

## PROPOSAL OVERVIEW AND ENROLLMENT PROJECTIONS

Please provide information for the applicant group's **designated representative**. This individual will serve as the contact for all communications, interviews, and notices from the ICSB regarding the submitted application.

**IMPORTANT NOTE:** *The full application, including this form, will be posted on the ICSB website. Applicants are advised that local community members, including members of the media, may contact the designated representative for questions about the proposed school(s).*

**Legal name of group applying for charter(s):** Rosa Parks: A Challenge Foundation Academy, Inc.

**Names, roles, and current employment for all persons on applicant team, including each board member:** Todd Relue, School Board Chair, Attorney Plews Shadley Racher & Braun LLP  
Keyon Whiteside, School Board Vice Chair, Senior Developer Willow Marketing  
Javier Barrera, Board Member, President and Founder BALAM  
Charlie Garcia, Board Member, President Kali Systems LLC  
Jeannette Bray, Board Member, Curriculum and Instruction Coordinator TeamCFA  
Anthony Helton, Chief Operating Officer TeamCFA  
Jack Rowe, Director of Leadership Development and School Support TeamCFA  
Tisha Crisler, Controller TeamCFA  
Jill Burleson, Director of Advancement TeamCFA  
Kristen Rodriguez, Data and Instructional Technology Coordinator, TeamCFA  
DeAnna Rowe, Regional Director TeamCFA

**Designated applicant representative:** DeAnna Rowe

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**Provide the requested information for each school included in this proposal.**  
 (You may add lines to the table if needed.)

Proposed School Name	Opening Year	School Model (e.g., college prep, dropout recovery)	Geographic Community *	School District(s) in Proposed Location	Grade Levels at Full Enrollment
Rosa Parks: A Challenge Foundation Academy	2017	Core Knowledge	Far Eastside Indianapolis	IPS	K-8

NOTE: \* Please indicate the city/town and, if known, potential address or neighborhood of location. Virtual operators should indicate the relevant geographies the operator intends to serve.

**Proposed Grade Levels and Student Enrollment**

Provide the following information for each charter school included in this proposal. Specify the planned year of opening for each, the grade levels served, and both the planned and maximum number of enrolled students by grade level for each year. (You may duplicate the table as needed.)

<b>Proposed School Name:</b>	Rosa Parks: A Challenge Foundation Academy	
<b>Academic Year</b>	<b>Grade Levels</b>	<b>Student Enrollment (Planned/Maximum)</b>
Year 1 (specify starting year)	K-2	300
Year 2	K-3	400
Year 3	K-4	500
Year 4	K-5	600
Year 5	K-6	700
At Capacity	K-8	900

**Do any of the proposed schools expect to contract or partner with an Education Service Provider (ESP) or other organization for school management/operation?\*** Yes  No

If yes, identify the ESP or other partner organization: TeamCFA Foundation will provide school design and development support.

**Will an application for the same charter school(s) be submitted to another authorizer in the near future?**

Yes  No

If yes, identify the authorizer(s): None

Planned submission date(s): N/A

**Please list the number of previous submissions for request to authorize this(ese) charter school(s) over the past five years, as required under IC § 20-24-3-4. Include the following information:**

Authorizer(s): None

Submission date(s): N/A

**Rosa Parks:  
A Challenge Foundation  
Academy**



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## Executive Summary

**Mission and Vision for Growth in Indiana.** TeamCFA Foundation (“TeamCFA”) is a charter school support organization that has established a national network (“Network”) of high quality, free, public charter schools bound by a common set of principles and goals. TeamCFA endeavors to support the development of academically rigorous, financially sustainable charter schools by employing proven academic, business and governance practices and leveraging the free market to provide quality academic seats in neighborhoods where they don’t currently exist or are extremely lacking. TeamCFA’s motto, “Together Each Achieves More,” is a belief that the success of each student takes the active participation, communication and commitment of teachers, students and parents working in collaboration. TeamCFA further believes that by fostering a continuous partnership among all the stakeholders, the “TEAM” can build a strong culture of expectation, achievement and results.

TeamCFA formed Rosa Parks: A Challenge Foundation Academy, Inc., a non-profit organization for the operation of Rosa Parks: A Challenge Foundation Academy (“RP:CFA”), a school for the Far Eastside of Indianapolis. The mission of RP:CFA is to provide a robust, challenging and supportive academic environment that is accessible to all students while encouraging and enhancing common values and ideals in a community setting.

The mission of RP:CFA aligns with TeamCFA’s ultimate goal to support schools in their missions to develop thoughtful, articulate youth who are prepared to become productive, accountable, engaged citizens. The successful execution of these missions can be seen every day across the TeamCFA Network. Examples include:

- Pioneer Preparatory School: A Challenge Foundation Academy in Arizona, conducts an annual Project Pride community service event where the students and faculty cleanup graffiti and prepare the gardens in their Maryvale community. In 2015, 62% of the school's English Language Learners were successfully reclassified, which is more than double the state reclassification rate.
- The Western School of Science and Technology: A Challenge Foundation Academy, also in Arizona, is in its second year of operation and has a STEM-focused curriculum. The school promotes engineering through its Building Warriors club, with hands-on opportunities to build structures for various civic projects, including the cooperative rebuilding of their sister school Pioneer's playground after it was destroyed in an arson attack.
- Brevard Academy: A Challenge Foundation Academy serves a rural area of Western North Carolina. Prior to joining the Network, the school had gone through a tumultuous turnover in leadership. It is now a B rated school with a continuously increasing enrollment and a new building in development.
- Piedmont Community School: A Challenge Foundation Academy serves a highly diverse population of students in Gastonia, North Carolina. They have an elementary campus and a high school campus. Every grade level has its own specific community service project and their civic clubs have been featured in local media.
- Shining Rock Classical Academy: A Challenge Foundation Academy, a first-year school in rural Waynesville, North Carolina, emphasizes the health benefits of outdoor activities and conducts frequent field trips to take advantage of the natural beauty of the area. Students have participated in multiple community events, including a recent schoolwide cleanup of Lake Junaluska and the Haywood Waterways Association's polar plunge fundraiser.
- Thomas Jefferson Classical Academy: A Challenge Foundation Academy has served multiple rural North Carolina counties since 1999. The graduating class of 2015 received combined academic scholarships of over \$7 million. The Washington Post has recognized the school as among the top 1% of US high schools for preparing students for college.

With this history of success, coupled with the experiences and lessons learned over the past 25 years, TeamCFA is positioned and prepared to provide startup funding, technology grants, school board training, leadership development, staff professional development and other support services to ensure the successful start up of new community based schools. TeamCFA's immediate focus in Indiana is to support the development of two new schools: one in South Bend and one in the Far Eastside of Indianapolis as reflected in this application. Implementing a slow growth model (beginning with grades K-2 and up to 300 students), each school will provide a quality K-8 academic program for up to 900 students at full maturity and capacity.

TeamCFA is first and foremost committed to ensuring the success of the schools with which it is currently working; however, as part of TeamCFA's mission, it is committed to support the development of academically rigorous, financially sustainable charter schools and will consider expanding its support to existing Core Knowledge schools interested in joining the Network as well as recently approved charter organizers with aligned missions.

**Target Population.** RP:CFA will be located on the Far Eastside of Indianapolis, targeting the families residing near 38<sup>th</sup> Street and Post Road. This school will be developed as a neighborhood school to support the academic needs of students in the surrounding community who are currently without quality educational options near their homes. Five of the seven identified schools within 5 miles of our target community were rated D or F by the State.

The needs in this community are great and RP:CFA recognizes that others, too, are focused on providing improved educational options for this area. RP:CFA will focus its efforts on not only a specific neighborhood, but the youngest of students in that neighborhood. The organizers see the youngest elementary students as a change agent for their communities. Focusing on K-8 lays a foundation for successful learning in later years. Implementing a slow growth model has been effective in the Network when developing community schools. Deliberate slow growth allows for implementation and practice of the vision and culture of the school as well as targeting time and interventions to a smaller, younger group of entering students who are likely academically behind. As students grow with and through RP:CFA, the Board of Directors may assess the need for a high school. TeamCFA is an appealing partner for the organizers because of its proven success and commitment to ensuring high quality education options, including exploring the possibility of developing high schools in order to support the continuing education of the schools' students should other quality high school options not be available.

**Community Engagement.** In the spring and summer of 2015, TeamCFA began actively engaging community organizations and identifying potential partnership opportunities in the Far Eastside of Indianapolis. TeamCFA met with the Community Alliance for the Far Eastside (C.A.F.E.) executive director Melissa Drew and C.A.F.E. board member Tom Crouch. C.A.F.E. is a social service organization and community development corporation that exists to improve the quality of life for those who live, work and worship in the Far Eastside community. C.A.F.E. and TeamCFA discussed future partnerships that would bring job training and medical services on our campus for the families we serve. TeamCFA also met with La Plaza. La Plaza advocates and prepares Latino students for educational success by connecting Latino families to health and social services. RP:CFA will discuss collaboration opportunities with La Plaza to engage the Latino community and provide services to students and families that would support student success. It was with the support and encouragement of La Plaza's Director of Programs, Dulce Vega, that two of the RP:CFA board members were identified. Another key player in connecting with the community was Charles Ingram, the Mayor's Eastside Community Liaison. Mr. Ingram has agreed to introduce our school to local congregations and business leaders and has been helpful in scouting potential locations for RP:CFA. Our post-application engagement plan is to continue identifying

representatives of community organizations to serve on the school board to develop a true community school. Opportunities for partnerships and evidence of support are reflected in the letters of support provided as Attachment 16.

**Education Plan/School Design.** The education plan/school design included in this application is a replication of the strongest elements of schools in the TeamCFA Network. Specifically, the school will implement the Core Knowledge Sequence, Core Knowledge Language Arts (CKLA) and Singapore Math as the curricular foundation for its educational programs and utilize technology to enhance and support instruction.

When Governor Mike Pence delivered his 2015 State of the State address, he spoke of “the evil that came to the streets of Paris” earlier that month. He twice mentioned the city of Washington. And he spoke about budgets: indeed, he mentioned the word budget ten times. Six years earlier, when President Barack Obama delivered his first inaugural address, he spoke about those who “settled the West.” He spoke about those who “endured the lash of the whip.” He spoke about “places like Concord and Gettysburg, Normandy.” Governor Pence assumed that his listeners knew what Paris is, what Washington is, what a budget is. President Obama assumed that his listeners knew about westward expansion, slavery, and the location and significance of Concord, Gettysburg, and Normandy.

