peer mentors; this calendar is distributed to all new staff members at the beginning of the year during the New Teacher Induction. A portion of the monthly sessions are designated to address the current needs of mentees as well. Mentees can voice these needs to mentors at the end of each session. If mentors see a trend or greater need for additional professional development, the following Teacher Mentor Program will be modified.

Documentation

Provide a bulleted list of documents that serve as evidence of implementation of this process:

- Professional Development Teacher Survey
- PD Survey Results
- Comprehensive Needs Assessment
- Professional Development Calendar
- Master Calendar
- Additional Professional Development Survey Samples
- Teacher Mentor Program (TMP) Event Calendar
- TMP PD Presentation Samples

Question #2: What is the Charter Holder’s ongoing process to ensure the professional development plan is aligned with instructional staff learning needs? What criteria are used to make those determinations?

Answer

Write answer here. Suggested word count is 400 words.

All professional development for the 2015-2016 school year has been aligned to the learning needs of instructional staff in accordance with the results of the Comprehensive Needs Assessment and Professional Development Teacher Survey. Once the Needs Assessment and survey results are recorded and analyzed, results are shared with lead teachers, department heads, site administrators and mentor teachers for each campus. Site principals will select and follow through with the identified needs of each grade level and subgroups. The Mentor Teachers and Team Leads will communicate with site principals



throughout the school year to arrange for any additional professional development trainings that are aligned to the needs of teachers as they arise. Site principals also use teacher surveys and evaluation data to determine the ongoing professional development needs of teachers. The professional development plan is tailor-made to address the greatest needs of teachers and instructional support staff at all grade levels, calendared by site principals in the Professional Development Calendar and updated as needed.

The Teacher Mentor Program also provides additional professional development and for incoming staff or those needing additional support of effective instructional strategies. This professional development is offered monthly and is aligned with Madeline Hunter’s “Mastery Teaching: Increasing Instructional Effectiveness in Elementary and Secondary Schools.” A Teacher Mentor Program Event Calendar is created over the summer with administration and peer mentors; this calendar is distributed to all new staff members at the beginning of the year during the New Teacher Induction. A portion of the monthly sessions are designated to address the current needs of mentees as well. Mentees can voice these needs to mentors at the end of each session. If mentors see a trend or greater need for additional professional development, the following Teacher Mentor Program will be modified.

Documentation

Provide a bulleted list of documents that serve as evidence of implementation of this process:

- Professional Development Teacher Survey
- PD Survey Results
- Comprehensive Needs Assessment
- Professional Development Calendar
- Master Calendar
- Additional Professional Development Survey Samples
- Teacher Mentor Program (TMP) Event Calendar
- Mentor Teacher Emails (for changes/additions to PD)
- TMP PD Presentation Samples

Question #3: What is the Charter Holder’s ongoing process to address the areas of high importance in the professional development plan? How are the areas of high importance determined?

Answer

Write answer here. Suggested word count is 400 words.



The professional development plan addresses areas of high importance by identifying the most common needs of all instructional staff, as well as grade level and department specific needs, which are all identified by the Needs Assessment and Teacher PD Survey results. Additional professional development needs will be identified by additional data collected by principals/department heads from teacher surveys, informal observations, and Professional Teacher Evaluations.

Requests for specific professional development from teachers/instructional staff during the year are evaluated by the teacher mentors, department heads and site principals to determine whether all instructional staff would benefit from the training, or if it only pertains to select teachers, grade levels, or departments.

Professional Development Surveys are conducted throughout the year to identify quality of professional development given as well as determine additional requests/needs for training in curriculum, assessment, or instructional effectiveness. If the professional development requested applies to or meets the needs of the majority of the instructional staff, on-site training will be scheduled and added to the Professional Development Calendar. If the request applies only to specific grade levels or departments, off-site training will be arranged for those small groups or individuals. Site principals continue to evaluate data taken from walkthrough observations and Formal Teacher Evaluations to identify specific areas in which teachers have shown a consistent need for improvement throughout the duration of the school year to ensure teachers and instructional support staff are well equipped to teach the ACCR standards to mastery.

Documentation

Provide a bulleted list of documents that serve as evidence of implementation of this process:

- Professional Development Teacher Survey
- PD Survey Results
- Comprehensive Needs Assessment
- Additional Professional Development Survey Samples
- Informal Observations
- Formal Teacher Evaluations
- Professional Development Calendar

B. Adapted to Meet the Needs of Subgroups

Question #1: Identify how the Charter Holder provides professional development to ensure instructional staff is able to address the needs of students in all four subgroups.



Answer

Write answer here. Suggested word count is 400 words.

The Charter Holder provides ongoing professional development that addresses the needs of students in all subgroups through school-wide on-site, and specialized off-site training for all instructional staff members who work with these student populations. Additional in-house training is provided for instructional staff working with each of the subgroup student populations by department heads and administration at the beginning of the year during the Welcome Week for all instructional Staff as well as throughout the year. A specialized Child Find/RTI training to all instructional staff at the beginning of the year as well.

School-wide systems of ongoing professional development are designed to ensure that all instructional staff working with students identified in any of the subgroup receives appropriate tools and resources to improve student growth and achievement. Teachers and grade-levels are able to self-monitor effectiveness of instruction to all students and subgroups through Data Reflections Forms which are completed at the conclusion of each benchmark. In addition to the school-wide professional development plan, department heads, mentor teachers and teachers that work with students in each of the subgroups will attend off-site professional development to further refine the specialized components of their teaching fields. For example, Title I, Special Education and ELL Departments attended monthly specialized reading professional developments. In-house training specialized for subgroups is then provided for all instructional staff based on information and resources gained through off-site professional development. The director of federal programs provides professional development in instructional strategies that enhance the teaching practices of all staff working with students in each of the subgroups.

Documentation

Provide a bulleted list of documents that serve as evidence of implementation of this process:

- Welcome Week Agenda
- In-house Specialized PD Sign-in Sheets (for all subgroups)
- Data Reflection Forms
- Monthly Reading Training RSVPs via email
- Off-site Professional Development Certificates of Completion
- Professional Development Calendar

C. Supporting High Quality Implementation



Demonstration of Sufficient Progress Report

Question #1: What is the Charter Holder's ongoing process to provide **support** to the instructional staff on the high quality implementation of the strategies learned in professional development? What does this support include?

Answer

Write answer here. Suggested word count is 400 words.

Staff members are given a Strategy Checklist at the beginning of every professional development. This form allows teacher to document ideas, resources and strategies from specific professional developments. On this form teachers are also able to conduct a short reflection of the implementation of the strategies, resources and ideas in their classroom. As a result, teachers are able to self-monitor and make immediate adjustments in their classroom. A staff survey is also conducted at the end of every professional development to determine staffs comfort level in implementing new methodologies and strategies. If there is a large need for additional training, a follow-up session will be schedule for all instructional staff or utilizing the Mentor Teacher Program. Once a majority of staff members feel comfortable with implementing the instruction, administration will follow-up with Classroom Walkthroughs to determine the quality of implementation in the classroom along with providing feedback to individual instructional staff. Additional professional development resources are provided to teachers who require further assistance with the implementation of strategies. These may include assigning reading from school books (i.e. "Teach Like a Champion" or "Mastery Teaching: Increasing Instructional Effectiveness in Elementary and Secondary Schools.") academic journals/articles, more intensive instructional coaching, and/or follow up professional development sessions. All of these supports are follow-up with a post conference held with a member of administration. Instructional leaders, (principals, vice principals, and directors) attend off-site professional development to improve and maintain their effectiveness in coaching and providing feedback to teachers regarding their instructional strategies. This ongoing process allows teachers and administrators to more closely evaluate whether instructional strategies introduced within professional development trainings are being implemented with fidelity.

Documentation

Provide a bulleted list of documents that serve as evidence of implementation of this process:

- Classroom Strategy Checklist
- Staff Surveys and Results
- In-house PD Sign-in Sheets
- Classroom Walkthroughs
- Teach Like a Champion Sample Copy
- Mastery Teaching: Increasing Instructional Effectiveness in Elementary and Secondary Schools Copy
- Support Book Order/Invoices
- Off-site Professional Development Certificates of Completion



Question #2: What is the Charter Holder’s ongoing process to identify concrete resources, necessary for high quality implementation, for instructional staff?

Answer

Write answer here. Suggested word count is 400 words.

The Charter Holder regularly provides financial support or tangible items to aid in implementation of professional development strategies. Instructional leaders, (principals, vice principals, and directors) take into consideration the need of concrete resources while planning professional development for the year. Once the Professional Development Calendar is finalized at the beginning of the year, administration, department heads and mentor teachers meet to create a Professional Development Supply Spreadsheet. This spreadsheet includes materials that will be needs to ensure high quality training and implementation of professional developments. Since the Professional Development Calendar is a working document which is modified based on needs of staff, the supply spreadsheet also becomes a working document that is maintained by administration. Changes are made based on professional developments and request from department heads and mentor teachers. Request are documented through a Purchase Request Form and approved by administration. Any Purchase Request Forms that exceed \$2,000 must be approved by Superintendent. Administrative stipends for in-house professional developments are maintained and approved by site principal, district federal grants/program coordinator and district office.

Documentation

Provide a bulleted list of documents that serve as evidence of implementation of this process:

- Professional Development Calendar
- Professional Development Supply Spreadsheet
- Purchase Request Form
- Administrative Stipends



D. Monitoring Implementation

Question #1: What is the Charter Holder’s ongoing process to monitor the implementation of the strategies learned in professional development sessions?

Answer

Write answer here. Suggested word count is 400 words.

The Charter Holder monitors the implementation of strategies learned in professional development trainings by multi-levels of support and monitoring. Staff members are given a Strategy Checklist at the beginning of every professional development. This form allows teacher to document ideas, resources and strategies from specific professional developments. On this form teachers are also able to conduct a short reflection of the implementation of the strategies, resources and ideas in their classroom. As a result, teachers are able to self-monitor and make immediate adjustments in their classroom. A staff survey is also conducted at the end of every professional development to determine staffs comfort level in implementing new methodologies and strategies. Result are the shared with staff of the following staff meeting. If there is a large need for additional training, a follow-up session will be schedule for all instructional staff or utilizing the Mentor Teacher Program. Once a majority of staff members feel comfortable with implementing the instruction, administration will follow-up with Classroom Walkthroughs to determine the quality of implementation in the classroom along with providing feedback to individual instructional staff. Site principals and assistant principals continue to monitor the implementation of newly adopted instructional strategies by conducting informal observations throughout the year.

Documentation

Provide a bulleted list of documents that serve as evidence of implementation of this process:

- Classroom Strategy Checklist
- Sample Staff Survey and Results
- Classroom Walkthroughs
- Informal observations

Question #2: How does the Charter Holder follow-up with instructional staff regarding implementation of the strategies learned in professional development?

