

AGENDA ITEM EXECUTIVE SUMMARY: Grade Level Change to Charter with Enrollment Cap Amendment Request

Request

Heritage Academy Queen Creek, Inc. (“Charter Holder”) submitted an expansion request to increase the grade levels the Charter Holder is approved to serve, from grades 7-12 to grades 6-12, and to increase the enrollment cap from 650 to 750, beginning in FY 2020. This expansion request accounts for 3 years of projected student enrollment.

See Appendix A: Amendment Request Materials and Support Materials.

The Charter Holder operates a 7-12 school in the Queen Creek area. The school offers a Classical education model with a focus on college preparation. According to the Narrative, most elementary schools in Queen Creek offer grades K-5, therefore “a gap exists at the 6th grade level for parents wishing to send their students to Heritage Academy. Parents have requested that we offer a 6th grade option.” The Charter Holder plans to enroll approximately 50 students in the 6th grade program and hire new teachers for the core classes only. Teachers in the existing middle school program will provide instruction in classical languages, history, science, and electives.

Three Year Plan

	FY 2019	FY 2020	FY 2021	FY 2022
Grade Levels	7-12	6-12	6-12	6-12
Enrollment	574	670	690	710

Staff Recommendation

The Charter Holder has met the criteria to receive a staff recommendation for expansion.

Staff Recommendation Criteria	Analysis
In operation for three years.	The Charter Holder has been in operation for four years.
“Meets Operational Performance Expectations” based on the dashboards for the most recent two prior years and the current year.	The Charter Holder “Meets” the Board’s Operational Performance Expectations.
“Meets the Board’s Financial Performance Expectations” based on the most recent dashboard.	The Charter Holder “Meets” the Board’s Financial Performance Expectations.
ADM is within 85% of current enrollment cap.	According to ADE School Finance, the Charter Holder currently has an ADM of 554.725. The charter holder is currently operating at 85% of its current enrollment cap of 650.
Each school operated by the Charter Holder: Performs at or above the average performance of a majority of schools within a five-mile radius of the school’s location.	Heritage Academy Gateway performs at or above the average performance of nearby schools in both ELA and Math. Information regarding nearby schools is provided on pages 2 and 3.
Past enrollment trends indicate the charter will exceed its enrollment cap within the next three years.	ADM in FY 2017 was 414.694, FY 2018 was 484.989, and FY 2019 was 554.725 (as of January 9, 2019). The charter will likely exceed its enrollment cap in the next three years.

Profile

The Charter Holder was granted a new charter in 2014.

Governance

Corporate Board Members	School Governing Body Members	Type
Jared Taylor	Mark Anderson	Parents
Earl Taylor	Beth Cowles	School Staff
	Kathleen Lopez	School Staff
	Amanda Smith	School Staff
	Jared Taylor	Charter Organization

School Profile

School Name	Heritage Academy Gateway		
Date Open	August 2014		
Location	Queen Creek		
Grades Served	7-12		
FY 18 Letter Grade	B		
	FY 16	FY 17	FY 18
ELA AzMERIT (41%*)	52%	62%	68%
Math AzMERIT (41%*)	50%	55%	62%
Science AIMS (52%*)	75%	72%	61%

*FY 18 State Average Passing

Additional School Choices Serving Grades 6-12 within 5 Miles of Heritage Academy Gateway

Total Schools	FY 18 Letter Grade	Total Charter Schools	FY 18 State Assessment Data Greater than State Average			Subgroups within (±5%) of Charter Holder's Subgroup Data		
			ELA (>41%)	Math (>41%)	Science (>52%)	FRL (±5%)	ELL (±5%)	SPED (±5%)
22	A	8	22	22	21	*	*	15
11	B	4	11	11	11	*	*	8

*Because the percentage of FRL and ELL students is not available for the Charter Holder, comparison to nearby schools is not possible.

Comparison of Nearby Schools to Heritage Academy Gateway

Total Schools	FY 18 Letter Grade	Total Charter Schools	FY 18 State Assessment Data Greater than Heritage Academy Gateway		
			AzMERIT ELA (>68%)	AzMERIT Math (>62%)	AIMS Science (>61%)
22	A	8	7	13	18
11	B	4	1	3	10
Total Number of Schools Performing Better than Heritage Academy Gateway (Percentage of Total)					
33		12 (36%)	8 (24%)	16 (48%)	28 (85%)

Schools Associated with Heritage Academy Gateway

Charter Holder Name	Heritage Academy, Inc.			Heritage Academy Laveen, Inc.		
School Name	Heritage Academy			Heritage Academy Laveen		
Date Open	August 1995			August 2014		
Location	Mesa			Laveen		
Grades Served	7-12			7-12		
FY 2018 Letter Grade	A			B		
	FY 16	FY 17	FY 18	FY 16	FY 17	FY 18
ELA AzMERIT (41%*)	56%	51%	76%	38%	38%	47%
Math AzMERIT (41%*)	42%	36%	51%	22%	26%	36%
Science AIMS (52%*)	65%	66%	75%	40%	44%	58%