RP:CFA will give children the background knowledge that allows them to understand all of these things and so much more. RP:CFA believes in the Core Knowledge philosophy: that every person in a diverse democratic society deserves equal access to the common knowledge base that draws together its people, while recognizing our differing traditions and contributions; that offering universal access to this shared knowledge is a primary duty of schooling, critical to literacy, and to the closing of the achievement gap between ethnic and racial groups; and that shared knowledge, a shared narrative, and shared ideals of liberty and tolerance are indispensable ingredients for effective citizenship and for the perpetuation of our democratic institutions. Implementing the Core Knowledge Sequence provides every child with content in language arts and literature, history and geography, math, science, music and the visual arts in grade-by-grade, year-by-year, coherent, age appropriate progression that is aligned with the standards of the State. Details of Core Knowledge are provided in Attachment 11.

In the early development of the Network, TeamCFA partnered with schools that were implementing Core Knowledge or were looking to improve their academic performance through the implementation of Core Knowledge. Numerous studies (detailed in section 1.6 of Education Plan) have shown that the Core Knowledge program is efficacious in educating proficient learners, including increasing achievement in areas of socio- economic need. Schools that have been in the TeamCFA Network for three years or more have seen student growth on the NWEA MAP assessments rise dramatically each year the schools are in the Network. TeamCFA established schools demonstrate an average proficiency rate on the NWEA MAP test of 77.4% in math and 80.2% in reading.

**Network Governance and Leadership.** Experienced leaders make up the Board of Directors (“School Board”) of the newly established nonprofit corporation that will hold the charter and oversee the school operations. The School Board will enter into an affiliate agreement with TeamCFA to support the school. Because TeamCFA is a support organization rather than a traditional management organization, the success of this new school start up model relies on the commitment and determination of the local community. TeamCFA is a charitable foundation that supports a network of public charter schools across three regions. To support TeamCFA’s Network expansion, particularly its continued expansion in Indiana, TeamCFA has identified a team of experts in academics, business, governance and educational technology to provide “best in class” services to its schools. The School Board will maintain governance

and operational and fiscal oversight of the charter school, and Team CFA will provide support in the day-to-day operations of the schools and will support the School Board in all aspects of new school start-up.

## Section I: EVIDENCE OF CAPACITY

### Founding Group

#### Founding Group Membership

1. In furtherance of its goals to support schools in their missions to develop thoughtful, articulate youth who are prepared to become productive, accountable, engaged citizens, TeamCFA has partnered with Rosa Parks: A Challenge Foundation Academy, Inc.'s Board of Directors for the development of Rosa Parks: A Challenge Foundation Academy ("RP:CFA"). The RP:CFA Board of Directors includes:
  - Todd Relue serves as chairman of the board. Todd G. Relue is the co-chair of the Education Law practice group at Plews Shadley Racher & Braun LLP. He concentrates his practice in the areas of education law, commercial real estate, and complex litigation. Todd regularly advises charter schools, private schools, and affiliated organizations on a variety of legal issues including charter approval, school formation, land acquisition, construction, leasing, governance, replication and expansion, sponsor relations, and sustainability. Todd also represents clients in environmental and insurance recovery matters at all stages of state and federal litigation and has developed substantial first-chair trial experience. His broad real estate practice involves leasing, lending, construction, and acquisitions of properties from corner stores to multi-million dollar developments. Todd also regularly guides clients through the complexities of buying, selling, and remediating properties with unique environmental concerns. Among other community activities, Todd serves as President on the Board of Directors for Heritage Place of Indianapolis, is a member of the Indiana State Bar Association's Legal Ethics and Improvements in the Judicial System Committees, and volunteers his time assisting the Center for Inquiry, the Judges and Lawyers Assistance Program, and the Moot Court Board at the Indiana University Robert H. McKinney School of Law.
  - Keyon Whiteside serves as the vice chairman of the board. Keyon currently serves as the Senior Developer for Willow Marketing Inc. As senior developer, Keyon oversees the Digital Department, while being responsible for the department's profitability and the management of its personnel. Keyon also owns and operates his own I.T. Company, Creative I.T. He attributes his discipline, leadership skills, patience, and the mental toughness necessary for success in business to his time with the NFL. Keyon serves as a board member for Indianapolis Academy of Excellence: A Challenge Foundation Academy. He has been instrumental in the school's recruitment efforts and has supported its development of community relations.
  - Javier Barrera, originally from Veracruz Mexico, is an Indianapolis-based social entrepreneur and media strategist specializing in multicultural marketing and localization. His work focuses on exploring the intersection between marketing and urban education and their effect in identity formation. Javier is a founding member of the Latino Youth Collective, a program that provides resources and opportunities for youth to engage in personal and community development through critical pedagogy, grassroots organizing and collective action. Javier also serves as the director of the Campechne Youth Academy, a summer research program that trains and employs youth to conduct research and enact social change in their community.
  - Jeannette Bray started her teaching career teaching middle and high school English in the Grand Canyon school district, the Chino Valley district, and the Prescott Valley school district, all in Arizona. While working in the Chino Valley district Jeannette became her administrative career



working as a Dean of Students. Jeannette became an assistant principal at the Parkview Charter School moving to the Principal's position where she directed the school for three years. During that time Jeannette participated in the Arizona Department of Education's pilot program on teacher evaluation. Jeannette became an instructional coach for TeamCFA in 2015, supporting schools in Arizona, Indiana and North Carolina. Jeannette is married to a Prescott police officer and is the mother of 3 boys, twins aged 14 and an 8 year old.

- Charlie Garcia is President of Kali Systems LLC. Garcia's greatest contributions, he says, are his efforts to mentor aspiring entrepreneurs. The mentoring program he developed has been adopted by the Greater Indianapolis Chamber of Commerce to assist minority and women owned businesses to grow at rates of 20 to 60 percent. As a founder of the Indiana Hispanic Scholarship Foundation, Charlie has helped increase educational opportunities for first-generation Hispanic college students. Charlie serves on the board of Avondale Meadows Academy and Indianapolis Academy of Excellence: A Challenge Foundation Academy.

TeamCFA will complement the talents and skills of the RP:CFA Board of Directors, providing access to and support from its identified team of experts in academics, business, governance and educational technology to appropriately provide services to schools in the Network. These experts will play a substantial ongoing role in school development. In addition to the support in the application development, the TeamCFA experts will provide leadership training for the school leader, pre-service and on-going in-service for the school staff, assistance with facility identification, student recruitment, and other support as identified and requested by the School Board. The TeamCFA experts will support the members of the community who have volunteered to serve as the School Board for each of the charters.

As delineated in the resumes provided in Attachment 1, the Founding Group has strong collective qualifications for assuming stewardship of public funds and for establishing a high quality school meeting the needs of the targeted community including:

School leadership, administration and governance - experience includes charter school development, administrators responsible for staffing schools with quality instructors and providing on-going professional development, service on boards of directors of charter schools, and extensive experience in charter school law.

Curriculum, instruction and assessment - experience includes providing appropriately challenging classroom instruction in a variety of grade levels and content areas to meet the instructional needs of students at all academic levels, curriculum development, data analysis and coaching for school improvement, and serving in leadership positions on academic teams.

Financial, business and operations management - experience in the private and public sector including budget development and financial operations, extensive experience in government and regulatory compliance and drafting policies and procedures.

Performance management - experience in developing data-based performance goals and implementing evaluation systems for program wide improvement, targeted improvement, and individual performance evaluation.

Parent and community engagement - extensive experience in student recruiting, civic engagement and community outreach in a variety of communities.

Facilities management - experience in day-to-day facilities oversight, and facilities acquisition and financing resulting in low-cost, high-quality facility solutions.

2. The following organizations have played a considerable role in contributing to the plans and development of RP:CFA:

As previously discussed, TeamCFA has played and will continue to play a critical role in the development and operations of RP:CFA. TeamCFA endeavors to support the development of academically rigorous, financially sustainable charter schools by employing proven academic, business and governance practices and leveraging the free market to provide quality academic seats in neighborhoods where they don't currently exist or are extremely lacking. The School Board will maintain governance and operational and fiscal oversight of the charter schools, and Team CFA will provide support in the day-to-day operations of the school and support the School Board in all aspects of new school start-up. TeamCFA has spent considerable time in Indiana working to engage with the community and helping the School Board respond to the need for additional quality education options in their community.

**Limestone Strategies, LLC** was instrumental in helping the Founding Team understand the needs in Indiana and networking across communities. As a full-service policy, development, communications, and advocacy firm comprised of professionals with a combined 72 years of experience, Limestone's knowledge of Indiana communities as well as education policy, implementation, and practice were instrumental for engaging the communities and working to adapt TeamCFA's proven quality model to Indiana's laws, structures, and needs.

**Challenge Foundation Properties (CFP)** is a nonprofit corporation that promotes financially stable, self-sustaining charter schools by providing access to low-cost, high-quality facility solutions. CFP is a general support organization for TeamCFA network school facility needs. CFP is a creative facilities supplier, providing options during the difficult start up years. All options are provided at market price or below. As the school becomes fully occupied, leases are structured to provide incentive for schools to seek alternative financing so schools may become self-sustaining. As a result, CFP may recover any capital provided and invest it into the next school project. CFP was engaged for the identification of possible facilities for RP:CFA.

**INIschools** is affiliated with Goodwill Education Initiatives, Inc. and Goodwill Industries of Central Indiana, Inc. and operates under a nonprofit designation. INIschools' mission is to support schools by providing administrative functions within a cost structure that maximizes the flow of revenue into the classroom. Upon successful application, the School Board will have the opportunity to further engage INIschools for the supports its experts can provide in completing pre-opening tasks, developing a fully functional in-house financial accounting system, and providing comprehensive special education services as well as managing the school's registrar, state reporting and compliance functions.

School Board members and TeamCFA staff have reached out to a number of community organizations within the target location. The letters of support included in Attachment 16 demonstrate the breadth of community partnerships being developed.

3. The RP:CFA School Board is comprised of individuals who see a need for improved education and additional high quality educational options for the community. TeamCFA is devoted to partnering with communities where such seats are lacking. TeamCFA believes that each school should maintain local autonomy and uniqueness akin to their respective communities, but each school need not be alone in their endeavors to provide quality education. The School Board has chosen to join the TeamCFA Network to develop a solution to the community need as outlined in the Executive Summary. More than 6,700 students across three regions are benefitting from the quality options offered by the fifteen TeamCFA Network schools. Over 400 of those students are attending schools that opened in the fall of 2015.