Answer



Demonstration of Sufficient Progress Report

Write answer here. Suggested word count is 400 words.

The Charter Holder follows up with instructional staff multi-levels of support and feedback. A staff survey is also conducted at the end of every professional development to determine staffs comfort level in implementing new methodologies and strategies. Results are then shared with staff at the following staff meeting. If there is a large need for additional training, a follow-up session will be schedule for all instructional staff or utilizing the Mentor Teacher Program. Once a majority of staff members feel comfortable with implementing the instruction, administration will follow-up with Classroom Walkthroughs to determine the quality of implementation in the classroom along with providing feedback to individual instructional staff. Site principals and assistant principals continue to monitor the implementation of newly adopted instructional strategies by conducting informal observations throughout the year. Individuals who require additional resources and training based on informal observations will meet with administration to create a plan of action. Action plans created with administration, may include a Teacher Improvement Plan, Teacher Mentor Assignment, and/or Required Online PD.

Documentation

Provide a bulleted list of documents that serve as evidence of implementation of this process:

- Sample Staff Survey and Results
- Classroom Walkthroughs
- Informal observations
- Teacher Improvement Plans
- Certificate of Completion (Online PD)



AREA VI: GRADUATION RATE (if applicable)

Answer the questions for each of the following two sections. Provide documentation that will clearly demonstrate implementation of the processes.

A. Monitoring Progress Toward Timely Graduation

Question #1: What is the Charter Holder’s ongoing process to create academic and career plans?

Answer

Write answer here. Suggested word count is 400 words.

Documentation

Provide a bulleted list of documents that serve as evidence of implementation of this process:

Question #2: What is the Charter Holder’s ongoing process to monitor and follow-up on student progress toward completing goals in academic and career plans? What criteria guide that process?

Answer

Write answer here. Suggested word count is 400 words.

Documentation

Provide a bulleted list of documents that serve as evidence of implementation of this process:

B. Addressing Barriers to Timely Graduation



Demonstration of Sufficient Progress Report

Question #1: What is the Charter Holder’s ongoing process to provide timely supports to remediate academic and social problems for students struggling to meet graduation requirements on time?

Answer

Write answer here. Suggested word count is 400 words.

Documentation

Provide a bulleted list of documents that serve as evidence of implementation of this process:

Question #2: What is the Charter Holder’s ongoing process to evaluate the processes described above to determine effectiveness? What criteria guide that process?

Answer

Write answer here. Suggested word count is 400 words.

Documentation

Provide a bulleted list of documents that serve as evidence of implementation of this process:



AREA VII: ACADEMIC PERSISTENCE (if applicable)

Answer the questions for the following section. Provide documentation that will clearly demonstrate implementation of the processes.

A. Strategies for Continuous Enrollment

Question #1: What is the Charter Holder’s ongoing process to measure levels of **engagement**? What criteria guide that process?

Answer

Write answer here. Suggested word count is 400 words.

Documentation

Provide a bulleted list of documents that serve as evidence of implementation of this process:

Question #2: What is the Charter Holder’s ongoing process to provide timely intervention for students demonstrating potential for **disengagement**?

Answer

Write answer here. Suggested word count is 400 words.

Documentation

Provide a bulleted list of documents that serve as evidence of implementation of this process:

Question #3: What is the Charter Holder’s ongoing process to evaluate these strategies to determine effectiveness? What criteria guide that process?



Demonstration of Sufficient Progress Report

Answer

Write answer here. Suggested word count is 400 words.

Documentation

Provide a bulleted list of documents that serve as evidence of implementation of this process:



APPENDIX F

FINANCIAL RESPONSE EVALUATION

Financial Performance Response Evaluation Instrument

Charter Holder Name: Heritage Elementary School
Charter Holder Entity ID: 81076

Required for: Renewal
Audit Year: 2015

Arizona State Board for Charter Schools (Board) staff completed the Financial Performance Response Evaluation Instrument for the Board in its consideration of applicable requests made by the charter holder. "Not Acceptable" answers may adversely affect the Board's decision regarding a charter holder's request.

Measure	Reason(s) for "Not Acceptable" Rating
1a. Going Concern Acceptable <input type="checkbox"/> Not Acceptable <input type="checkbox"/> Not Applicable <input checked="" type="checkbox"/>	
1b. Unrestricted Days Liquidity Acceptable <input checked="" type="checkbox"/> Not Acceptable <input type="checkbox"/> Not Applicable <input type="checkbox"/>	
1c. Default Acceptable <input type="checkbox"/> Not Acceptable <input type="checkbox"/> Not Applicable <input checked="" type="checkbox"/>	
2a. Net Income Acceptable <input checked="" type="checkbox"/> Not Acceptable <input type="checkbox"/> Not Applicable <input type="checkbox"/>	



Measure	Reason(s) for "Not Acceptable" Rating
2b. Cash Flow Acceptable <input type="checkbox"/> Not Acceptable <input type="checkbox"/> Not Applicable <input checked="" type="checkbox"/>	
2c. Fixed Charge Coverage Ratio Acceptable <input checked="" type="checkbox"/> Not Acceptable <input type="checkbox"/> Not Applicable <input type="checkbox"/>	



APPENDIX G

SUPPLEMENTED FINANCIAL RESPONSE

Financial Performance Framework Response

Heritage Elementary School, Inc.

Amended: 5/16/2016

Near-Term Indicators – Charter Holder

1b. Unrestricted Days Liquidity

Condition

The Statement of Financial Position included in the Audited Financials for fiscal year 2015¹ indicated an Unrestricted Days Liquidity measure of 20.38. The school did not have adequate unrestricted cash on hand at the close of the fiscal year to cover at least 30 days of operating expenses.

Cause

The school maintained a Cash balance of \$534,070 as of 6/30/2015¹, of which \$213,825 was Classroom Site Funds (“CSF”) carryover from prior and current periods, and was restricted². The following factors contributed to the Charter Holder’s cash position of less than 30 days Unrestricted Cash on Hand as of 6/30/2015.

Decrease in Net Assets

In each fiscal year from 2009 through 2015 the Charter Holder recorded a decrease in Net Assets³ (as more fully described under “Net Income” below) as a result of operating activities, requiring the Charter Holder to borrow funds from a related party⁴.

FY	Revenue	Expenses	Net Income
2009	5,949,034	6,850,065	-901,031
2010	7,948,850	8,125,251	-176,401
2011	8,165,694	8,410,719	-245,025
2012	6,571,327	7,396,826	-825,499
2013	6,125,028	7,350,251	-1,225,223
2014	5,749,045	6,629,307	-880,262
2015	5,162,586	5,736,058	-573,472

Year after year decreases in Net Assets as described above had direct and cumulative affect on the Charter Holder’s cash position as of 6/30/2015. The decrease in Net Assets reduced/eliminated any Cash that would have otherwise been generated from operating activities, which in turn made securing third party/outside short term financing impossible.

As described above, borrowed funds were available to the Charter Holder from a related party to bolster monthly cash flow deficits and to ensure continuity of operations. However, the Charter Holder did not have access to borrowed funds sufficient to increase the Unrestricted Days Cash on Hand measure to a minimum of 30 as of the close of the 2015 fiscal year.

Deficient Performance Incentive Plan In Previous Years

The entirety of the restricted funds balance maintained by the School is comprised of CSF, designated for teacher performance incentive pay⁵.

In fiscal years 2009, 2010, 2011, 2013 and 2014, the Charter Holder utilized a performance incentive plan that consequently limited the payout of CSF performance pay, resulting in carryover of CSF monies received⁶.

FY	CSF Opening Balance	CSF Received	CSF Payout	CSF Closing Balance	Total Cash	% Restricted
2009	124,751	254,434	201,455	177,730	280,460	63.37%
2010	177,730	237,572	169,317	245,985	464,626	52.94%
2011	245,985	239,025	176,443	308,567	550,746	56.03%
2012	308,567	193,549	238,347	263,769	394,759	66.82%
2013	263,769	199,501	149,467	313,803	327,672	95.77%
2014	313,803	267,328	210,354	370,777	409,541	90.53%
2015	370,777	244,472	401,424	213,825	534,070	40.04%

¹ Source: Statement of Financial Position, Heritage Elementary School Audited Financials FY 2015

² Source: AFR, Heritage Elementary School, FY 2015, page 4

³ Source: Statement of Activities, Heritage Elementary School Audited Financials, FY 2009, FY 2010, FY 2011, FY 2012, FY 2013, FY 2014, FY 2015

⁴ Source: Statement of Financial Position, Heritage Elementary School Audited Financials FY 2015, page 24, Notes Payable to Related Party (cumulative amount).

⁵ Source: AFR, Heritage Elementary School, FY 2015, page 4, and Audited Financial Report, Heritage Elementary School, FY 2015.

⁶ Source: AFR, Heritage Elementary School, FY 2009, FY 2010, FY 2011, FY 2012, FY 2013, FY 2014, FY 2015 page 4 of each

The Charter Holder's Unrestricted Cash on Hand fell to its lowest point at the close of FY 2013. The Charter Holder's Unrestricted Cash on Hand increased slightly (as a percentage of Total Cash on Hand) in FY 2014, and showed significant improvement in FY 2015, although still below the minimum requirement of 30 days.

Action Taken

Continuation of Funds Borrowed from Related Party in 2016

Based on deficient monthly cash flow in FY 2015, the Charter Holder found it necessary to continue borrowing funds from a related party in order to supplement monthly cash flows as a result of operations⁷. This resource will continue to be available to the Charter Holder as needed in FY 2016⁸. The Charter Holder will rely on funds borrowed from a related party to supplement cash flows in FY 2016¹², however to a lesser degree than in previous periods.

Reduction of Restricted Cash Balance in FY 2015

The Charter Holder implemented a new teacher performance compensation plan beginning in FY 2015 that offered significant performance pay increases to teachers based on improved teacher and student performance. This resulted in a reduction of the Restricted Cash balance in the amount of \$156,952⁹. When combined with the increase in cash of \$124,529 reported by the Charter Holder in FY 2015¹⁰, this increased the Charter Holder's Liquidity measure from 2.13 in FY 2014, to 20.38 in FY 2015, an increase of 18.25 days¹¹.

The Charter Holder's Performance Incentive Plan, beginning in fiscal year 2015 and for each fiscal year thereafter, incorporates a greater emphasis on teacher performance by tying a larger portion of each teacher's compensation to performance criteria. In this manner, a larger share of each teacher's gross compensation is available to be paid from restricted CSF monies (than under the previous plan), based on the achievement each teacher's performance goals. As a larger portion of each teacher's compensation is performance based (not guaranteed), proportionately more of each teacher's compensation may be paid from CSF Performance Pay than in years past. This strategy will result in either lower overall teacher compensation based on failure to achieve performance objectives, or an annual decrease in total Restricted Cash based on the achievement of performance pay objectives without increasing overall teacher compensation significantly.