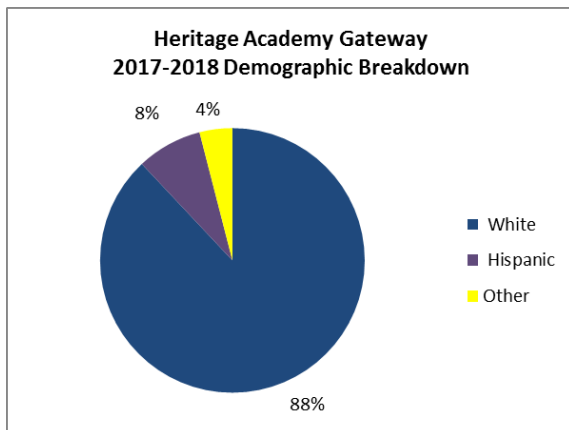
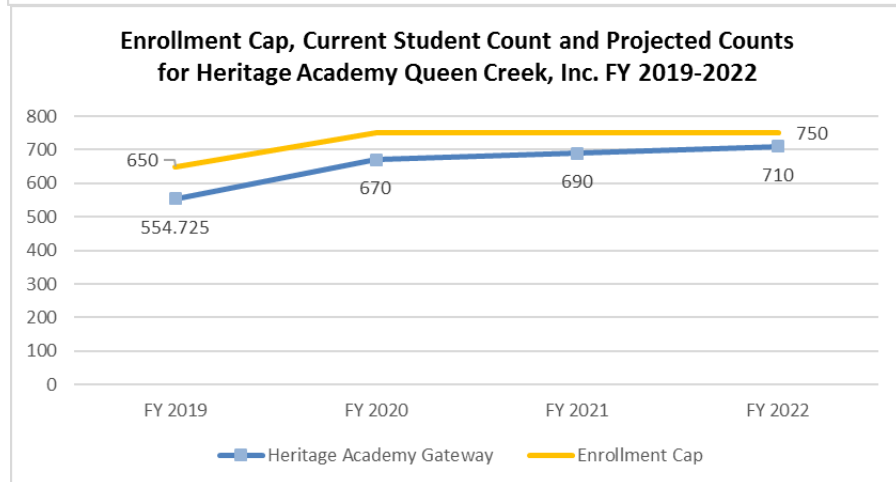
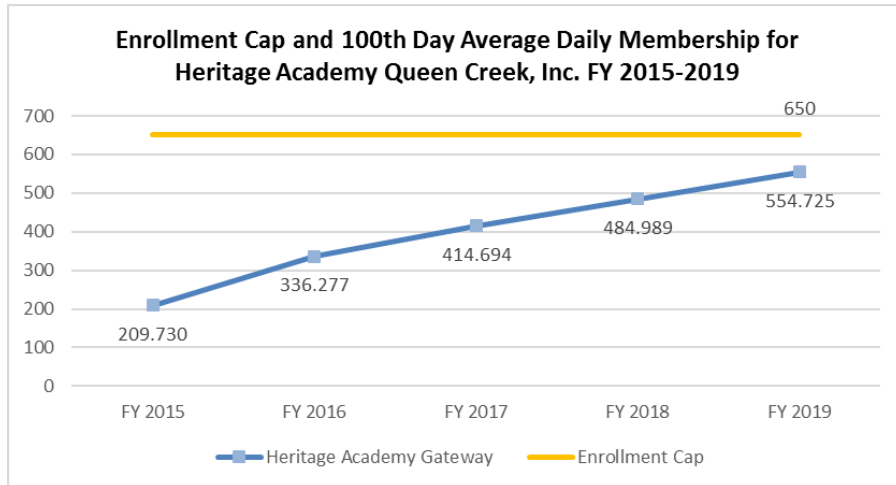
*FY 18 State Average Passing

*If the percentage of students is 0% or 100%, or the group includes less than 10 students, the percentage for that group is redacted.

At the December 10, 2018 Board meeting, the Board approved a new school, Heritage Academy Maricopa, which will operate under the Heritage Academy, Inc. charter and will open in FY 2020.

Enrollment and Demographic Data

100th Day Average Daily Membership for FY 2015–FY 2018, and FY 2019 ADM as of January 9, 2019.



2017-2018 Subgroup Data	
Free and Reduced Lunch	*
English Language Learners	*
Special Education	7%

**If the percentage of students is 0% or 100%, or the group includes less than 10 students, the percentage for that group is redacted.*