### School Leader and Leadership Team

1. As an affiliated school, RP:CFA's selected school leader will participate in TeamCFA's one-year school leadership program. Following the approval of the charter application in May, the School Board, in collaboration with TeamCFA, will aggressively recruit and hire a school leader. TeamCFA will help the School Board facilitate a search to identify the strongest candidate for the school. TeamCFA's School Support Team will collect and review resumes, prescreen applicants, and coordinate and participate with the School Board in the interview process of the strongest candidates. Posting for the position will be complete by April 15th including a job description. Candidates will be screened and interviewees selected by May 15th. The school board and the Team CFA School Support Team will work together to interview candidates and select a school leader by June 15th. The hiring process will be completed by July 1 and the successful candidate will assume his or her responsibilities in the Leadership Development Program thereafter. Training will include all facets of school leadership in an assigned TeamCFA Network school as well as a variety of school settings across the TeamCFA Network. The selected candidate will also participate in seminars designed to support the development and launch of a new school serving the identified target population and create opportunities to develop relationships with community organizations and families. Through the Leadership Development Program, the school leader will work closely with the School Board, both in reporting progress and engaging the School Board in start-up activities. TeamCFA's Director of Leadership Development and School Support will review the progress of the school leader and obtain feedback from the School Board to customize training as appropriate. An outline of the full year program has been included as Attachment 2.
2. The target opening date for the new school is one year after application approval. The selected school leader will be a full-time participant in the TeamCFA Leadership Development Program, reporting to TeamCFA's Director of Leadership Development and School Support and receiving a salary and benefits, paid by TeamCFA, commensurate with entry-level school leadership positions. Upon completion of the program and the opening of the new school, reporting and compensation requirements transfer to the School Board.
3. The school administration will grow to support the needs of the population over time. Because the school will open with up to 300 students in Kindergarten through second grade, in addition to the school leader, the initial administrative team will include a dean of students, social worker and an administrative assistant/registrar. The school leader, as part of the Leadership Development Program, will recruit and hire the administrative team. Finalized job descriptions and commensurate salaries will be set by the School Board no later than December 30th. Recruitment and hiring will take place between February and May. Positions will start July 1st.
  - The dean of students will act as the assistant school leader. The dean will be responsible for family outreach, community event coordination, and safety and emergency response oversight.

The ideal candidate will have 3-5 years minimum experience in an education setting as a teacher or in a student support position. In addition this candidate should have experience organizing community programs.

- The school will benefit from the expertise and assistance of a social worker that understands and can respond to our target population’s needs. Minimally, the social worker will assess the students’ support systems, identify barriers to academic performance and connect with community resources as well as collaborate with other professionals to enhance the learning environment and school culture. The ideal candidate will have a school social worker license.
- The administrative assistant/registrar will manage the back office operations of the school including the coordination of all state reporting requirements in conjunction with a contracted vendor such as INIschools. This detail oriented person with great people skills will also answer phones, process student enrollment, and manage the school’s front desk.

## Governance

### Legal Status and Governing Documents

Please see Attachment 4 and Attachment 5 for supporting documents.

#### Governing Board

1. Governance Structure and Composition. With over 25 years of experience working with charter schools, TeamCFA has learned that governing a charter school effectively takes diverse experience, comprehensive training, and dedication. This experience, coupled with TeamCFA’s belief that a locally autonomous governing board should govern the charter school, guided the development of the affiliate agreement for Network schools.

The provides the legal relationship between the school and TeamCFA. The Affiliate Agreement identifies that: (1) the affiliated school will be called a Challenge Foundation Academy or “CFA”; (2) the school will offer structured and rigorous academic programs that include a committed partnership among students, teacher and parents; (3) the school will follow the Core Knowledge Foundation’s Core Knowledge Sequence; and (4) the school accepts the supports (both monetary and expertise) provided by TeamCFA. By committing to these items in the Affiliate Agreement, TeamCFA will, in turn, provide startup funding, technology grants, school board training, leadership development, staff professional development and other support services to ensure the school’s successful start up, and will participate in activities to support the school as well as the Network as a whole.

The Affiliate Agreement clearly articulates that the affiliated school is and shall be governed by its School Board, which is responsible for overseeing the school’s operations. It further states that TeamCFA will provide support assistance to the school, subject to the School Board’s direction, oversight policies, the requirements of the Agreement, Charter School Laws and other applicable law. Nothing in the Agreement is to be construed to interfere with the School Board’s authority and duty to exercise its statutory, contractual and fiduciary responsibilities with sole governing authority over all of the school’s operations. The School Board has, and retains, the right to exercise its judgment in accepting or rejecting TeamCFA’s recommendations related to support assistance. A copy of the Affiliate Agreement is included as Attachment 8.

TeamCFA established a nonprofit corporation for each new school with TeamCFA employees as the initial board members. As TeamCFA developed relationships in the community, it established

partnerships and identified community members whose mission and vision aligned with that of TeamCFA. Individuals dedicated and eager to participate in the development and support of a new community school were then named to replace the initial board of directors and assume the role of founding School Board members. This model is intended to remove any financial or legal burden of starting a new nonprofit corporation from a group of individuals seeking to improve the academic outcomes in their community. These individuals, along with two TeamCFA appointed members (see Affiliate Agreement) will comprise of the School Board and govern the charter school. TeamCFA will continue to provide support through regular board training, a menu of pre-service and in-service professional development, and other benefits that come with being a part of the Network.

In accordance with the Articles of Incorporation and corresponding bylaws for the nonprofit corporation, the School Board may have 5 to 11 members. The members of the governing board are identified in the Founding Group Members Section of the application. As detailed in that section, the board has strong collective qualifications for assuming stewardship of public funds and for establishing high-quality schools meeting the needs of the targeted community. Signed Board Member Information Sheets for each Board member are provided in Attachment 6.

2. Pre-Existing Nonprofit Organization. The documents provided within this application are for the nonprofit organization, Rosa Parks: A Challenge Foundation Academy, Inc., formed for the purpose of charter school governance in accordance with Indiana's Public Laws, including the Open Door Law. Directors and officers of the organization will be updated with the required annual filings.
3. Governing Entity's Responsibilities. The roles and responsibilities of the School Board include the general oversight of the operations of the charter school, including fiscal management, academic accountability, and policy development of the school. More specifically, the board will be responsible for approval of the yearly budget, monthly review of the financial statements and the implementation of the budget, and selection and engagement of an approved auditor who will complete a yearly audit as prescribed by Indiana statute. The board will also review academic data to ensure the school is meeting its goals and objectives for educational growth and achievement and will annually review the performance of the School Director.

Although the academic and fiscal health of the school is ultimately the responsibility of the School Board, TeamCFA will continually monitor the academic and fiscal strength of the school and review the school's adherence to sound governance practices. When deficiencies are noted, the School Board will be immediately notified. The school will seek support, guidance and/or intervention as needed from TeamCFA. For so long as the school remains affiliated with the TeamCFA network, TeamCFA will appoint two members of the Board of Directors to provide the school with guidance, support and a connection to TeamCFA.

4. Procedures. Since the initial board of directors for the school was comprised of TeamCFA employees, the members of the board began meeting regularly in March 2015 to discuss TeamCFA's expansion plans in Indiana and the development of RP:CFA. Having laid the foundation by creating the nonprofit corporation and in anticipation of the transition of the board membership to the local community members identified for the school, initial board members resigned their positions and the meetings ceased. With the formation of the founding community board (referred to in this application as School Board) meetings resumed to adopt the school mission and goals for the school. Once the charter has been approved, the School Board will meet, at a minimum, ten times each year but may call special board meetings as needed to ensure proper oversight and responsibility for the

school. The School Board will create standing subcommittees, as needed, to support and govern the school's operations.

TeamCFA will ensure all of the School Board members, as well as the School Director, are trained on the Indiana Open Door Law and Indiana Access to Public Records Act. Further, TeamCFA's Regional Director assigned to Indiana will monitor board proceedings and communicate with the TeamCFA board representatives on the School Board to support compliance with the Laws. Specific or refresher training will be provided as needed and when requested by the School Board. Additionally, all Board Members will be invited to regular board training events provided by TeamCFA.

5. Ethics and Conflicts of Interest. The School Board of RP:CFA is guided by principles that create a strong academic and fiscally responsible culture. These core beliefs are designed to guide the board of directors in their decisions and all decisions will be made to ensure high academic standards, champion free-market principles, create a financially sustainable cost effective school, and provide effective oversight.

All actions taken by the School Board will adhere to the principles and core beliefs as set forth in the Code of Ethics. When contemplating entering into a transaction or arrangement, the School Board will consult the Conflict of Interest policy to determine if and how to handle a potential conflict of interest. A copy of the Code of Ethics and Conflict of Interest Policy for the school can be found in Attachment 7.

6. Advisory Bodies. An Advisory Council (Friends of RP:CFA) will be established for the school. The Advisory Council will consist of community members and organization leaders within the community that are committed to providing a quality education to the students within the community. The Advisory Council will meet quarterly, providing two-way communication between the school and the community regarding current events and matters of importance to the school such as social service offerings, job development, shared projects, troubleshooting common challenges, etc. As advisors to the School Board, the Advisory Council members are encouraged to attend board meetings and develop recommendations to the board specifically regarding the needs of the community. The Advisory Council, in close connection with the TeamCFA Regional Director, will also elicit support from the local community and assist with enrollment activities, promotional events, and education about TeamCFA and the school. In addition to providing consistent and on-going communications with the various organizations within the community, the Advisory Council will serve as an incubator for candidates to serve as future board members of the school.
7. Grievance Process. In dealing with academics and student discipline, each of our schools' staff will dedicate itself to maintaining a balance between consistently applying school policy and procedures and recognizing that each situation is unique. This balanced approach will ensure that disciplinary procedures are individualized to help students see reasonable connections between their behavior and the resulting consequences. Staff, students and parents will be encouraged to bring concerns and questions to the attention of the school administration, and/or the School Board in accordance with the Grievance Policy.

#### **Grievance Policy**

Our school will ensure that all employees understand and fulfill their responsibilities in implementing the grievance policy. This policy will be upheld by implementing guidelines outlined below through the provision of support and, if necessary, appropriate disciplinary sanctions.

**Grievance Procedure Background.** From time to time, staff, students, parents or community members may have concerns or complaints about incidents or practices occurring in the school.

Our school is committed to fair and speedy resolution of all such matters. The guidelines outlined below set out the procedures that should be implemented to resolve concerns or complaints. It is intended that most matters be resolved at the local/individual level; however, in some cases that may not occur. In such circumstances, the grievance may be addressed to the Grievance Committee (which is appointed annually by the Board of Directors) for resolution.

**Making a Complaint.** Any person or group of people with a complaint should provide, in writing, their concerns, to the School Director. If the School Director is the subject of the complaint, the written complaint may be delivered directly to the Grievance Committee Chair. The written complaint must, at a minimum, include: (1) the name of the individual(s) filing the complaint; (2) a description of the alleged incident or employee's conduct, including specific dates, times, witnesses and locations; (3) a description of any attempts to resolve the incident outside of this grievance policy; and (4) the signature(s) of the individual(s) filing the complaint.