Continued Reduction of Restricted Cash Balance in FY 2016

Based on the success realized from the implementation of the new teacher performance compensation plan in FY 2015, a similar plan was implemented for FY 2016. The results of this plan are expected to reduce the Restricted Cash balance by an additional approximately \$115,000¹².

FY	Opening Balance	CSF Received	Payout	Closing Balance	Total Cash	% Restricted
2016	213,825	296,580	411,580	98,825	765,558	12.91%

When combined with the increase in cash of \$181,488 projected by the Charter Holder in FY 2016¹² as a result of activities (as more fully described under Net Income below), this will increase the Charter Holder's Liquidity measure from 20.38 in FY 2015, to 39.14 in FY 2016, an increase of 18.67 days¹².

Focus on Improved Net Income in FY 2015

Although still deficient, the Charter Holder reported improved Net Income in FY 2015 (as more fully described under "2a. Net Income" below).

Focus on Continued Improved Net Income in FY 2016

Although still likely to be deficient, the Charter Holder projects further improved Net Income in FY 2016 (as more fully described under "2a. Net Income" below).

⁷ Source: Statement of Financial Position, Heritage Elementary School Audited Financials FY 2015
⁸ Source: Note 1, Heritage Elementary School Audited Financials FY 2015
⁹ Source: AFR, Heritage Elementary School, FY 2014 and FY 2015 page 4 of each
¹⁰ Source: Statement of Cash Flows, Heritage Elementary School Audited Financials, FY 2015
¹¹ Source: ASBCS Charter Holder Financial Performance Dashboard, FY 2014 and FY 2015
¹² Source: Statement of Cash Flows, Heritage Elementary School - Historic and Projected, FY 2016 (attached)
Financial Performance Framework Response – Heritage Elementary School

Result

Improved Unrestricted Days Liquidity in FY 2015

Though still below the minimum of 30 Days, Unrestricted Days Liquidity grew in FY 2015 to 20.38¹¹ due to the actions described above, as well as improved Net Income (as more fully described under “2a. Net Income” below).

Improved Unrestricted Days Liquidity in FY 2016

At the close of FY 2016 Unrestricted Days Liquidity is projected to be 39.14¹² due to the actions described above, as well as improved Net Income (as more fully described under “2a. Net Income” below). This will result in a score of “Meets” based on the Financial Performance Framework criteria for this category.

Sustainability Indicators – Charter Holder

2a. Net Income

Condition

The Charter Holder recorded Net Income for FY 2015 in the amount of (\$573,472)¹³.

Cause

Decreased Enrollment

One of the primary contributing factors to the Charter Holder’s deficient Net Income in FY 2015 was reduced enrollment. Reduced enrollment each year from FY 2012 to FY 2015 significantly impacted the Charter Holder’s revenue from both State and Federal sources.

Historic Enrollment Data

Grade	2011	2012	2013	2014	2015
Total Students	1,164	829	834	798	758
Total ADM	1,065	763	768	745	714
Student Growth		-302	5	-23	-30

Decreased Revenue

In FY 2011 the Charter Holder had an ADM of 1,065 students¹⁴.

In FY 2012 the Charter Holder had an ADM of 763 students¹⁵. The decrease of 302 ADM from the prior year resulted in a reduction of funding between FY 2011 and FY 2012 in the amount of (\$1,127,566)¹⁶.

In FY 2013 the Charter Holder had an ADM of 768 students¹⁷. Despite the nominal increase in ADM over the previous year, revenue was further reduced by (\$446,299)¹⁸ between FY 2012 and FY 2013.

In FY 2014 the Charter Holder had an ADM of 745 students¹⁹. The decrease of 23 ADM from the prior year resulted in a reduction of funding between FY 2013 and FY 2014 in the amount of (\$432,957)²⁰.

In FY 2015 the Charter Holder had an ADM of 715 students²¹. The decrease of 30 ADM from the prior year resulted in a reduction of funding between FY 2014 and FY 2015 in the amount of (\$375,983)²².

Reduced and declining enrollment each year from FY 2012 to FY 2015 made it necessary for the Charter Holder to significantly reduce expenses.

¹³ Source: Statement of Activities, Heritage Elementary School Audited Financials, FY 2015

¹⁴ Source: CHAR 55, FY 2011 – Heritage Elementary School

¹⁵ Source: CHAR 55, FY 2012 – Heritage Elementary School

¹⁶ Source: Statement of Activities, Heritage Elementary School Audited Financial Statements, FY 2012

¹⁷ Source: CHAR 55, FY 2013 – Heritage Elementary School

¹⁸ Source: Statement of Activities, Heritage Elementary School Audited Financial Statements, FY 2013

¹⁹ Source: CHAR 55, FY 2014 – Heritage Elementary School

²⁰ Source: Statement of Activities, Heritage Elementary School Audited Financial Statements, FY 2014

²¹ Source: CHAR 55, FY 2015 – Heritage Elementary School

²² Source: Statement of Activities, Heritage Elementary School Audited Financial Statements, FY 2015

Insufficient and Delayed Reduction of Expenses

In response to declining enrollment, the Charter Holder should have acted with more urgency to reduce expenses.

Personnel related expenses, the Charter Holder's largest category of expense, were not adjusted on par with the reduction of enrollment (as more fully described below).

Additionally, the Charter Holder's high Fixed Costs (as more fully described below under "Fixed Costs") related to the operation of their Glendale campus made it difficult to reduce expenses sufficient to compensate for the reduction in revenue resulting from the reduced enrollment described above. This, combined with the Personnel related expenses described above, lead to significantly increased Per Pupil Expenditures and a reduction of Per Pupil Net Income from FY 2012 through FY 2014.

Per Pupil Net Income

As illustrated below²³, the Charter Holder did not significantly respond to the year after year decrease in enrollment until FY 2015, the first year in the preceding four years in which Per Pupil Expenditures were brought (reduced) closest to FY 2011 levels.

Per Pupil Net Income					
	2011	2012	2013	2014	2015
Revenue	8,165,684	6,571,327	6,125,028	5,749,045	5,162,586
Expenses	8,410,709	7,396,826	7,350,251	6,629,307	5,736,058
Per Pupil Revenue	7,667	8,612	7,973	7,720	7,227
Per Pupil Expenditures	7,897	9,694	9,568	8,902	8,030
Per Pupil Net Income	-230	-1,082	-1,595	-1,182	-803

Although Per Pupil Expenditures decreased in FY 2015, so did Per Pupil Revenue. The resulting Per Pupil Net Income in FY 2015, though improved from the previous year, was still below zero.

Personnel Related Expenses

As mentioned above, personnel related expenses were not adjusted on par with the declining enrollment in fiscal years 2012, 2013, and 2014²⁴.

Per Pupil Personnel Expenditures					
	2011	2012	2013	2014	2015
Revenue	8,165,684	6,571,327	6,125,028	5,749,045	5,162,586
Expenses	8,410,709	7,396,826	7,350,251	6,629,307	5,736,058
Personnel Expenses	3,988,007	3,025,173	3,186,512	2,944,310	2,561,636
Per Pupil Personnel Expenditures	3,745	3,965	4,148	3,954	3,586
Personnel Expense % of Revenue	48.84%	46.04%	52.02%	51.21%	49.62%

Per Pupil Personnel Expenditures decreased in FY 2015²³ to below the Per Pupil Expenditure level of 2011.

Fixed Costs

To pay for the purchase and construction of their Glendale facilities, the Charter Holder has a Bond Payable to the Pima County Industrial Development Authority (Pima IDA), (collateralized by all land and buildings of the Schools), and is obligated under a loan agreement to make payments sufficient to pay the principal and interest on its loan and to maintain the required amount in a debt service reserve.

The Fixed Costs related to the Glendale facilities made it difficult to reduce expenses sufficient to compensate for the reduction in revenue. The Charter Holder's current Fixed Cost structure requires a minimum ADM of 814 students in order to record a Net Operating Income of \$1.00 or more.

²³ Source: Statement of Activities, Heritage Elementary School audited Financials, for the reference year, and Historic Statement of Activities for the reference year (attached)

²⁴ Source: Statement of Activities, Heritage Elementary School audited Financials, for the reference year, and Historic Statement of Activities for the reference year (attached)

Per Pupil Fixed Cost Expenditures

	2011	2012	2013	2014	2015
Revenue	8,165,684	6,571,327	6,125,028	5,749,045	5,162,586
Expenses	8,410,709	7,396,826	7,350,251	6,629,307	5,736,058
Fixed Costs	1,889,000	1,593,000	1,770,000	1,757,000	1,202,083
Per Pupil Fixed Cost Expenditures	1,774	2,088	2,304	2,359	1,683
Fixed Cost % of Revenue	23.13%	24.24%	28.90%	30.56%	23.28%

Action Taken

Focus on Increased Student Enrollment in FY 2016

Gaining new student enrollment is a primary focus of the Charter Holder.

The School achieved the Letter Grade of B in the 2014 academic year. Shortly after the start of the 2015 school year this information was released to the public. Immediately thereafter, the Charter Holder began to emphasize the improved academic performance of the school in all marketing efforts.

Based on working relationships established with local Pre-K schools in the Glendale area in the 2015 school year, the Glendale campus was able to increase kindergarten enrollment for the 2016 school year by 26 students²⁵. This increase in kindergarten enrollment will have a positive, continued and lasting impact on the enrollment of the Glendale campus in subsequent years as these students (and their siblings) move up through each grade level.

Further Reduction of Per Pupil Expenditures in FY 2016

The Charter Holder conducted a comprehensive review of all expenses incurred by the School (as described under “New Budget Process” below). Based on the findings of this review, budgeted expenses for fiscal year 2016 are projected to be approximately \$91.00 per pupil lower overall than in fiscal year 2015²⁶.

Continued Focus on Increased Student Enrollment in FY 2017

Gaining new student enrollment will continue to be a primary focus of the Charter Holder in 2017. As more fully described above, the increased kindergarten enrollment at the Glendale campus is expected to continue in 2017. Increased kindergarten enrollment is an integral assumption in the total projected enrollment for 2017 included in the Projected Statement of Activities for 2017.

Preliminary pre-enrollment counts as of the date of this report indicate an 96-student increase²⁷ in enrollment (at both the Glendale and Williams campuses combined) when compared to the same time in the preceding year. Although this does not necessarily guarantee increased enrollment in 2017 (over 2016), it is a very strong indicator of increased enrollment for the 2017 school year. The Charter Holder’s enrollment projections are further supported by anecdotal evidence such as the significant increase year-to-date in prospective parent tours for incoming students, which are up nearly 30% at the Glendale campus over the preceding year.

In past years, both the Glendale and Williams campuses enroll a significant portion of their “new” students over the summer break, up to and through the first two weeks of the school year. This holds particularly true for kindergarten enrollment, wherein summer enrollment can account for more than 20% of total kindergarten enrollment.