*Please note: The person(s) making the complaint should have either directly experienced or observed the alleged incident. Individuals or groups may approach any staff member to help them bring their complaint to the School Director if they are uncomfortable approaching this person directly. Additionally, a parent/guardian may lodge a complaint on behalf of his/her child.*

**Investigating the Complaint.** The School Director will promptly – and in no case later than five business days following receipt of the complaint – provide a copy of the complaint to the Grievance Committee Chair and inform the person(s) making the complaint of the following: a) the process by which the complaint will be investigated and the confidential nature of that process; b) the right to be protected from retaliation by any person associated with the school; and c) the right to contact the school Grievance Committee Chair for additional resolution or investigation.

Immediately following receipt of the Complaint, the School Director, together with any persons deemed appropriate, will initiate an investigation as follows:

1. Conduct all interviews in a closed forum and treat all documents as confidential;
2. Record all response information (otherwise known as testimony) via transcription or recording;
3. Interview the person(s) who made the complaint and any other person who may be able to assist the investigation; and
4. Interview the person or group against whom the complaint is made and inform them of the investigation process and their rights.

Upon completion of the investigation, but in no event later than 30 days from receipt of the Complaint, the School Director will:

1. Determine a solution that attempts to satisfy all parties and that is consistent with the policies of the school or in the alternative, if circumstances exist that preclude the School Director from making a decision or providing for resolution, refer the matter to the Grievance Committee for a decision. The action taken may include: a) provision of a support program; b) formal disciplinary action; c) dismissal of the complaint as groundless; or d) other options as determined by the nature of the complaint.
2. Prepare a written report for the Grievance Committee Chair, which shall include a description of

the investigation, a summary of the facts and information, a description of the decision and/or solution and the rationale for such decision and/or solution.

3. Advise all parties in writing of the decision and/or solution, the rationale for such decision, the parties' right to appeal and a description of the appeal process.

**Appeals.** Should the complainant or the alleged believe the decision of the School Director was procedurally flawed or violates existing policy, they may appeal to the Grievance Committee within ten (10) calendar days of the date of the School Director's written decision by submitting in writing their concerns clearly outlining the basis for the appeal including the solutions and any pertinent follow up actions.

The Grievance Committee will conduct the appeal as follows:

1. Convene the full committee and review the appeal within 30 calendar days of receipt of the appeal;
2. Review all the available material provided in the complaint, including the original documentation from the School Director;
3. Listen to any recordings or review the transcripts included in the initial investigation and/or conduct additional investigation;
4. Determine whether or not the decision of the School Director was procedurally flawed, violated existing policy, or support the initial solution;
5. Make a decision within 60 calendar days of the appeal;
6. Decide whether to uphold or overturn the decision of the School Director. If the School Director's decision is deemed to be procedurally flawed or in violation of existing policy, the matter shall be returned to the School Director for consideration within the scope of existing procedure and policy; and
7. Advise all parties in writing of the committee's final decision.

**Confidentiality and Protection of Employees Filing Complaints.** Any staff member following procedure to file a complaint against any other employee for any conduct construed as breaching policies and/or procedures outlined in this staff handbook is protected from retaliation that may threaten job security at the school.

### School Management Contracts

TeamCFA, as previously described, is not a charter school management organization. Rather, it functions as an Education Service Provider, and provides support to the schools in its network. Its support services include school design expertise and start-up support in the form of services, training, and financing to each of the proposed new charter schools established under this application. Upon approval of this application, TeamCFA will continue to make available to the school support services, grants, training and a network of experienced charter operators.

As a charter support organization, TeamCFA does not charge fees for its services and support, does not manage the schools in its network, and does not provide any managerial or instructional staff to the school<sup>1</sup>. Therefore, TeamCFA does not meet the definition of an Educational Management Organization as set forth in Exhibit K to this application. Nevertheless, Attachment 8 is provided to serve as further

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<sup>1</sup> TeamCFA Foundation may place a Leadership Intern at an existing network school for on-the-job training as part of TeamCFA's Leadership Development Program. While the school will receive the benefit of an administrative person on-site, that person is a trainee and would not be considered management.



explanation of and to provide background information and documentation on the structure of the TeamCFA Network.

**Network Vision, Growth Plan & Capacity**

Please see Attachment 9 for 5-year business plan.

**Network Management**

1. TeamCFA provides a variety of services to its Network schools. These include: access to Leadership Program Candidates, school director professional development and support, teacher professional development, TeamCFA Resources website ([www.teamcfaresources.org](http://www.teamcfaresources.org)), school website development and maintenance support, school email support, technology support, technology grant opportunities, provision of two Board representatives, Board dinners and staff luncheons, community relations support, teacher recruitment assistance, and Network collaboration opportunities. There is no cost to the schools for these support services. School leaders and TeamCFA board representatives communicate their support requests directly to appropriate TeamCFA staff. Regional Directors attend board meetings, meet with school leaders, and visit classrooms to gain an understanding of potential needs and identify areas of strength as possible models for other schools in the Network. Each of the TeamCFA service providers are evaluated by the TeamCFA leadership annually. Evaluations include input from the schools and their governing boards.

2.

Function	Network/Management Organization Decision-Making	School Decision-Making
Performance Goals	Agreement requires dedication to student achievement and encourages steady academic progress	School Board sets the expectations for its school based on state and internal assessment data
Curriculum	Agreement requires the school to follow the Core Knowledge Sequence. TeamCFA supports the use of Singapore Math. Compass Learning is provided at a reduced rate – not required.	School determines how best to implement the Core Knowledge Sequence with State Standards and adopts additional curriculum for other content offerings and additional school focus areas.
Professional Development	TeamCFA provides a menu of PD offerings. All new schools commit to TeamCFA pre-service training.	School has autonomy to provide any additional PD.
Data Management and Interim Student Assessments	Agreement requires cooperation with State requirements. TeamCFA requires NWEA MAP assessments.	School has autonomy to add assessments and school management data. School is responsible for all state and authorizer data reporting.
Grade Level Promotion	No authority; may provide	Standards set by school.

Criteria	recommendations based on Network best practices.	
Culture	No authority; may provide recommendations based on Network best practices.	School has autonomy to develop its culture.
Budgeting, Finance, and Accounting	No authority; may provide recommendations based on Network best practices.	School is responsible for budget and accounting.
Student Recruitment	TeamCFA provides marketing materials and funds to support marketing efforts.	School develops and leads its marketing plan.
School Staff Recruitment and Hiring	TeamCFA provides assistance with school leader recruitment. TeamCFA will make teacher resumes available when collected as job fairs.	School has discretion in hiring staff.
HR Services (payroll, benefits, etc.)	No authority.	School is responsible.
Development	TeamCFA provides a loan to grant program.	School is responsible for fund raising activities.
Community Relations	TeamCFA provides support via Board representatives, Regional Directors, and Network promotions.	Driven by school.
Information Technology	TeamCFA provides support	School is responsible for maintenance and additional technology.
Facilities Management	No authority.	School manages.
Vendor Management/Procurement	TeamCFA provides access to vetted providers.	School manages.
Other Operational functions, if any	NA	NA

3. Please see Attachment 10 for Organizational Charts for RP:CFA as well as TeamCFA.

**Section II: SCHOOL DESIGN**  
**Education Plan**

**Curriculum and Instructional Design**

1. Framework.

Basic Learning Environment. The instructional learning environment that will be implemented in RP:CFA is based on the belief that we can take the best of traditional education, and weave into it today’s exceptional, high-quality technology resources that are available to our teachers and students. Considering the achievement gap growing in our educational system, we believe it is necessary to begin with a strong content-based curriculum, Core Knowledge, and pair it with

technology resources to support and enhance the curriculum. These resources will assist in remediation, enrichment and with individualizing instruction which can, at times, become a daunting task for teachers. Allowing ample time for direct instruction, small group instruction, and individual digital instruction which focuses on the learning paths created for each student and targets their specific deficiencies, RP:CFA staff will be able to close achievement gaps in a focused and efficient way while enabling students to expand their knowledge base at the same time.

Class Size and Structure. Just as education has shifted to a “one size does not fit all” landscape, so has the way a classroom is viewed in terms of student population size and physical layout. We believe that it is to our students’ advantage that they are in classrooms where the teacher to student ratio is approximately 1:25 in grades K-5, and perhaps slightly larger in grades 6-8. This structure provides teachers greater opportunities for active one-on-one interventions with students to clarify any misconceptions that students may have, allowing learning to move forward at a faster pace and in line with the rigor of our curriculum. Depending on the grade level, the time allotted for small group and individualized instruction will occur in tandem and will take place in the classroom. The small group sessions will occur in a pod-like setting with the teacher and a group of students that are placed together intentionally for interventions in a particular skill area in which this group is deficient or advanced. Technology is incorporated in the classroom design to support the curriculum and provide opportunities for individualized instruction as described in the technology section below.

Overview of Curriculum. All TeamCFA schools use the Core Knowledge Sequence as their curriculum in grades K-8 in language arts, history and geography, mathematics, science, art, and music. The Core Knowledge Sequence is a “coherent, cumulative, and content-specific core curriculum”<sup>2</sup> developed by the Core Knowledge Foundation, a nonprofit organization founded by E. D. Hirsch, Ph.D., Professor Emeritus of Education and Humanities at the University of Virginia.

The Foundation explains, "the Core Knowledge Sequence provides a clear outline of content to be learned grade by grade so that knowledge, language, and skills build cumulatively from year to year. This sequential building of knowledge not only helps ensure that children enter each new grade ready to learn, it also helps prevent the repetitions and gaps that so often characterize current education." As demonstrated in Attachment 11, Core Knowledge Sequence is aligned with grade level Indiana Academic Standards.

The School Director will act as the school’s Core Knowledge Coordinator and he or she will work with teachers to ensure that the Core Knowledge curriculum is aligned with all required state academic standards. RP:CFA’s curriculum will align with the Indiana State Standards and, consequently, the Indiana Reading Evaluation and Determination-3 (IREAD-3) and Indiana Statewide Testing of Educational Progress Plus (ISTEP+) assessments. The School Director will use "Create Your Own Alignment: Guidelines from the Core Knowledge Foundation" as a reference text in completing this task. Curriculum experts with TeamCFA will further be available to provide support to the School Director. The alignment will be created before the school opens and revised as needed in subsequent summers.

While Core Knowledge addresses the sequence of math concepts, it is not a comprehensive math curriculum. The Singapore Math program will be the comprehensive curriculum used for math

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<sup>2</sup>Source: Core Knowledge. Retrieved from <http://www.coreknowledge.org/about-the-curriculum>

instruction. This program's visual and hands on lessons, layered strategies that build conceptual knowledge and alignment with Indiana Academic Standards are beneficial to our student population and will support student success on ISTEP.

The School Director, staff and School Board will evaluate the all curriculum on a periodic basis to assess the effectiveness of the program with our student population.