Implementation of New Budget Process

The Charter Holder adopted significantly more effective budget creation and management processes during the later part of FY 2014. This change was necessary in order to provide a more accurate predictor of financial outcomes, and to ensure a more timely response to changes in anticipated student enrollment and subsequent revenue.

As part of this change, when developing the budget for a given year, spending data for the previous two fiscal years is assembled, analyzed and reported in a manner that provides more insight into spending trends. A per pupil expenditure model is created in order to better understand expenses that are driven by student enrollment and attendance.

²⁵ Source: ADMS 45-1 Heritage Elementary School, Kinder enrollment - Glendale Campus, 2014-2015 & 2015-2016

²⁶ Source: Historic Statement of Activities, FY 2015 and Projected Statement of Activities, FY 2016 (attached)

²⁷ Source: Pre-Enrollment figures taken from “Percentage of Returning Students by Teacher” worksheet – attached.
Financial Performance Framework Response – Heritage Elementary School

For initial planning of future years, student enrollment growth models are developed based on realistic market indicators and compared to historic student enrollment. Similar to the per pupil expenditure model, a revenue model is developed to gain insight into revenues at the Local, State, and Federal level, and yield an accurate per pupil funding level for use in future budget projections.

This data is then distilled into an accurate Budget Projection, which is supported by the data analysis described above. The goal of the improved budget process is to ensure improved Net Income each year, ultimately resulting in positive Net Income in FY 2017²⁸.

Increased Administrative Oversight

Budgeted revenue and spending, as compared to actual activities, are reviewed on a monthly basis by School Administration. All adjustments to spending in response to anticipated underperformance in revenue or projected overspending are made on a weekly basis by School Administration. All unscheduled expenses (expenses not included in the Charter Holder’s operating budget at the beginning of the operating period) are first reviewed to establish whether or not budget capacity exists for the expenditure prior to authorization.

Upon review, should an unscheduled expense be deemed necessary, budget capacity will be re-allocated from an expense line where it is not needed to the expense line where the unscheduled expense will be booked, prior to encumbrance of the expense.

Increased Management Oversight

Management has also established additional contingency as part of each expense object grouping. This funding can be allocated as a last resort to cover unscheduled expenses occurring later in the fiscal year that are deemed necessary but cannot be paid for through re-allocation of budget capacity from other expense lines.

Management reviews Budget vs. Actual performance, Statement of Activities, and Statement of Cash Flows on a monthly basis, as well as the Unrestricted Days Liquidity and Fixed Charge Coverage Ratio measures and projections on a quarterly basis as part of their monthly Finance & Operations Meetings. As a result of oversight by Management, School Administration may be provided with additional direction and/or resources as it relates to the execution of the Charter Holder’s annual budget.

Increased Governance Oversight

The Board of Directors reviews Budget vs. Actual performance, Statement of Activities, and Statement of Cash Flows on a monthly basis, as well as the Unrestricted Days Liquidity and Fixed Charge Coverage Ratio measures and projections on a quarterly basis as part of their regular session meetings. As a result of oversight by the Board of Directors, Management may be provided with additional direction and/or resources as it relates to the execution of the Charter Holder’s annual budget.

Result

Increased Student Enrollment in FY 2016

Based on the success of the Charter Holder’s marketing and enrollment efforts, student enrollment in FY 2016 increased by 69 ADM²⁹.

Historic and Current Enrollment Data

Grade	2011	2012	2013	2014	2015	2016
Total Students	1,164	829	834	798	758	836
Total ADM	1,065	763	768	745	714	784
Student Growth		-302	5	-23	-30	69

Improved Per Pupil Expenditures and Per Pupil Net Income in FY 2016

In FY 2016 the Charter Holder is projected to record a Net Income of (\$142,554)³⁰. This will be achieved through increased student enrollment as described above, and the reduction of Per Pupil Expenditures as part of the implementation of the improved budget management processes more fully described above.

Per Pupil Personnel Expenditures	2014	2015	2016

²⁸ Source: Projected Statement of Activities, FY 2016 and FY 2017(attached)
²⁹ Source: CHAR 55, FY 2016 – Heritage Elementary School
³⁰ Source: Projected Statement of Activities, FY 2016 (attached)
Financial Performance Framework Response – Heritage Elementary School

Revenue	5,749,045	5,162,586	6,075,213
Expenses	6,629,307	5,736,058	6,217,767
Personnel Expenses	2,944,310	2,561,636	2,597,470
Per Pupil Personnel Expenditures	3,954	3,586	3,316
Personnel Expense % of Revenue	51.21%	49.62%	42.76%

Per Pupil Fixed Cost Expenditures

	2014	2015	2016
Revenue	5,749,045	5,162,586	6,075,213
Expenses	6,629,307	5,736,058	6,217,767
Fixed Costs	1,757,000	1,202,083	1,227,070
Per Pupil Fixed Cost Expenditures	2,359	1,683	1,567
Fixed Cost % of Revenue	30.56%	23.28%	20.20%

Per Pupil Net Income

	2014	2015	2016
Revenue	5,749,045	5,162,586	6,075,213
Expenses	6,629,307	5,736,058	6,217,767
Per Pupil Revenue	7,720	7,227	7,757
Per Pupil Expenditures	8,902	8,030	7,939
Per Pupil Net Income	-1,182	-803	-182

Positive Net Income in FY 2017

Based on projected enrollment, revenues, and expenditures, the Charter Holder will record positive Net Income in the amount of \$65,299 in FY 2017³¹. This will result in a score of "Meets" based on the Financial Performance Framework criteria for this category.

2b. Fixed Charge Coverage Ratio

Condition

The Charter Holder recorded a Fixed Charge Coverage Ratio of .74 in FY 2015.

Cause

The Net Income deficit recorded in FY 2015 resulted in the Fixed Charge Coverage Ratio deficit. The Net Income deficit was the result of conditions and circumstances more fully described under "2a. Net Income" above.

Action Taken

As more fully described under "1b. Unrestricted Days Liquidity" above, the Charter Holder has access to sufficient cash to augment cash flow to cover fixed charges for the foreseeable future³².

The Charter Holder will rely on borrowed funds from a related party (as needed) to cover the Fixed Charge Coverage Ratio deficit for the remainder of FY 2016.

Result

Positive Coverage Ratio in FY 2016

Though still projected to record a small Net Income deficit, the Charter Holder's Fixed Charge Coverage Ratio for FY 2016 is projected to be 1.13³³ due to the reduction of expenses more fully described under "2a. Net Income" above. This will result in a score of "Meets" based on the Financial Performance Framework criteria for this category.

³¹ Source: Projected Statement of Activities, FY 2017 (attached)

³² Source: Note 1: Heritage Elementary School Audited Financials FY 2015, Statement of Financial Position, Note 6: Audited Financials (Consolidated Entity) FY 2015

³³ Source: Projected Statement of Activities, FY 2016 (attached)

Heritage Elementary School
Statement of Cash Flows - Historic & Projected
FY 2014 through FY 2020

	Actual 745 Jul '13 - Jun 14	Actual 714 Jul '14 - Jun 15	Projected 783 Jul '15 - Jun 16
Student ADM			
Cash flows from operating activities			
Change in unrestricted net assets:	(\$880,262)	(\$573,472)	(\$142,554)
Adjustments to reconcile change in net asset deficit to net cash used in operations:			
<i>Depreciation expense</i>	512,363	512,363	552,000
<i>Amortization expense</i>	125,267	73,140	73,140
Changes in operating assets and liabilities:			
<i>Decrease in accounts receivable</i>	122,552	60,983	106,557
<i>Decrease in accounts payable and accrued expenses</i>	-54,534	-124,315	-49,194
<i>Decrease in accrued payroll and related expenses</i>	-39,029	-11,329	-190,567
Net cash from operating activities	-213,643	-62,631	349,382
Cash flows from investing activities			
<i>Increase in Bond Funds</i>	574,601	0	0
<i>Increase in fixed assets</i>	-36,125	-3,050	-45,750
Net cash from investing activities	538,476	-3,050	-45,750
Cash flows from financing activities			
Increase in note payable to related party	520,227	496,906	252,856
Payment of principal	-763,191	-306,696	-325,000
Net cash from financing activities	-242,964	190,210	-72,144
Net change in cash	81,869	124,529	231,488
Cash at beginning of the year	327,672	409,541	534,070
Cash at end of the year	\$409,541	\$534,070	\$765,558
<i>Balance of Restricted Cash</i>	370,777	213,825	98,825
Unrestricted Cash Balance	\$38,764	\$320,245	\$666,733
<i>Annual Expenses</i>	6,629,307	5,736,058	6,217,767
<i>Daily Expenses</i>	18,162.48	15,715.23	17,034.98
Measure of Unrestricted Liquidity	2.13	20.38	39.14

Heritage Elementary School
Statement of Cash Flows - Historic & Projected
FY 2014 through FY 2020

	Projected Student ADM 825	Projected 850	Projected 875	Projected 900
	Jul '16 - Jun 17	Jul '17 - Jun 18	Jul '18 - Jun 19	Jul '19 - Jun 20
Cash flows from operating activities				
Change in unrestricted net assets:	\$65,299	\$221,708	\$345,991	\$470,290
Adjustments to reconcile change in net asset deficit to net cash used in operations:				
<i>Depreciation expense</i>	552,000	552,000	552,000	552,000
<i>Amortization expense</i>	73,140	73,140	73,140	73,140
Changes in operating assets and liabilities:				
<i>Decrease in accounts receivable</i>	0	0	0	0
<i>Decrease in accounts payable and accrued expenses</i>	0	0	0	0
<i>Decrease in accrued payroll and related expenses</i>	0	0	0	0
Net cash from operating activities	690,439	846,848	971,131	1,095,430
Cash flows from investing activities				
<i>Increase in Bond Funds</i>	0	0	0	0
<i>Increase in fixed assets</i>	-50,000	-50,000	-50,000	-50,000
Net cash from investing activities	-50,000	-50,000	-50,000	-50,000
Cash flows from financing activities				
Increase in note payable to related party	-150,000	-250,000	-350,000	-450,000
Payment of principal	-345,000	-365,000	-385,000	-410,000
Net cash from financing activities	-495,000	-615,000	-735,000	-860,000
Net change in cash	145,439	181,848	186,131	185,430
Cash at beginning of the year	765,558	910,998	1,092,846	1,278,977
Cash at end of the year	\$910,998	\$1,092,846	\$1,278,977	\$1,464,407
<i>Balance of Restricted Cash</i>	57,500	37,500	25,000	12,500
Unrestricted Cash Balance	\$853,498	\$1,055,346	\$1,253,977	\$1,451,907
<i>Annual Expenses</i>	6,371,990	6,432,940	6,505,290	6,577,625
<i>Daily Expenses</i>	17,457.51	17,624.49	17,822.71	18,020.89
Measure of Unrestricted Liquidity	48.89	59.88	70.36	80.57

Heritage Elementary School
Historic Statement of Activities
 July 2010 through June 2015

	Actual 1,065 Jul '10 - Jun 11	Actual 763 Jul '11 - Jun 12	Actual 768 Jul '12 - Jun 13	Actual 745 Jul '13 - Jun 14	Actual 714 Jul '14 - Jun 15
Student ADM					
Ordinary Income/Expense					
Income					
1000 - Revenue from local sources	699,259	528,539	501,798	542,966	143,885
3000 - Revenue from State Sources	5,980,407	4,852,841	4,594,061	4,586,349	4,491,234
4000 - Rev from Federal Sources	1,486,018	1,189,947	1,029,169	619,730	527,468
Total Income	8,165,684	6,571,327	6,125,028	5,749,045	5,162,586
Gross Profit	8,165,684	6,571,327	6,125,028	5,749,045	5,162,586
Expense					
6100 - Personal Services	3,539,448	2,659,749	2,799,036	2,568,685	2,221,908
6200 - Benefits	448,559	365,424	387,476	375,624	339,728
6300 - Professional Services	801,266	614,040	616,784	610,249	604,581
6400 - Property Services	328,781	161,163	139,287	270,607	280,608
6500 - Other Purchased Services	298,623	179,267	286,462	265,219	266,744
6600 - Supplies	760,835	935,297	982,291	466,881	468,402
6800 - Other Expenses	1,544,117	1,892,319	1,513,776	1,434,411	968,584
Total Expense	7,721,629	6,807,259	6,725,111	5,991,677	5,150,555
Net Ordinary Income	444,055	-235,932	-600,083	-242,632	12,031
Other Income/Expense					
Other Expense					
Amortization Expense (Bond)	73,140	73,139	73,140	73,140	73,140
Depreciation Expense	615,940	516,428	552,000	564,490	512,363
Total Other Expense	689,080	589,567	625,140	637,630	585,503
Net Other Income	-689,080	-589,567	-625,140	-637,630	-585,503
Net Income	-245,025	-825,499	-1,225,223	-880,262	-573,472

Coverage Ratios

Fiscal Year ending June 30	2011	2012	2013	2014	2015
Net Income	-\$245,025	-\$825,499	-\$1,225,223	-\$880,262	-\$573,472
Add Back Non Cash Activity	\$689,080	\$589,567	\$625,140	\$637,630	\$585,503
Add Back Interest Payments (2007 Bonds)	\$1,554,000	\$1,557,000	\$1,390,000	\$1,352,000	\$895,385
Net Income Available for Bond Payments	\$1,998,055	\$1,321,068	\$789,917	\$1,109,368	\$907,416
Annual Debt Service Payments	\$1,889,000	\$1,593,000	\$1,770,000	\$1,757,000	\$1,202,083
Debt Service Coverage Ratio 2016 Bonds	1.06	0.83	0.45	0.63	0.75

Heritage Elementary School
Projected Statement of Activities
 July 2015 through June 2020

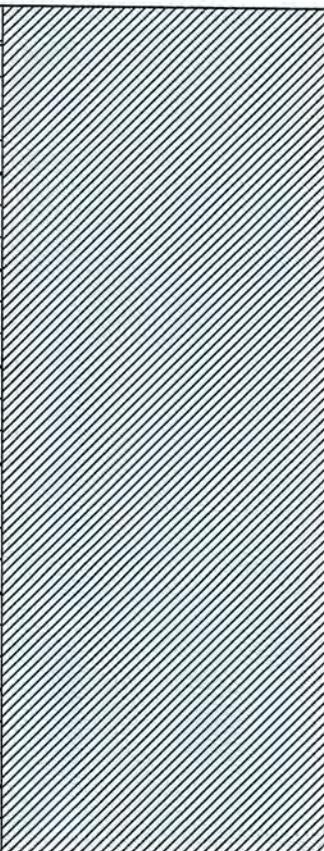
	Projected Student ADM 783 Jul '15 - Jun 16	Projected 825 Jul '16 - Jun 17	Projected 850 Jul '17 - Jun 18	Projected 875 Jul '18 - Jun 19	Projected 900 Jul '19 - Jun 20
Ordinary Income/Expense					
Income					
1000 - Revenue from local sources	170,525	179,621	185,064	190,507	195,950
3000 - Revenue from State Sources	5,022,233	5,290,118	5,450,425	5,610,731	5,771,038
4000 - Rev from Federal Sources	882,454	967,550	1,019,159	1,050,042	1,080,926
Total Income	6,075,213	6,437,289	6,654,648	6,851,281	7,047,914
Gross Profit	6,075,213	6,437,289	6,654,648	6,851,281	7,047,914
Expense					
6100 - Personal Services	2,266,531	2,375,000	2,405,000	2,445,000	2,485,000
6200 - Benefits	330,939	332,100	336,300	341,900	347,500
6300 - Professional Services	603,831	604,000	604,000	604,000	604,000
6400 - Property Services	302,452	301,150	301,150	301,150	301,150
6500 - Other Purchased Services	281,940	281,950	281,950	281,950	281,950
6600 - Supplies	837,514	882,150	908,900	935,650	962,385
6800 - Other Expenses	969,421	970,500	970,500	970,500	970,500
Total Expense	5,592,627	5,746,850	5,807,800	5,880,150	5,952,485
Net Ordinary Income	482,586	690,439	846,848	971,131	1,095,429
Other Income/Expense					
Other Expense					
Amortization Expense (Bond)	73,140	73,140	73,140	73,140	73,140
Depreciation Expense	552,000	552,000	552,000	552,000	552,000
Total Other Expense	625,140	625,140	625,140	625,140	625,140
Net Other Income	-625,140	-625,140	-625,140	-625,140	-625,140
Net Income	-142,554	65,299	221,708	345,991	470,290

Coverage Ratios

Fiscal Year ending June 30	2016	2017	2018	2019	2020
Net Income	-\$142,554	\$65,299	\$221,708	\$345,991	\$470,290
Add Back Non Cash Activity	\$625,140	\$625,140	\$625,140	\$625,140	\$625,140
Add Back Interest Payments (2007 Bonds)	\$902,070	\$882,070	\$862,070	\$842,070	\$817,070
Net Income Available for Bond Payments	\$1,384,656	\$1,572,509	\$1,708,918	\$1,813,201	\$1,912,499
Annual Debt Service Payments	\$1,227,070	\$1,227,070	\$1,227,070	\$1,227,070	\$1,227,070
Debt Service Coverage Ratio 2016 Bonds	1.13	1.28	1.39	1.48	1.56

Heritage Elementary School
Percentage of Returning Students by Teacher

↕ Grade & Teacher / Date ⇨	3/4	3/16	3/22	3/30	4/8	4/18	4/28	5/11	5/13	
K-Ashley	63%	67%	83%	83%	88%	88%	92%	92%	92%	
K-Gable	79%	88%	96%	96%	96%	96%	96%	96%	96%	
K-Warren	80%	80%	84%	84%	84%	84%	84%	84%	84%	
K-Young	50%	75%	83%	83%	83%	83%	88%	88%	88%	
1-Schursky	83%	93%	93%	96%	96%	96%	96%	93%	93%	
1-Walker-Wong	68%	71%	86%	93%	93%	93%	93%	93%	93%	
1-Waters	50%	86%	89%	89%	89%	89%	89%	96%	96%	
2-Shrader	77%	83%	87%	90%	90%	90%	90%	90%	90%	
2-Tolmachoff	52%	83%	93%	93%	93%	93%	93%	93%	93%	
2-Williams	48%	72%	90%	90%	93%	93%	97%	97%	97%	
3-Love	69%	72%	79%	79%	79%	79%	79%	79%	79%	
3-McCurdy	90%	94%	94%	94%	94%	94%	94%	97%	97%	
3-Morris	70%	77%	87%	90%	90%	90%	90%	90%	90%	
4-Jessup	64%	72%	80%	84%	96%	96%	96%	96%	96%	
4-Pierce	80%	80%	80%	80%	80%	80%	80%	80%	80%	
4-Shippy	71%	82%	93%	93%	83%	83%	96%	93%	93%	
4-Suess	75%	79%	84%	88%	88%	88%	88%	92%	88%	
5-Hermosillo	75%	84%	88%	90%	90%	90%	97%	97%	97%	
5-Skousen	90%	97%	97%	100%	100%	100%	100%	100%	100%	
5-Thwaits	83%	87%	93%	93%	93%	93%	93%	93%	93%	
6-Campbell	79%	83%	89%	93%	93%	93%	93%	93%	93%	
6-Poureetezadi	54%	68%	86%	86%	86%	86%	86%	86%	86%	
6-Reid	65%	73%	85%	85%	85%	85%	88%	88%	88%	
7-Cox	62%	72%	83%	83%	83%	83%	83%	83%	83%	
7-Hurley	53%	63%	80%	83%	87%	87%	87%	83%	83%	



2016-2017 Enrollment Commitments (new AND returning students combined)

↕ Grade / Date ⇨	3/4	3/16	3/22	3/30	4/8	4/18	4/28	5/11	5/13				
K	6	13	20	26	50	54	59	61	63				
1	54	74	81	81	82	82	84	86	86				
2	57	79	85	87	88	91	92	94	94				
3	50	63	71	72	75	77	79	80	81				
4	67	76	81	83	83	83	84	87	87				
5	74	82	89	91	94	94	94	96	95				
6	74	92	95	95	95	96	97	98	99				
7	53	61	68	69	69	70	72	73	73				
8	35	41	47	49	49	50	50	50	50				
TOTAL =	470	581	637	653	685	697	711	725	728	0	0	0	0

Heritage Elementary School
Percentage of Returning Students by Teacher

↕ Grade & Teacher / Date ⇨	3/19	3/25	4/2	4/9	4/16	4/23	4/30	5/7	5/14	5/21	
K-Bildner	61%	78%	78%	78%	79%	79%	83%	83%	88%	88%	
K-Harbilas	96%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
K-Warren	83%	96%	96%	96%	96%	96%	96%	96%	96%	96%	
1-Foley	67%	78%	78%	78%	78%	78%	78%	78%	85%	85%	
1-Mandel	57%	75%	82%	82%	82%	82%	82%	82%	82%	82%	
1-Medina	89%	93%	93%	93%	93%	93%	93%	93%	96%	96%	
2-Ortiz	82%	93%	93%	93%	93%	93%	93%	93%	93%	93%	
2-Shrader	92%	92%	92%	92%	92%	92%	92%	92%	96%	96%	
2-Williams	76%	86%	93%	93%	93%	93%	93%	93%	93%	93%	
3-Graham	39%	82%	82%	82%	82%	82%	86%	86%	89%	93%	
3-McCurdy	77%	87%	90%	90%	93%	93%	93%	93%	93%	93%	
3-Morris	69%	86%	86%	86%	86%	86%	86%	86%	86%	86%	
4-Hermosillo	90%	93%	93%	93%	93%	93%	97%	100%	100%	100%	
4-Kneisel	73%	93%	93%	93%	93%	93%	93%	93%	93%	93%	
4-Wenker	60%	80%	83%	83%	83%	83%	83%	83%	83%	83%	
5-O'Loughlin	64%	79%	86%	86%	86%	86%	86%	86%	86%	89%	
5-Smith	86%	89%	93%	93%	93%	93%	93%	93%	93%	93%	
5-Thwaites	81%	96%	96%	96%	96%	96%	96%	96%	96%	96%	
6-Campbell	83%	90%	90%	90%	90%	90%	90%	90%	97%	97%	
6-Williams	62%	79%	79%	79%	79%	79%	79%	79%	79%	79%	
7-Cox	69%	79%	79%	79%	79%	79%	79%	83%	86%	90%	
7-Hurley	79%	93%	93%	93%	93%	93%	93%	93%	93%	93%	