Use of Technology in Delivering Instruction. Technology is considered a tool to support our highly qualified teachers in conveying our curriculum. Teachers will have access to a variety of technologies including interactive projectors, document cameras, and classroom sets of chromebooks. The classroom set of chromebooks will allow each student to have their own device. During the portion of the day allocated for small group and individualized instruction, these devices will be available to access Individualized Learning Paths, created on the Compass Learning program or by the classroom teacher. Each student's Individualized Learning Path is revised 3 times per year, following NWEA testing sessions, to build standards based reading and math skills. Teachers will also have access to <http://www.teamcfaresources.org/>, a website developed by TeamCFA's educational technology staff. This site includes links to over 2,400 free K-8 online lesson resources organized by grade and subject, allowing teachers to create their own lesson plans in a cost-effective manner.

Plans for Ensuring the School is Staffed with Highly Effective Teachers. Within the TeamCFA Network, each school director is responsible for staffing his or her school with highly effective teachers who are committed to meeting state standards and teaching the Core Knowledge Sequence. The School Director will recruit potential teachers through online advertising on the school's website, attendance at local educational job fairs, and through other means traditionally proven to attract high-quality teachers. In addition, the School Director will explore the possibility of partnering with local colleges, veterans' organizations, and organizations such as Indiana Teaching Fellows and Teach for America. To support the schools' recruiting efforts, TeamCFA will advertise with the career services offices and/or attend education job fairs.

Effectively staffing a school requires ongoing development of all professional staff to meet the needs of students. To assist schools in meeting this responsibility, TeamCFA offers regional and national support. TeamCFA provides schools with a wide range of professional development opportunities for both the school leaders and teaching staff before and during the school year. These professional development opportunities are then supported by regular visits to the school by the TeamCFA School Support team. This team visits classrooms and school administration to observe and support the professional growth of teachers and administrators alike. See the Human Capital section for more information regarding professional development and how staff performance will be evaluated.

Evidence-Based Support. Numerous studies have shown that the Core Knowledge Sequence is efficacious in educating proficient learners, including increasing achievement in urban areas of socioeconomic need.

For example,

- a study of 67 urban elementary schools in Oklahoma found that "students who had spent the year in Core Knowledge classrooms outscored the control students in seven of the eight categories" on the Iowa Test of Basic Skills.

- a study conducted by the Center for Research on the Education of Students Placed At Risk at Johns Hopkins University found that “longitudinal gains as measured on the Comprehensive Test of Basic Skills in reading comprehension have tended to favor Core Knowledge schools that had at least moderate levels of implementation” and that “it is possible for schools that use the Core Knowledge curriculum to succeed particularly well in improving student achievement on standardized tests.”
- a study conducted by researchers at the University of Missouri found that “over the six year review period, the Core Knowledge schools performed well above the national average, with their collective performance increasingly higher than the norm. This performance advantage was evident across the six content areas. The same trend was evident across schools of different sizes, different socio-economic composition, and different ethnic composition. Based on these findings, there appears to be a strong relationship between student performance and the Core Knowledge curriculum.”

For other studies that demonstrate the efficacy of the Core Knowledge Sequence, please see <http://www.coreknowledge.org/research>.

2. The performance of neighborhood schools where RP:CFA plans to locate suggests that the majority of students are likely to enter the schools below grade level. With students arriving at the school typically one to two grades levels behind their peers, RP:CFA will be faced with the question “how do we close the achievement gap?” The answer is with a combination of highly trained, high quality teachers using effective and empathetic management techniques to deliver quality curriculum supported with the purposeful use of technology.

Best practices in teaching are crucial to student success. Both school level leadership and TeamCFA’s School Support Team are well versed in best practices and training teachers for effective implementation. Throughout the year, teachers will work closely with both groups to develop solid instructional practices that include lesson planning and preparation, instructional delivery, assessment techniques and data analysis. Teachers will use data to differentiate whole group instruction and build small groups within their classrooms. This will maximize student growth towards proficiency. Teachers will be coached by the school leadership and TeamCFA Support Team to help teachers provide the best possible environment, through structured procedures and relationship building, for success in the classroom.

Core Knowledge Sequence was specifically designed to address the needs of students in our target population. The curriculum provides a rich source of material that includes a strong visual component, a skill building program, and access to rich cultural material through its Listening and Learning Program. The auditory, visual, and foundational skill components work together to create a cross curricular program that enhances the content and builds a student’s knowledge base, allowing them to learn new material with more ease. With each domain, the students are fully immersed into the content.

We know that simply making technology available to students will not automatically lead to learning gains. School level leaders will ensure that the use of technology is enhancing student learning. This includes active engagement, the opportunity to work collaboratively, frequent and effective teacher feedback, and individualized remediation and enrichment.

RP:CFA will use a computer-based program called Compass Learning which creates an Individualized Learning Path for every student based on their identified academic needs. Identifying deficiencies in

student knowledge and filling gaps in their learning is essential to propelling students toward proficiency and growth. Students will take the NWEA MAP tests three times per year and the data derived from these tests will be used to identify those deficiencies. With this data, teachers are able to target weaknesses in student learning and differentiate instruction to bolster learning in a particular goal performance area. RP:CFA will use a computer-based program called Compass Learning which creates an Individualized Learning Path for every student based on their identified academic needs. Teachers are able to monitor progress and adapt those learning paths as needed.

3. Differing Key Educational Features. The instructional strategies described above coupled with a positive culture and encouraging supportive learning environment has been instrumental to the success of all schools in the TeamCFA Network.
4. Core Curriculum Scope and Sequence. See Attachment 11 for core curriculum scope and sequence by subject, for each grade level proposed, that demonstrates clear alignment with Indiana's Academic Standards. The scope and sequence clearly reflects how the school's curriculum is integrated across subjects and grade levels served, and how it will result in proficiency.
5. RP:CFA will not operate as a virtual charter school.

#### Pupil Performance Standards

1. The school's exit standards for promotion are included as Attachment 12.
2. Policies and Standards for Promotion. Students must attain a passing grade in all courses included in the areas covered by the Core Knowledge Sequence: English/language arts, history and geography, mathematics, science, art, and music. The school will adopt the following grade scale: A+ (97-100), A (94-96), A- (90-93), B+ (87-89), B (84-86), B- (80-83), C+ (77-79), C (74-76), C- (70-73), F (below 70). In addition, students must pass all required state tests.

Students who have earned a failing grade in only one of the courses, as well as students who have not demonstrated proficiency on only one of the state tests, may be promoted at the discretion of the school director after examining NWEA and state test scores for growth and consulting with a committee that includes the Core Knowledge Coordinator and the grade teachers. (This exception does not apply to state tests on which students must demonstrate proficiency in order to be promoted. The school will follow all state requirements with respect to such tests.)

The school's board of directors may impose additional promotion requirements in the future.

Promotion criteria will be communicated formally to parents and students in a parent-student handbook, which will include a page in which parents acknowledge receipt of the handbook. Promotion and graduation criteria will also be posted publicly on the school's website and conveyed by other means of communication such as newsletters, school open houses, and meetings with parents.

#### School Calendar and Schedule

Please see Attachment 13 for our 2017-2018 calendar and schedules.

#### School Culture

1. Describe the Culture. A positive school culture functions to sharpen the focus of staff and students, build commitment and a sense of community, foster motivation, and encourage productivity and learning. RP:CFA is dedicated to promoting a positive academic environment through the idea of developing the next generation of productive citizens. We feel that it is our duty to instill in our students the character traits that will assist them in reaching these goals. Students will learn and internalize that their destiny is not defined by their demographics, but by how diligently they work towards their goals.
2. Implementing School Culture from Day One. With that cultural philosophy in mind, RP:CFA is dedicated to growing and fostering a positive school culture from day one. The school will work collaboratively with all stakeholders, staff, students, parents and community members to promote the focused vision and mission of the school.

We will clearly communicate defined expectations to promote our school culture as well as teach and model the behaviors associated with it. This will begin in pre-service with our teachers where we will discuss our core norms, values and beliefs. Our norms, values and beliefs will forge strong positive interpersonal relationships between staff, students and parents and as well within each of those groups. We will clearly define a specific standard of respect, caring, concern and support that will be a hallmark for our school. Students will learn these standards and they will be reinforced daily through observation of the way teachers treat each other and their students. Students will consistently see behavioral expectations being modeled by their teachers and administrators. Staff pre-service and on-boarding will include developing a common language of expectations. Professional development will also be provided to ensure that teachers and staff are equipped to use effective classroom management techniques and a school-wide positive behavioral support system that supports a positive and safe learning environment.

In conjunction with our defined academic and social expectations which will be clearly communicated with all stakeholders, a shared sense of community will be the cornerstone of our success. Continual and fluid communications between staff, students and parents will begin at enrollment and continue throughout the school year. All parties will not only feel, but know that they are essential to student success.

Creating a positive school culture and academic learning environment relies on community support, which is why we have created our Advisory Council. Our Advisory Council will continue to be an important link to the community as we establish our schools. The school will continue to be in tune with the community's unique needs and will work with the Advisory Council to assure that we are doing what is best for the students, parents and community that each school serves.

3. and 4.

<b>A Typical Day in the Life of a 2nd Grade Student at a Challenge Foundation Academy</b>	<b>A Typical Day in the Life of a 2nd Grade Teacher at a Challenge Foundation Academy</b>
<b>Before School</b>	
I arrive at school at 7:30am. I get off the bus and I am greeted by the school director. I know that I have to go straight to the cafeteria to get	I arrive at school at 7:00am. I do not have breakfast duty this week, so I am able to go straight to my classroom to prepare for today's lessons. We are