2015-2016 Enrollment Commitments (new AND returning students combined)

↕ Grade / Date ⇨	3/19	3/25	4/2	4/9	4/16	4/23	4/30	5/7	5/14	5/21	5/28	6/2	6/9
K	25	39	46	47	52	54	56	58	59	64	65	68	71
1	58	68	68	68	69	70	72	73	75	75	77	78	77
2	55	64	66	66	67	67	68	70	71	72	72	73	74
3	68	75	79	80	80	81	82	82	83	82	83	83	83
4	54	75	77	78	79	79	80	81	81	81	81	82	85
5	68	81	82	82	82	83	86	87	87	87	88	88	89
6	64	73	76	76	77	77	77	77	77	78	78	79	80
7	47	55	56	57	57	57	57	58	58	59	59	59	60
8	42	49	50	51	51	51	51	52	53	53	53	54	56
TOTAL =	481	579	600	605	614	619	629	638	644	651	656	664	675

CAMPUS NAME: Heritage Williams

	pre-enrolled 2015-2016	pre-enrolled for 2016/2017
Date:	5/14/15	5/13/16
K	4	6
1st grade	15	8
2nd grade	15	15
3rd grade	10	17
4th grade	8	11
5th grade	6	10
6th grade	5	10
7th grade	7	4
8th grade	6	7
TOTAL	76	88

Financial Performance Framework Response

Heritage Elementary School, Inc.

4/11/2016

Near-Term Indicators – Charter Holder

1b. Unrestricted Days Liquidity

Condition

The Statement of Financial Position included in the Audited Financials for fiscal year 2015¹ indicated an Unrestricted Days Liquidity measure of 0.74. The school did not have adequate unrestricted cash on hand at the close of the fiscal year to cover at least 30 days of operating expenses.

Cause

The school maintained a Cash balance of \$534,070 as of 6/30/2013¹, of which \$213,825 was Classroom Site Funds (“CSF”) carryover from prior and current periods, and was restricted². The following factors contributed to the Charter Holder’s cash position of less than 30 days Unrestricted Cash on Hand as of 6/30/2015.

Decrease in Net Assets

In each fiscal year from 2009 through 2015 the Charter Holder recorded a decrease in Net Assets³ (as more fully described under “Net Income” below) as a result of operating activities, requiring the Charter Holder to borrow funds from a related party⁴.

FY	Revenue	Expenses	Net Income
2009	5,949,034	6,850,065	-901,031
2010	7,948,850	8,125,251	-176,401
2011	8,165,694	8,410,719	-245,025
2012	6,571,327	7,396,826	-825,499
2013	6,125,028	7,350,251	-1,225,223
2014	5,749,045	6,629,307	-880,262
2015	5,162,586	5,736,058	-573,472



As described above, borrowed funds were available to the Charter Holder to bolster monthly cash flow deficits and to ensure continuity of operations. However, the Charter Holder did not have access to borrowed funds sufficient to increase the Unrestricted Days Cash on Hand measure to a minimum of 30 as of the close of the 2015 fiscal year.

Deficient Performance Incentive Plan In Previous Years

The entirety of the restricted funds balance maintained by the School is comprised of CSF, designated for teacher performance incentive pay⁵.

In fiscal years 2009, 2010, 2011, 2013 and 2014, the Charter Holder utilized a performance incentive plan that consequently limited the payout of CSF performance pay, resulting in carryover of CSF monies received⁶.

FY	CSF Opening Balance	CSF Received	CSF Payout	CSF Closing Balance	Total Cash	% Restricted
2009	124,751	254,434	201,455	177,730	280,460	63.37%
2010	177,730	237,572	169,317	245,985	464,626	52.94%
2011	245,985	239,025	176,443	308,567	550,746	56.03%
2012	308,567	193,549	238,347	263,769	394,759	66.82%
2013	263,769	199,501	149,467	313,803	327,672	95.77%
2014	313,803	267,328	210,354	370,777	409,541	90.53%
2015	370,777	244,472	401,424	213,825	534,070	40.04%



The Charter Holder’s Unrestricted Cash on Hand fell to its lowest point at the close of FY 2013. The Charter Holder’s Unrestricted Cash on Hand increased slightly (as a percentage of Total Cash on Hand) in FY 2014, and showed significant improvement in FY 2015, although still below the minimum requirement of 30 days.

¹ Source: Statement of Financial Position, Heritage Elementary School Audited Financials FY 2015

² Source: AFR, Heritage Elementary School, FY 2015, page 4

³ Source: Statement of Activities, Heritage Elementary School Audited Financials, FY 2009, FY 2010, FY 2011, FY 2012, FY 2013, FY 2014, FY 2015

⁴ Source: Statement of Financial Position, Heritage Elementary School Audited Financials FY 2015, page 24, Notes Payable to Related Party (cumulative amount).

⁵ Source: AFR, Heritage Elementary School, FY 2015, page 4, and Audited Financial Report, Heritage Elementary School, FY 2015.

⁶ Source: AFR, Heritage Elementary School, FY 2009, FY 2010, FY 2011, FY 2012, FY 2013, FY 2014, FY 2015 page 4 of each

Financial Performance Framework Response – Heritage Elementary School

Action Taken

Continuation of Funds Borrowed from Related Party in 2016

Based on deficient monthly cash flow in FY 2015, the Charter Holder found it necessary to continue borrowing funds from a related party in order to supplement monthly cash flows as a result of operations⁷. This resource will continue to be available to the Charter Holder as needed in FY 2016⁸. The Charter Holder will rely on funds borrowed from a related party to supplement cash flows in FY 2016¹², however to a lesser degree than in previous periods.

Reduction of Restricted Cash Balance in FY 2015

The Charter Holder implemented a new teacher performance compensation plan beginning in FY 2015 that offered significant performance pay increases to teachers based on improved student performance. This resulted in a reduction of the Restricted Cash balance in the amount of \$156,952⁹. When combined with the increase in cash of \$124,529 reported by the Charter Holder in FY 2015¹⁰, this increased the Charter Holder's Liquidity measure from 2.13 in FY 2014, to 20.38 in FY 2015, an increase of 18.25 days¹¹.

Continued Reduction of Restricted Cash Balance in FY 2016

Based on the success realized from the implementation of the new teacher performance compensation plan in FY 2015, a similar plan was implemented for FY 2016. The results of this plan are expected to reduce the Restricted Cash balance by an additional approximately \$115,000¹².

FY	Opening Balance	CSF Received	Payout	Closing Balance	Total Cash	% Restricted
2016	213,825	296,580	411,580	98,825	765,558	12.91%

When combined with the increase in cash of \$181,488 projected by the Charter Holder in FY 2016¹² as a result of activities (as more fully described under Net Income below), this will increase the Charter Holder's Liquidity measure from 20.38 in FY 2015, to 39.14 in FY 2016, an increase of 18.67 days¹².

Focus on Improved Net Income in FY 2015

Although still deficient, the Charter Holder reported improved Net Income in FY 2015 (as more fully described under "2a. Net Income" below).

Focus on Continued Improved Net Income in FY 2016

Although still likely to be deficient, the Charter Holder projects further improved Net Income in FY 2016 (as more fully described under "2a. Net Income" below).

Result

Improved Unrestricted Days Liquidity in FY 2015

Though still below the minimum of 30 Days, Unrestricted Days Liquidity grew in FY 2015 to 20.38¹¹ due to the actions described above, as well as improved Net Income (as more fully described under "2a. Net Income" below).

Improved Unrestricted Days Liquidity in FY 2016

At the close of FY 2016 Unrestricted Days Liquidity is projected to be 39.14¹² due to the actions described above, as well as improved Net Income (as more fully described under "2a. Net Income" below). This will result in a score of "Meets" based on the Financial Performance Framework criteria for this category.

⁷ Source: Statement of Financial Position, Heritage Elementary School Audited Financials FY 2015

⁸ Source: Note 1, Heritage Elementary School Audited Financials FY 2015

⁹ Source: AFR, Heritage Elementary School, FY 2014 and FY 2015 page 4 of each

¹⁰ Source: Statement of Cash Flows, Heritage Elementary School Audited Financials, FY 2015

¹¹ Source: ASBCS Charter Holder Financial Performance Dashboard, FY 2014 and FY 2015

¹² Source: Statement of Cash Flows, Heritage Elementary School - Historic and Projected, FY 2016 (attached)

Sustainability Indicators – Charter Holder

2a. Net Income

Condition

The Charter Holder recorded Net Income for FY 2015 in the amount of (\$573,472)¹³.

Cause

Decreased Enrollment

One of the primary contributing factors to the Charter Holder's deficient Net Income in FY 2015 was reduced enrollment. Reduced enrollment each year from FY 2012 to FY 2015 significantly impacted the Charter Holder's revenue from both State and Federal sources.

Historic Enrollment Data

Grade	2011	2012	2013	2014	2015
Total Students	1,164	829	834	798	758
Total ADM	1,065	763	768	745	714
Student Growth		-302	5	-23	-30

Decreased Revenue

In FY 2011 the Charter Holder had an ADM of 1,065 students¹⁴.

In FY 2012 the Charter Holder had an ADM of 763 students¹⁵. The decrease of 302 ADM from the prior year resulted in a reduction of funding between FY 2011 and FY 2012 in the amount of (\$1,127,566)¹⁶.

In FY 2013 the Charter Holder had an ADM of 768 students¹⁷. Despite the nominal increase in ADM over the previous year, revenue was further reduced by (\$446,299)¹⁸ between FY 2012 and FY 2013.

In FY 2014 the Charter Holder had an ADM of 745 students¹⁹. The decrease of 23 ADM from the prior year resulted in a reduction of funding between FY 2013 and FY 2014 in the amount of (\$432,957)²⁰.

In FY 2015 the Charter Holder had an ADM of 715 students²¹. The decrease of 30 ADM from the prior year resulted in a reduction of funding between FY 2014 and FY 2015 in the amount of (\$375,983)²².