<p>breakfast. I know exactly where to sit, because my teacher showed me on the first day. I sit in that seat everyday because after I finish breakfast, I check my folder in my pocket on the back of my chair to see what my teacher has left me to practice on. Today there is a note to go to the computer lab. I know when it is my class's turn to go to the lab before school that I go in and find the computer that is logged in with my name on the screen. It is set to my CompassLearning account and the note from my teacher said that I needed to work in my numbers and operations folder. The lessons on there are created just for me. If I have any questions, the teacher in the lab is there to help. I work on the lessons on the computer until the bell rings and then I go to my classroom.</p>	<p>studying Ancient Greece and there are some great resources that I found on the <a href="http://teamcfareources.org">teamcfareources.org</a> website which I used to create a pear deck presentation to share with the class today. I also make sure that I have the materials for my anchor activity in our math lesson today. I also have a couple of new mental math problems about Ancient Greece to try out on the students while they wait in line at lunch. Today my class is able to go to the computer lab before school. I will run a report on CompassLearning at the end of the week to make sure that they all stayed on the tasks they were assigned. The bell rings and I know my students are going to be here any second.</p>
<p><b>7:50-10:50am</b></p>	
<p>I get to my classroom and my teacher greets me. I put my things in my cubby, take my homework out of my homework folder and put it in the basket on my teacher's desk. I go to my table and make sure that I have a sharp pencil. I know that it is important to be prepared. I look at the board and read that today we are going to still be learning about Ancient Greece. I go and sit down on the carpet in front of the of the board. The bell rings and then one of my 3rd grade friends says the Pledge of Allegiance on the intercom. I remember in kindergarten that we studied American Symbols so I know what our flag means to us and our country. We then have a quick morning meeting where my teacher goes over what we are going to be learning today.</p> <p>My teacher shows us a cool presentation on the Mimeo Board and we get to go up and interact with it. Sometimes we answer questions on there, sometimes we work with maps and sometimes we even make graphs on the board. I think technology is cool and it is exciting when we get to use it.</p>	<p>My students begin to arrive in the classroom. They know that when they come in they are to put their backpack away, put their homework in the basket, make sure that they have a sharp pencil at their table and go and sit on the carpet.</p> <p>We go through our morning routine: the Pledge of Allegiance, attendance and our Morning Meeting where I explain what we will be learning today.</p> <p>We then go through the Pear Deck presentation. I have all of the pictures in there from the CKLA flip book for today's lesson. I also have vocabulary for today's lesson. We are studying the Olympics in Ancient Greece. This is a 2 day lesson in CKLA. The students interact with the presentation. They know the type of behavior I expect when they are at whole group time. I always keep my classroom management strategies that I learned at our pre-service training on Fred Jones in the back of my mind so I can implement them quickly and effectively.</p> <p>I then go through the rest of our Listening and Learning lesson for the day. I use effective questioning strategies so that I can make sure that I</p>



<p>Then my teacher reads us a story about the Olympics in Ancient Greece. She asks us a lot of questions. Because I was paying attention, I raised my hand and was able to answer the question when my teacher called on me which made me proud of myself.</p> <p>It is then Break Time. We have a snack and watch a video where we get up and dance. It is about the life cycle of a plant. We are learning about life cycles in Science.</p> <p>Then we do some writing. I am writing about two men named Myron and Pindor that we learned about. I have to make sure everything is spelled correctly and that my sentences are not too short.</p> <p>It is then my turn for reading. I am working on reading a book called <u>Bedtime Stories</u>. Some of the words are hard for me, but my teacher tells me to remember my sound tricks and then I can read the words to her. We talk about the things that happened in the story that I just read to her. I remember almost everything, and my friends help me with what I did not.</p>	<p>am teaching, not affirming or giving students answers.</p> <p>After Listening and Learning, my students take a break. I like to have them get up and move during this time to help them refocus.</p> <p>It is then time for our Skills part of our literacy block. I have the students writing a story because one our standards for this domain is re-telling of a fictional story. While the students are working on this, I am able to pull others in small groups for reading. I have them grouped according to their NWEA MAP scores in reading in the goal performance area of literature, since our story is fictional. <u>Bedtime Stories</u> is the reader from this unit in the skills section CKLA. I have students on many different ability levels, but I have so many resources that I can draw on to help differentiate.</p>
<p><b>Lunch</b></p>	
<p>It is time for lunch, so I line up with my friends and my teacher walks us down to the cafeteria. While we walk the teacher is asking us the math problems that we can answer, it usually goes down the line, but sometimes we all answer together. We wait quietly in line for our food. It is hard to not talk to my friends, but I know what is expected of me and I know that we can talk at our tables quietly. It is raining so after lunch we go into the gym and play. My teacher has the soccer balls out, so my friends and I play together.</p>	<p>I have lunch duty this week, so I stay with my students and because it is raining, I take them into the gym to play soccer. I use this time to talk about teamwork and the importance of “playing fair” and following the rules. Most of the students understand the expectations that I have set about teamwork, but a few still need reminders. When I don’t have duty, I return to my room to grab my lunch. Typically I am sitting with my team in the staff break room in order to use the microwave and we get a chance to visit. I enjoy this because I get so many great ideas from them.</p>
<p><b>Specials Class</b></p>	
<p>Today we have Art for Specials class. We are working with clay to make a Grecian Urn. Last</p>	<p>Today my students are at Art, sometimes they are at other specials. Typically this is my prep period</p>

<p>week we made the urn and now the clay is dry. Today we are painting the people on the urn. We learned in class that an urn is like a vase. The pictures in it told a story. My urn is going to tell the story of Hermes. We read a story about him in class last week.</p>	<p>where I work on planning and preparing lessons. Sometimes in team groups and sometimes on my own. However, today is the day for my bi-weekly data meeting. We have just finished our Winter NWEA MAP testing and my school director and I are meeting to go over the action plan I wrote during our last professional development day when the TeamCFA data coordinator came in to go over our scores with us. The school director asked me some tough questions about my action plan. My goals are ambitious, but I know that my students will rise to the challenge.</p>
<p><b>12:15-3:00pm</b></p>	
<p>When we get back from Art is time for math. In math today, my teacher starts out the lesson by giving us a problem. She is wanting to plant a class garden with us. We have 12 seeds and she wants to know how many ways we can make even rows. She gives each table 12 seeds and we try to see how many different ways we can make even rows. I am the group recorder today. After we talk about our ideas as a class we get to work on today's math lesson. If I have trouble, I know I can ask my shoulder partner, then ask a table friend and finally if no one knows the answer, I can ask the teacher. It is fun to be a problem solver.</p> <p>It is time then for centers. Today I start at the Chromebook table. I am making a Powtoon of the Greek Myth of Zeus.</p> <p>I then go to the science center and work on my life cycle of a plant activity. I know a life cycle is like a wheel that goes around and around, so my plant life cycle needs to look like a wheel and it needs to go in order. I can't put a full grown plant on the wheel before I put the seed.</p> <p>The math center is my last stop of the day. We are doing addition practice and I use the counters to help me. Today the counters are seeds. I like when my teacher uses cool things for counters and not boring blocks all the time. Some of friends do not need to use</p>	<p>In math today we are working on numbers sense. I begin with my anchor task with the whole class and then move on to the guided and then independent practice. I have taught my students how this process works at their tables and how to ask for help when they really need it. They are becoming more independent and better problem solvers.</p> <p>It is then time for centers. This is also the time that I can pull students into small groups as needed. I do not work with every student every day in the afternoon, just those that are struggling with certain skills. Even my more advanced students need work in certain skill areas so during a given week, I will see every student at least twice a week in our afternoon study block.</p>

counters, but sometimes I get stuck and need help.	
<b>Afterschool</b>	
School is almost over so my teacher has us pack up to go home. Then I wait quietly for my bus number to be called. When I hear mine, I say goodbye to my friends and teacher and walk to the bus. I had a busy day and learned some new things. I can't wait to see what we will learn about tomorrow.	My students pack up and wait quietly for dismissal. Some of my students go to aftercare in the cafeteria and some wait for their bus number to be called. I say goodbye to all my students and tell them I will see them tomorrow. I then take the next hour preparing for tomorrow's lessons, making sure I have all of the materials, the technology that I am going to use is working correctly and I have the list of students I want to work with in the afternoon study block tomorrow and what skills we are going to be working on.

**Supplemental Programming**

1. Summer School. At present, RP:CFA does not plan to offer a summer school program. All board members are well aware many students in our target area may enter the school below grade level, as represented in data gleaned from local school reports. After the required Indiana state tests are completed, our leadership group will study those results to determine if a targeted group of students needs assistance outside of the regular school year to allow them to achieve grade level status.

If a summer school program is determined to be needed for a targeted number of students, the program will be offered to the students and their families on a volunteer basis. The program will be offered Monday through Thursday from 9 am until 1 pm. A light snack and transportation would be included and the program would be paid for with funds allocated by TeamCFA as a grant. This summer school program was offered to Indianapolis Academy of Excellence by TeamCFA during the summer of 2015.

2. Extra- or Co-Curricular Activities. Extra- and Co-Curricular activities will be developed in cooperation with the School Board to meet the needs of the families the school serves. Partnerships with the Boys & Girls Club and Salvation Army are currently being explored. The school will explore 21<sup>st</sup> Century Grant partnerships to fund these programs.
3. Strategies to address student mental, emotional and social development and health. The mental, emotional and social development and health of our students will be a top priority as reflected in our administrative plan that includes a Social Worker (SW). Our SW will be heavily involved with our students in all grade levels. He/she will conduct group lessons on character, character building, proper interaction between students, hygiene, and age appropriate ways to deal with conflict. The SW will also be involved in all aspects of the student code of conduct and discipline issues. Any time a young person must interact with or be disciplined there are two factors at play, the emotions of the student and the underlying reason for the action that caused the event. A SW will work with the student immediately after any discipline incident that requires a student to be interviewed by any

administrator. The classroom teacher will also have the option of including the SW in a discussion with the student or sending a request to the SW to conduct an interview with any student in his/her classroom. The SW will also create a great working relationship with our supporters wrap around service providers.

4. All plans have been described in the discussion above.

### Special Education and At-Risk Students

1. Summary. While RP:CFA will work diligently to address the needs of all students within the regular classroom, we recognize the varying speeds at which children learn and the varying levels of support students need. RP:CFA will hold all students to high academic expectations and understands the process for reaching those expectations may be different for some students compared to the majority of the student population. Fully enrolled, we expect to have class sizes of approximately 25 students per class in grades K-5 and slightly larger in grades 6-8. We plan to allocate funds to employ instructional assistants in the lower elementary grades, K-2. Our instructional assistants are specifically responsible for providing extra literacy and math support to students with special needs through small group instruction. RP:CFA will provide additional support to all students, including students with special needs, through an established Response to Intervention (RTI) process. Students with special needs may receive services at any tier of the RTI process, but it is anticipated that many students with special needs will be in need of Tier 3 supports. The RTI process, as it pertains to both general education students and students with special needs, is further described in response number 4 below. We will charge our instructional assistants with providing Tier II support for students who need extra assistance in the classroom (push-in) and outside the classroom (pull-out). On the whole, with the intention of appropriately challenging all children to reach their maximum potential, our instructional assistants spend 80% of their time supporting students not yet performing at grade level and 20% of their time providing extra enrichment to students performing significantly above grade level. For students in Tier III and IV, as designated by RTI, certified special education staff will be utilized to provide services as needed by each individual student, as outlined in their Individualized Education Program (IEP). Students with Section 504 plans and English Language Learners enrolled in the school will be served utilizing instructional assistants and fully trained staff on our campus. Our staff will be trained to meet the needs of all students, including those with 504s, IEPs, and ILLPs. We will conduct all Child Find activities and anticipate having to pre-screen, or designate students who are new to the system, as well as following the guidelines set forth in existing plans for older, incoming students. All programs and services will meet or exceed the guidelines set forth by IDEA, Article 7, and Title III, as appropriate.
2. Each school will identify and meet the learning needs of students with mild, moderate, and severe disabilities in the least restrictive environment possible using the programs, strategies and supports described below:
  - a. Student Identification. RP:CFA will make every effort possible to obtain students' previous school records for all students who have previously attended another school within a reasonable timeframe to identify all students who have been identified for receiving special education services. Additionally, every student will be given an NWEA pre-screening diagnostic test during the first two weeks he/she enters school. The assessment will allow the staff to identify students who are significantly below grade level. In addition, each new or incoming student will be assessed through a universal 45 day screening form that identifies behaviors, health, emotional or academic concerns noted by the staff. School staff will be trained to identify students with special needs. Information from the NWEA, universal screening, and