Reduced and declining enrollment each year from FY 2012 to FY 2015 made it necessary for the Charter Holder to significantly reduce expenses.

Insufficient and Delayed Reduction of Expenses

In response to declining enrollment, the Charter Holder should have acted with more urgency to reduce expenses.

Personnel related expenses, the Charter Holder's largest category of expense, were not adjusted on par with the reduction of enrollment (as more fully described below).

Additionally, the Charter Holder's high Fixed Costs (as more fully described below under "Fixed Costs") related to the operation of their Glendale campus made it difficult to reduce expenses sufficient to compensate for the reduction in revenue resulting from the reduced enrollment described above. This, combined with the Personnel related expenses described above, lead to significantly increased Per Pupil Expenditures and a reduction of Per Pupil Net Income from FY 2012 through FY 2014.

¹³ Source: Statement of Activities, Heritage Elementary School Audited Financials, FY 2015

¹⁴ Source: CHAR 55, FY 2011 – Heritage Elementary School

¹⁵ Source: CHAR 55, FY 2012 – Heritage Elementary School

¹⁶ Source: Statement of Activities, Heritage Elementary School Audited Financial Statements, FY 2012

¹⁷ Source: CHAR 55, FY 2013 – Heritage Elementary School

¹⁸ Source: Statement of Activities, Heritage Elementary School Audited Financial Statements, FY 2013

¹⁹ Source: CHAR 55, FY 2014 – Heritage Elementary School

²⁰ Source: Statement of Activities, Heritage Elementary School Audited Financial Statements, FY 2014

²¹ Source: CHAR 55, FY 2015 – Heritage Elementary School

²² Source: Statement of Activities, Heritage Elementary School Audited Financial Statements, FY 2015

Financial Performance Framework Response – Heritage Elementary School

Per Pupil Net Income

As illustrated below²³, the Charter Holder did not significantly respond to the year after year decrease in enrollment until FY 2015, the first year in the preceding four years in which Per Pupil Expenditures were brought (reduced) closest to FY 2011 levels.

Per Pupil Net Income					
	2011	2012	2013	2014	2015
Revenue	8,165,684	6,571,327	6,125,028	5,749,045	5,162,586
Expenses	8,410,709	7,396,826	7,350,251	6,629,307	5,736,058
Per Pupil Revenue	7,667	8,612	7,973	7,720	7,227
Per Pupil Expenditures	7,897	9,694	9,568	8,902	8,030
Per Pupil Net Income	-230	-1,082	-1,595	-1,182	-803

Although Per Pupil Expenditures decreased in FY 2015, so did Per Pupil Revenue. The resulting Per Pupil Net Income in FY 2015, though improved from the previous year, was still below zero.

Personnel Related Expenses

As mentioned above, personnel related expenses were not adjusted on par with the declining enrollment in fiscal years 2012, 2013, and 2014²⁴.

Per Pupil Personnel Expenditures					
	2011	2012	2013	2014	2015
Revenue	8,165,684	6,571,327	6,125,028	5,749,045	5,162,586
Expenses	8,410,709	7,396,826	7,350,251	6,629,307	5,736,058
Personnel Expenses	3,988,007	3,025,173	3,186,512	2,944,310	2,561,636
Per Pupil Personnel Expenditures	3,745	3,965	4,148	3,954	3,586
Personnel Expense % of Revenue	48.84%	46.04%	52.02%	51.21%	49.62%

Per Pupil Personnel Expenditures decreased in FY 2015²³ to below the Per Pupil Expenditure level of 2011.

Fixed Costs

To pay for the purchase and construction of their Glendale facilities, the Charter Holder has a Bond Payable to the Pima County Industrial Development Authority (Pima IDA), (collateralized by all land and buildings of the Schools), and is obligated under a loan agreement to make payments sufficient to pay the principal and interest on its loan and to maintain the required amount in a debt service reserve.

The Fixed Costs related to the Glendale facilities made it difficult to reduce expenses sufficient to compensate for the reduction in revenue. The Charter Holder's current Fixed Cost structure requires a minimum ADM of 814 students in order to record a Net Operating Income of \$1.00 or more.

Per Pupil Fixed Cost Expenditures					
	2011	2012	2013	2014	2015
Revenue	8,165,684	6,571,327	6,125,028	5,749,045	5,162,586
Expenses	8,410,709	7,396,826	7,350,251	6,629,307	5,736,058
Fixed Costs	1,889,000	1,593,000	1,770,000	1,757,000	1,202,083
Per Pupil Fixed Cost Expenditures	1,774	2,088	2,304	2,359	1,683
Fixed Cost % of Revenue	23.13%	24.24%	28.90%	30.56%	23.28%

²³ Source: Statement of Activities, Heritage Elementary School audited Financials, for the reference year, and Historic Statement of Activities for the reference year (attached)

²⁴ Source: Statement of Activities, Heritage Elementary School audited Financials, for the reference year, and Historic Statement of Activities for the reference year (attached)

Action Taken

Focus on Increased Student Enrollment in FY 2016

Gaining new student enrollment is a primary focus of the Charter Holder.

The School achieved the Letter Grade of B in the 2014 academic year. Shortly after the start of the 2015 school year this information was released to the public. Immediately thereafter, the Charter Holder began to emphasize the improved academic performance of the school in all marketing efforts.

Further Reduction of Per Pupil Expenditures in FY 2016

The Charter Holder conducted a comprehensive review of all expenses incurred by the School (as described under "New Budget Process" below). Based on the findings of this review, budgeted expenses for fiscal year 2016 are projected to be approximately \$91.00 per pupil lower overall than in fiscal year 2015²⁵.

Implementation of New Budget Process

The Charter Holder adopted significantly more effective budget creation and management processes during the later part of FY 2014. This change was necessary in order to provide a more accurate predictor of financial outcomes, and to ensure a more timely response to changes in anticipated student enrollment and subsequent revenue.

As part of this change, when developing the budget for a given year, spending data for the previous two fiscal years is assembled, analyzed and reported in a manner that provides more insight into spending trends. A per pupil expenditure model is created in order to better understand expenses that are driven by student enrollment and attendance.

For initial planning of future years, student enrollment growth models are developed based on realistic market indicators and compared to historic student enrollment. Similar to the per pupil expenditure model, a revenue model is developed to gain insight into revenues at the Local, State, and Federal level, and yield an accurate per pupil funding level for use in future budget projections.

This data is then distilled into an accurate Budget Projection, which is supported by the data analysis described above. The goal of the improved budget process is to ensure improved Net Income each year, ultimately resulting in positive Net Income in FY 2017²⁶.

Increased Administrative Oversight

Budgeted revenue and spending, as compared to actual activities, are reviewed on a monthly basis by School Administration. All adjustments to spending in response to anticipated underperformance in revenue or projected overspending are made on a weekly basis by School Administration. All unscheduled expenses (expenses not included in the Charter Holder's operating budget at the beginning of the operating period) are first reviewed to establish whether or not budget capacity exists for the expenditure prior to authorization.

Upon review, should an unscheduled expense be deemed necessary, budget capacity will be re-allocated from an expense line where it is not needed to the expense line where the unscheduled expense will be booked, prior to encumbrance of the expense.

Increased Management Oversight

Management has also established additional contingency as part of each expense object grouping. This funding can be allocated as a last resort to cover unscheduled expenses occurring later in the fiscal year that are deemed necessary but cannot be paid for through re-allocation of budget capacity from other expense lines.

Management reviews Budget vs. Actual performance, Statement of Activities, and Statement of Cash Flows on a monthly basis, as well as the Unrestricted Days Liquidity and Fixed Charge Coverage Ratio measures and projections on a quarterly basis as part of their monthly Finance & Operations Meetings. As a result of oversight by Management, School Administration may be provided with additional direction and/or resources as it relates to the execution of the Charter Holder's annual budget.

²⁵ Source: Historic Statement of Activities, FY 2015 and Projected Statement of Activities, FY 2016 (attached)

²⁶ Source: Projected Statement of Activities, FY 2016 and FY 2017(attached)

Increased Governance Oversight

The Board of Directors reviews Budget vs. Actual performance, Statement of Activities, and Statement of Cash Flows on a monthly basis, as well as the Unrestricted Days Liquidity and Fixed Charge Coverage Ratio measures and projections on a quarterly basis as part of their regular session meetings. As a result of oversight by the Board of Directors, Management may be provided with additional direction and/or resources as it relates to the execution of the Charter Holder's annual budget.

Result

Increased Student Enrollment in FY 2016

Based on the success of the Charter Holder's marketing and enrollment efforts, student enrollment in FY 2016 increased by 69 ADM²⁷.

Historic and Current Enrollment Data

Grade	2011	2012	2013	2014	2015	2016
Total Students	1,164	829	834	798	758	836
Total ADM	1,065	763	768	745	714	784
Student Growth		-302	5	-23	-30	69

Improved Per Pupil Expenditures and Per Pupil Net Income in FY 2016

In FY 2016 the Charter Holder is projected to record a Net Income of (\$142,554)²⁸. This will be achieved through increased student enrollment as described above, and the reduction of Per Pupil Expenditures as part of the implementation of the improved budget management processes more fully described above.

Per Pupil Personnel Expenditures

	2014	2015	2016
Revenue	5,749,045	5,162,586	6,075,213
Expenses	6,629,307	5,736,058	6,217,767
Personnel Expenses	2,944,310	2,561,636	2,597,470
Per Pupil Personnel Expenditures	3,954	3,586	3,316
Personnel Expense % of Revenue	51.21%	49.62%	42.76%

Per Pupil Fixed Cost Expenditures

	2014	2015	2016
Revenue	5,749,045	5,162,586	6,075,213
Expenses	6,629,307	5,736,058	6,217,767
Fixed Costs	1,757,000	1,202,083	1,227,070
Per Pupil Fixed Cost Expenditures	2,359	1,683	1,567
Fixed Cost % of Revenue	30.56%	23.28%	20.20%

Per Pupil Net Income

	2014	2015	2016
Revenue	5,749,045	5,162,586	6,075,213
Expenses	6,629,307	5,736,058	6,217,767
Per Pupil Revenue	7,720	7,227	7,757
Per Pupil Expenditures	8,902	8,030	7,939
Per Pupil Net Income	-1,182	-803	-182

Positive Net Income in FY 2017

Based on projected enrollment, revenues, and expenditures, the Charter Holder will record positive Net Income in the amount of \$65,299 in FY 2017²⁹. This will result in a score of "Meets" based on the Financial Performance Framework criteria for this category.

²⁷ Source: CHAR 55, FY 2016 – Heritage Elementary School

²⁸ Source: Projected Statement of Activities, FY 2016 (attached)

²⁹ Source: Projected Statement of Activities, FY 2017 (attached)

2b. Fixed Charge Coverage Ratio

Condition

The Charter Holder recorded a Fixed Charge Coverage Ratio of .74 in FY 2015.

Cause

The Net Income deficit recorded in FY 2015 resulted in the Fixed Charge Coverage Ratio deficit. The Net Income deficit was the result of conditions and circumstances more fully described under "2a. Net Income" above.

Action Taken

As more fully described under "1b. Unrestricted Days Liquidity" above, the Charter Holder has access to sufficient cash to augment cash flow to cover fixed charges for the foreseeable future³⁰.

The Charter Holder will rely on borrowed funds from a related party (as needed) to cover the Fixed Charge Coverage Ratio deficit for the remainder of FY 2016.

Result

Positive Coverage Ratio in FY 2016

Though still projected to record a small Net Income deficit, the Charter Holder's Fixed Charge Coverage Ratio for FY 2016 is projected to be 1.13³¹ due to the reduction of expenses more fully described under "2a. Net Income" above. This will result in a score of "Meets" based on the Financial Performance Framework criteria for this category.

³⁰ Source: Note 1: Heritage Elementary School Audited Financials FY 2015, Statement of Financial Position, Note 6: Audited Financials (Consolidated Entity) FY 2015

³¹ Source: Projected Statement of Activities, FY 2016 (attached)
Financial Performance Framework Response – Heritage Elementary School

Heritage Elementary School
Statement of Cash Flows - Historic & Projected
FY 2014 through FY 2020

	Actual 745	Actual 714	Projected 783
Student ADM	Jul '13 - Jun 14	Jul '14 - Jun 15	Jul '15 - Jun 16
Cash flows from operating activities			
Change in unrestricted net assets:	(\$880,262)	(\$573,472)	(\$142,554)
Adjustments to reconcile change in net asset deficit to net cash used in operations:			
<i>Depreciation expense</i>	512,363	512,363	552,000
<i>Amortization expense</i>	125,267	73,140	73,140
Changes in operating assets and liabilities:			
<i>Decrease in accounts receivable</i>	122,552	60,983	106,557
<i>Decrease in accounts payable and accrued expenses</i>	-54,534	-124,315	-49,194
<i>Decrease in accrued payroll and related expenses</i>	-39,029	-11,329	-190,567
Net cash from operating activities	-213,643	-62,631	349,382
Cash flows from investing activities			
<i>Increase in Bond Funds</i>	574,601	0	0
<i>Increase in fixed assets</i>	-36,125	-3,050	-45,750
Net cash from investing activities	538,476	-3,050	-45,750
Cash flows from financing activities			
Increase in note payable to related party	520,227	496,906	252,856
Payment of principal	-763,191	-306,696	-325,000
Net cash from financing activities	-242,964	190,210	-72,144
Net change in cash	81,869	124,529	231,488
Cash at beginning of the year	327,672	409,541	534,070
Cash at end of the year	\$409,541	\$534,070	\$765,558
<i>Balance of Restricted Cash</i>	370,777	213,825	98,825
Unrestricted Cash Balance	\$38,764	\$320,245	\$666,733
<i>Annual Expenses</i>	6,629,307	5,736,058	6,217,767
<i>Daily Expenses</i>	18,162.48	15,715.23	17,034.98
Measure of Unrestricted Liquidity	2.13	20.38	39.14

Heritage Elementary School
Statement of Cash Flows - Historic & Projected
FY 2014 through FY 2020

	Projected Student ADM 825	Projected 850	Projected 875	Projected 900
	Jul '16 - Jun 17	Jul '17 - Jun 18	Jul '18 - Jun 19	Jul '19 - Jun 20
Cash flows from operating activities				
Change in unrestricted net assets:	\$65,299	\$221,708	\$345,991	\$470,290
Adjustments to reconcile change in net asset deficit to net cash used in operations:				
<i>Depreciation expense</i>	552,000	552,000	552,000	552,000
<i>Amortization expense</i>	73,140	73,140	73,140	73,140
Changes in operating assets and liabilities:				
<i>Decrease in accounts receivable</i>	0	0	0	0
<i>Decrease in accounts payable and accrued expenses</i>	0	0	0	0
<i>Decrease in accrued payroll and related expenses</i>	0	0	0	0
Net cash from operating activities	690,439	846,848	971,131	1,095,430
Cash flows from investing activities				
<i>Increase in Bond Funds</i>	0	0	0	0
<i>Increase in fixed assets</i>	-50,000	-50,000	-50,000	-50,000
Net cash from investing activities	-50,000	-50,000	-50,000	-50,000
Cash flows from financing activities				
Increase in note payable to related party	-150,000	-250,000	-350,000	-450,000
Payment of principal	-345,000	-365,000	-385,000	-410,000
Net cash from financing activities	-495,000	-615,000	-735,000	-860,000
Net change in cash	145,439	181,848	186,131	185,430
Cash at beginning of the year	765,558	910,998	1,092,846	1,278,977
Cash at end of the year	\$910,998	\$1,092,846	\$1,278,977	\$1,464,407
<i>Balance of Restricted Cash</i>	57,500	37,500	25,000	12,500
Unrestricted Cash Balance	\$853,498	\$1,055,346	\$1,253,977	\$1,451,907
<i>Annual Expenses</i>	6,371,990	6,432,940	6,505,290	6,577,625
<i>Daily Expenses</i>	17,457.51	17,624.49	17,822.71	18,020.89
Measure of Unrestricted Liquidity	48.89	59.88	70.36	80.57

Heritage Elementary School
Historic Statement of Activities
 July 2010 through June 2015

	Actual 1,065 Jul '10 - Jun 11	Actual 763 Jul '11 - Jun 12	Actual 768 Jul '12 - Jun 13	Actual 745 Jul '13 - Jun 14	Actual 714 Jul '14 - Jun 15
Student ADM					
Ordinary Income/Expense					
Income					
1000 - Revenue from local sources	699,259	528,539	501,798	542,966	143,885
3000 - Revenue from State Sources	5,980,407	4,852,841	4,594,061	4,586,349	4,491,234
4000 - Rev from Federal Sources	1,486,018	1,189,947	1,029,169	619,730	527,468
Total Income	8,165,684	6,571,327	6,125,028	5,749,045	5,162,586
Gross Profit	8,165,684	6,571,327	6,125,028	5,749,045	5,162,586
Expense					
6100 - Personal Services	3,539,448	2,659,749	2,799,036	2,568,685	2,221,908
6200 - Benefits	448,559	365,424	387,476	375,624	339,728
6300 - Professional Services	801,266	614,040	616,784	610,249	604,581
6400 - Property Services	328,781	161,163	139,287	270,607	280,608
6500 - Other Purchased Services	298,623	179,267	286,462	265,219	266,744
6600 - Supplies	760,835	935,297	982,291	466,881	468,402
6800 - Other Expenses	1,544,117	1,892,319	1,513,776	1,434,411	968,584
Total Expense	7,721,629	6,807,259	6,725,111	5,991,677	5,150,555
Net Ordinary Income	444,055	-235,932	-600,083	-242,632	12,031
Other Income/Expense					
Other Expense					
Amortization Expense (Bond)	73,140	73,139	73,140	73,140	73,140
Depreciation Expense	615,940	516,428	552,000	564,490	512,363
Total Other Expense	689,080	589,567	625,140	637,630	585,503
Net Other Income	-689,080	-589,567	-625,140	-637,630	-585,503
Net Income	-245,025	-825,499	-1,225,223	-880,262	-573,472

Coverage Ratios

Fiscal Year ending June 30	2011	2012	2013	2014	2015
Net Income	-\$245,025	-\$825,499	-\$1,225,223	-\$880,262	-\$573,472
Add Back Non Cash Activity	\$689,080	\$589,567	\$625,140	\$637,630	\$585,503
Add Back Interest Payments (2007 Bonds)	\$1,554,000	\$1,557,000	\$1,390,000	\$1,352,000	\$895,385
Net Income Available for Bond Payments	\$1,998,055	\$1,321,068	\$789,917	\$1,109,368	\$907,416
Annual Debt Service Payments	\$1,889,000	\$1,593,000	\$1,770,000	\$1,757,000	\$1,202,083
Debt Service Coverage Ratio 2016 Bonds	1.06	0.83	0.45	0.63	0.75

Heritage Elementary School
Projected Statement of Activities
 July 2015 through June 2020

	Projected Student ADM 783 Jul '15 - Jun 16	Projected 825 Jul '16 - Jun 17	Projected 850 Jul '17 - Jun 18	Projected 875 Jul '18 - Jun 19	Projected 900 Jul '19 - Jun 20
Ordinary Income/Expense					
Income					
1000 - Revenue from local sources	170,525	179,621	185,064	190,507	195,950
3000 - Revenue from State Sources	5,022,233	5,290,118	5,450,425	5,610,731	5,771,038
4000 - Rev from Federal Sources	882,454	967,550	1,019,159	1,050,042	1,080,926
Total Income	6,075,213	6,437,289	6,654,648	6,851,281	7,047,914
Gross Profit	6,075,213	6,437,289	6,654,648	6,851,281	7,047,914
Expense					
6100 - Personal Services	2,266,531	2,375,000	2,405,000	2,445,000	2,485,000
6200 - Benefits	330,939	332,100	336,300	341,900	347,500
6300 - Professional Services	603,831	604,000	604,000	604,000	604,000
6400 - Property Services	302,452	301,150	301,150	301,150	301,150
6500 - Other Purchased Services	281,940	281,950	281,950	281,950	281,950
6600 - Supplies	837,514	882,150	908,900	935,650	962,385
6800 - Other Expenses	969,421	970,500	970,500	970,500	970,500
Total Expense	5,592,627	5,746,850	5,807,800	5,880,150	5,952,485
Net Ordinary Income	482,586	690,439	846,848	971,131	1,095,429
Other Income/Expense					
Other Expense					
Amortization Expense (Bond)	73,140	73,140	73,140	73,140	73,140
Depreciation Expense	552,000	552,000	552,000	552,000	552,000
Total Other Expense	625,140	625,140	625,140	625,140	625,140
Net Other Income	-625,140	-625,140	-625,140	-625,140	-625,140
Net Income	-142,554	65,299	221,708	345,991	470,290

Coverage Ratios

Fiscal Year ending June 30	2016	2017	2018	2019	2020
Net Income	-\$142,554	\$65,299	\$221,708	\$345,991	\$470,290
Add Back Non Cash Activity	\$625,140	\$625,140	\$625,140	\$625,140	\$625,140
Add Back Interest Payments (2007 Bonds)	\$902,070	\$882,070	\$862,070	\$842,070	\$817,070
Net Income Available for Bond Payments	\$1,384,656	\$1,572,509	\$1,708,918	\$1,813,201	\$1,912,499
Annual Debt Service Payments	\$1,227,070	\$1,227,070	\$1,227,070	\$1,227,070	\$1,227,070
Debt Service Coverage Ratio 2016 Bonds	1.13	1.28	1.39	1.48	1.56