classroom performance and behavior data may signal to school staff that a student should receive Tier 2 or Tier 3 support. In such instances, a Child Study Team will meet as a group and with the parent to discuss the child's progress. During this process the Child Study Team will meet weekly to evaluate the standard accommodations or modifications given by the general education teacher to meet the needs of the student. After a 3-5 week period of time, the Child Study Team will determine if the general accommodations or modifications are allowing the student to be academically successful. If a student continues to not meet expectations, it may be a sign of a larger issue and school staff will work to address it quickly. If that is the case, school staff will reconvene with the student's parent to discuss if there is a need for further evaluation. Upon parental written consent to conduct the evaluation, a multidisciplinary team of school staff (which may include a general education teacher, a special education teacher, and other qualified professionals based on the student's needs or suspected disability), will conduct an evaluation. The team will provide its evaluation report to the Case Conference Committee (CCC). The CCC convenes to review the evaluation report and determine a student's eligibility for special education and any related services. The CCC will review the student's performance level(s) and any progress monitoring that is available to develop the student's IEP. Furthermore, the CCC will review (and revise, as appropriate) the IEPs and Section 504 plans of all students who have previously been identified for special education services to determine which services can reasonably be provided using school resources and which resources will need to be provided through contracted services, if necessary.

- b. Specific, evidence-based instructional programs, practices, and strategies the school will employ to provide a continuum of services. RP:CFA will utilize a Core Knowledge literacy program that has both a foundational skills and reading program. The school will use Singapore Math for the math curriculum. Both programs are grounded in evidence that shows success for students at all levels of achievement, including students with special needs. These programs also provide Assessment and Remediation guides that will help staff to meet the accommodations and modifications needed by the students. Special education staff and general education staff will work together to provide the accommodations and modifications to the instructional programs that will allow the student to be successful with the general education curriculum. When established, the IEP goals will utilize benchmark assessments in both of these curriculum programs. In addition, the students will be utilizing a Compass Learning computer program that will be individually leveled to meet the student's needs. Every reasonable effort will be made to provide instruction and educational services to students in the least restrictive environment, however both the instructional staff and the special education staff will utilize pull-out services to fill gaps as necessary, or provide more detailed modifications to the general education curriculum so that the student is successful.
- c. Evaluation and monitoring of program success. Students will be monitored on progress towards their IEP goals based on formative classroom performance and quarterly benchmarking with NWEA assessment tracking. On a quarterly basis, the student's team will evaluate the quality of services being provided, the student's progress towards the identified year-end goals in the IEP, and any necessary changes that need to be made in order to ensure the student is showing adequate progress. Speech or Occupational Therapy providers will work directly with our special education staff, and the student's general education teacher to monitor progress through formative data, and quarterly benchmarks as set forth by the servicing therapist.
- d. The school will not serve high school students. This section does not apply.
- e. Provision of qualified staff for students with special education needs. To meet both the administrative and service needs associated with special education, the school will hire and/or contract a fully staffed special education team that is appropriately licensed to include all

disability areas as needed. The faculty will be effectively trained and knowledgeable about servicing students with IEPs. Under the oversight of our Special Education Director, our faculty will work with each student's family to update the IEP at least once annually and more often, as needed, at the request of the school and/or parent. The child's special education teacher (or intervention specialist), his/her classroom teacher, a parent and an administrator (usually the Special Education Director) will be expected to attend all case conferences. Our Special Education Director will form a team that will follow checklists of specifications of (special education laws) IAC 511, Article 7, and the Federal IDEA, ADA 1990 and Part 504 of the Rehabilitation Act of 1973, to ensure we are in full compliance with each. We will comply with all applicable state and federal statutes and regulations related to providing services to students with disabilities. Our Special Education Director will assume responsibility for state and other reporting requirements at our school.

- f. Examples of implementation. RP:CFA intends to contract with the Indiana Network of Independent Schools (INISchools) regarding special education management services. INISchools is currently providing similar services to schools across Indiana, including Indianapolis Academy of Excellence (IAE), an existing TeamCFA school. Specifically, INISchools provides a number of special education services, including special education file setup and maintenance, compliance monitoring, speech and language services and other therapies, and professional development. IAE staff participate in monthly professional development with a network of teachers across a number of schools, covering a variety of topics which include adjusting course scope and sequence, daily schedule, staffing plans, instructional best practices and compliance training and support. On a weekly basis, IAE also receives direct administrative and management support and as a direct result from this support, IAE has changed the way it is implementing school-wide behavior supports and remediation, particularly for students with special needs.
3. RP:CFA will meet the needs of English Language Learners (ELL). ELLs will be served at the school using Individual Learning Plans (ILPs) in accordance to Indiana State Law. An English Language (EL) designee will monitor the program.
    - a. Identification of students. RP:CFA will make every effort possible to obtain students' previous school records for all students who have previously attended another school within a reasonable timeframe to identify all students who have been previously identified as ELLs. ELLs will further be identified initially through the completion of the Home Language Survey given to parents and guardians in the school's enrollment packet. The survey will identify those students who need to be tested. Qualified staff will administer the W-APT tests within 30 calendar days to these students. Qualifying students will be designated ELL and an ILP will be written by our teachers in conjunction with our trained EL designee.
    - b. Specific instructional programs, practices and strategies employed to ensure success and equitable access. Students with ILPs will receive additional support from the instructional assistants and Reading and Math Interventionists. The support and general education teachers will utilize accommodations and modifications listed in the ILP. Math and Reading Interventionists and Instructional Assistants will provide pull out assistance for students in the specific domains of speaking, listening, reading and writing as needed by the individual. All staff will receive training and support, on the effective practices utilized with secondary language learners for implementation in the classroom.
    - c. Assessment and monitoring of progress and success. Students with ILPs will have their progress assessed quarterly using NWEA benchmark data and formative classroom data to determine adequate success. Annually, the English proficiency exam, WIDA ACCESS, will be administered to students to determine continued placement or exit from the program.

- d. Provision of qualified staff. The EL designee may be a current staff member that receives additional training or it may be a contracted service, depending on the number of ELL students in the school's population. The EL designee will be responsible for supporting the classroom teacher in meeting the needs of the ELL students. In addition, this designee will create the agenda and outline for use during the quarterly meetings that evaluate adequate student progress.
4. Meeting the learning needs of students who are performing below grade level and monitor their progress. Our goal is for all students to be proficient and master the skills outlined in our Core Knowledge curriculum as well as the Indiana Academic Standards set forth by the State Board of Education. All students will be monitored and goals for each student will be modified as they progress towards skill mastery and grade level proficiency. Serving students below grade level will be accomplished via the RTI plan (outlined below). Students will be identified through the NWEA benchmark assessment at the beginning of the year as well as formative data collected by the teacher. The school will use a four-tiered approach to RTI.

#### ***Tier 1***

Tier 1 includes classroom supports that benefit the growth and development of all students. Teachers may adjust or tweak these supports to address the academic and behavioral needs of specific students or groups of students, yet they occur within regular classroom level systems and supports for young learners. They include but are not limited to small group instruction, support through the Compass Learning Program, additional support with parents, and before or after school tutoring.

#### ***Tier 2***

Tier 2 includes special supports and interventions designed to address the specific needs of a subset of students identified through our universal screeners. These students are generally below grade level or they have distinct behavior needs. In addition to supports identified in the Tier 1 group, these students may be pulled out by the instructional assistants or Reading and Math Interventionists to provide individualized instruction.

#### ***Tier 3***

Tier 3 includes individualized supports and interventions designed to address the specific needs of students in a special setting. Tier 3 students are significantly behind, or they have distinct behavior needs. Along with Tier 2 supports, Tier 3 students receive individualized assistance in class as well as outside core academic time from specialized staff. They may be designated special education, or have a disability.

#### ***Tier 4***

A Tier 4 student has not responded sufficiently to Tier 3 interventions or has been diagnosed with a disability. Most Tier 4 students have IEPs with specific learning and behavioral goals. Our special education teachers provide individualized instruction in small groups and work closely with classroom teachers to modify or tailor curriculum to meet the needs of each Tier 4 learner.

5. Intellectually gifted students. Students will be initially identified as intellectually gifted through their NWEA MAP assessment scores. Any student with a score that is in the 95th percentile or above will be given the Cognitive Abilities Test to obtain further data. Other mental ability tests may be used to create a portfolio for the student.

- a. Students who are designated as intellectually gifted will receive small group instruction by the instructional assistant or teacher with developmentally appropriate material. Gifted students will utilize the advanced curriculum within Core Knowledge and Singapore Math to keep them engaged and growing academically. This includes inquiry projects and other activities that develop a deeper understanding of the Core Knowledge Domains and Math concepts. In some cases the student may join classes above their current grade level for specific subjects or utilize programs such as Compass Learning to drive student growth above their current level.
- b. Instructional assistants will be trained on the Core Knowledge curriculum as well as how to develop an inquiry based approach to the material. The staff will work closely with the teachers to develop accommodations and modifications that continue to challenge the student.
- c. NWEA quarterly benchmarks as well as formative classroom level data, will be used to determine if the student is making adequate progress.

### Student Recruitment and Enrollment

1. While RP:CFA is open to any eligible student in the state of Indiana, the school will develop strategies to attract kindergarten through second grade students residing in targeted communities. Implementing a slow growth model at the primary grades is most appropriate for ensuring a strong foundation and beginning to developing a culture of learning and family engagement. Past experience has shown that families with young children are seeking a better opportunity for their students than that provided at their traditional neighborhood school.

We are implementing a three-stage recruiting and marketing plan. In the first stage, School Board members and TeamCFA staff met with community leaders to share the mission of TeamCFA, gain information, insight, and history on the community to ensure our targeted population was correctly identified, and establish initial community partnerships.

The second stage of recruitment and enrollment will take place immediately following charter approval and consists of direct communication with the targeted student population. This communication will occur through several mediums including newspaper advertisements, the construction and launch of a website in collaboration with TeamCFA, advertising, convening informative open house meetings, door-to-door canvassing, and other strategies. TeamCFA has developed customizable brochures for Network schools to use that include an overview of our schools' academic programs to be handed out at meetings and posted in common locations where people will have an opportunity to become aware of the school. These meetings will occur within the targeted neighborhoods and will be led by the School Board members and the school director in conjunction with community partners established through stage one and TeamCFA staff.

In the third stage of recruitment and enrollment, RP:CFA school will gather and inform prospective families of the enrollment process and hold informational meetings about the school and its campus. Details about the school, its functions, and critical information within the student handbook will be provided during this stage. Actual enrollment for the first year is included within this stage.

2. The school's enrollment policy is included as Attachment 14.

### Student Discipline

1. In order for teachers to teach and students to learn, a positive, safe and secure learning environment must be consistently maintained. Accordingly, the teacher, as the recognized authority



in the classroom, serves as the role model to set the expectations for student behavior. Discipline is defined as well-ordered, directed behavior. Parents, guardians, students, teachers, School Director, administrative and support personnel, and the School Board share responsibilities in the positive development and maintenance of disciplined behavior. The school’s discipline policy is based on the belief that every student has a right to an environment that encourages learning and is free of disruption. The developed policy provides guidelines on behavior and school citizenship for students. The following broad categories related to student conduct are included:

- Basic Rights and Responsibilities
- The Student Code of Conduct
- Due Process Procedures and Rights of Appeal

The rules of conduct and sanctions for violations detailed in the policy are part of the continuing responsibility to monitor student behavior. The explanations of violations and the definition of terms have been expanded to assist students in understanding the expected behaviors.

A set of rules does not replace the administrator’s judgment in the review of discipline incidents. The levels indicated for school-initiated consequences are a guide for the administrator, but the levels may be increased or lessened if, in the view of the administrator, the situation calls for that judgment. (Violations of the laws of Indiana will be handled pursuant to normal arrest procedures and are not within the administrator’s jurisdiction.) The administration has the authority to use administrative discretion in dealing with these matters to ensure the safety and well being of our students. In order for the school to be safe and orderly places for learning, rules must be obeyed. These rules are written to give direction. However, in daily activity, one basic rule is that good sound judgment must be exercised in consideration of conditions of the moment.

Furthermore, it is recognized that students need to be active participants in maintaining a safe and orderly school environment. To promote the active involvement and self-discipline of students, school staff members must remember that students need to feel respected and valued. Opportunities to learn from mistakes create a context for students to learn to make good choices in the future. Ultimately, the goal is for students to do the right thing, even when nobody is looking.

2. Please see Attachment 15 for the complete school discipline policies.

**Parents and Community**

1. Other school options in the targeted location.

Name	Type	Grades Served	Enrollment (SY2015-2016)	School Grade (SY2013-2014)
Andrew J. Brown Academy	Charter	K-8	641	F
Francis Scott Key School 103	Traditional (IPS-Phalen compact)	K-5	383	F
Charles W Fairbanks School 105	Traditional (IPS)	K-6	407	C
Sunny Heights	Traditional (Warren)	K-4	478	D

Elementary School	Twp)			
George S Buck School 94	Traditional (IPS)	K-6	389	D
George H Fisher School 93	Traditional (IPS)	K-6	395	F
Winding Ridge Elementary School	Traditional (Lawrence Township)	1-6	625	C

2. In an effort to address the demands of the communities as well as the general need for quality schools, TeamCFA began exploring locations for additional Challenge Foundation Academy schools in early 2014. TeamCFA has reviewed maps of district, charter, and private schools across Indiana. After careful study and consultation, the Far Eastside of Indianapolis was selected as an area in which there is not yet a sufficient supply of high quality education seats. The target location of Rosa Parks: A Challenge Foundation Academy is between 44<sup>th</sup> & 30<sup>th</sup> and Mitthoeffer & Franklin.

RP: CFA will emphasize the value of family engagement as a foundation for student academic achievement as well as for the overall sustainability that families bring to a school culture and community. RP:CFA will implement systems to create mutual trust and respect and will provide opportunities for collaboration. Community outreach is imperative to success. RP:CFA will access additional community resources to foster a one-of-a-kind neighborhood school that encourages community and connected learning. RP:CFA will foster learning opportunities for students and their families not only during the regular school day, but during non-formal school times as well. Utilizing the talents of the school’s social worker and partnering with social services, community programs and faith based organizations in the area, RP:CFA is prepared to be a primary partner in fostering change in the community.

3. Although volunteer time will not be required from parents, it will be strongly encouraged. A variety of activities will be planned for parent and family involvement in RP:CFA. These activities include, but are not limited to:
- Strong family-school partnerships will be built through family members’ regular involvement with the school through the life coaching activities, which will help students’ address any family concerns, strengthen family relationships, and identify resources for family members in need of services;
  - Volunteer opportunities for parents to participate in school activities (i.e. field trips, community service activities);
  - Parents can help with various administrative activities including assisting with developing school marketing material (e.g. internal newsletter, flyers);
  - Family resource days at the school will be held at the beginning of each school year (invite local social service providers)
4. RP:CFA has opened a dialogue with a variety of organizations to explore possible partnerships. These include, but are not limited to, the Boys & Girls Club, C.A.F.E., La Plaza and neighborhood churches.

- Community engagement was the first step in the development of RP:CFA. TeamCFA representatives began meeting with community members in July 2015 to develop relationships and identify neighborhoods of need. Once it became clear that the Far Eastside should be the target location, more focused community engagement occurred. (See Community Engagement Summary included in Attachment 16) RP:CFA will continue to work with identified partners and establish additional relationships. The School Director, as part of the leadership training provided by TeamCFA (See Attachment 2) will create effective communication strategies for working with parents and community partners, beginning in August. Documentation of community engagement and community support are included in Attachment 16.

**Performance Management**

- In addition to the academic performance goals set by the ICSB, RP:CFA has established two goals students at the school will be expected to achieve. These goals and corresponding metrics, below, outline expected student achievement goals by the end of RP:CFA’s first 5-year charter term. In order to appropriately measure progress towards these goals, RP:CFA will set annual targets after baseline data are established during the school’s first year of operation. Targets will be designed to build over time, as the school’s population grows and matures. It is anticipated that the longer a student is enrolled in the school, the greater impact RP:CFA will have on students and their academic achievement.

<b>1. Students will achieve annual individual growth goals in reading as measured by NWEA-MAP on an annual basis.</b>	
Exceeds Standard	90-100% of students meet individual growth goals
Meets Standard	75-89.9% of students meet individual growth goals
Improvement Necessary	60-74.9% of students meet individual growth goals
Does Not Meet Standard	<60% of students meet individual growth goals

<b>2. Students will achieve annual individual growth goals in mathematics as measured by NWEA-MAP on an annual basis.</b>	
Exceeds Standard	90-100% of students meet individual growth goals
Meets Standard	75-89.9% of students meet individual growth goals
Improvement Necessary	60-74.9% of students meet individual growth goals
Does Not Meet Standard	<60% of students meet individual growth goals

These goals are aligned to RP:CFA’s mission to provide a robust, challenging and supportive academic environment that is accessible to all students while encouraging and enhancing common values and ideals in a community setting. The school intends to develop lifelong learners who will be successful while enrolled at RP:CFA, high school, and beyond. These goals will allow school staff to not only track student progress, but provide a comparison to how students are performing across the country.

The Board of Directors, at any time, may elect to establish additional goals to evaluate the school’s progress and successful execution of its mission.

- Primary Interim Assessments. RP:CFA will utilize NWEA MAP to set goals for student growth and proficiency. NWEA MAP tests assess proficiency and growth of students in specific goal performance areas of reading, math, language arts and science. We will focus on the goal

performance areas of reading and math in particular, looking for student growth as well as student proficiency. Student growth is defined as one grade level growth from fall to spring. However, in many cases, and especially with the target demographics at the school, we would expect more than one year's growth for all students initially and for transfer students who enroll performing below grade level. Student proficiency is aligned with mastery of grade level skills.

3. Collection, Analysis, Use and Reporting of Data. We will use school-wide assessments throughout the school year to ensure we are addressing all students' learning needs. We will assess all students within the first two weeks of school. The NWEA MAP will offer baseline measures for student growth and proficiency. We will then use the data from these assessments to place students into instructional learning groups based on skill strengths and deficits. In addition, we will use state testing data from the previous year to reevaluate curriculum tools and planning maps.

While we understand the importance of school-wide assessment tools, we also are cognizant of the importance of daily classroom performance. Teachers will develop interim assessments to be given throughout the school year. It is vital that teachers be empowered to develop these interim assessments so they more accurately evaluate the skills being taught. Results of these assessments will be shared with the school director at data meetings.

All school-wide data, including state assessment data, will be collected and analyzed by the school's data team which consists of a grade level leader from each grade level and the school director. TeamCFA's School Support Team will assist with the analysis of both school-wide and individual teacher data, including analysis to determine the specific areas of growth needed for each student, if a standard needs to be retaught, or if any specific students need additional interventions through pullout. The data will also drive the grouping and planning for small group instruction. Data meetings will be held every month between the director and teachers. These data meetings may be school-wide, grade level or with individual teachers. Achievement data will be available for all stakeholders and will be posted on the school's website.

4. Information System. The School Board and School Director will select a student information system (SIS) vendor during the school's pre-opening period. School staff will use the SIS to collect student data and perform mandatory state reporting for the school. The SIS will be managed on a day-to-day basis by the school director. Data entry is the responsibility of all school staff members. For example, teachers will record attendance and grades and the Dean of Students will record student discipline incidents. With support from INIschools' experienced state reporting and compliance staff, the School Director will review the data entered by the school staff and is responsible for gathering and compiling the data and submitting it to the IDOE. RP:CFA will adhere to all deadlines for data report submissions. Internally developed tools and spreadsheets will be used school-wide to track standardized data and measure growth on NWEA and other standards-based assessments.

The School Director, data team, and TeamCFA's data analyst will interpret assessment data. TeamCFA support staff will train RP:CFA staff so they can fully understand data and utilize it to its greatest capacity. This training will take place throughout the school year.

5. Training and Support. For student performance data training and support, all staff will receive ongoing professional development in NWEA MAP assessments. Professional development will be offered to staff members three times a year. These professional development sessions will include, but not be limited to, how to interpret school, classroom and student data, gap analysis, student

growth versus proficiency, and goal-setting and action plans. Staff will also be given instruction on how to utilize CompassLearning, a software program that allows students' NWEA MAP scores to be used to create individualized learning paths targeting student deficiencies and promoting student growth and proficiency in math and reading.

6. **Corrective Action Plans.** In the event that the school does not meet the expected levels of academic achievement established by the ICSB and the Indiana Department of Education, the school administration and the TeamCFA School Support Team would meet to conduct extensive data analysis and to determine the exact areas of concern.

A corrective action plan would then be developed and presented to the School Board. This plan would include specific interventions to address the areas of weakness as well as how the steps would be monitored and benchmarks established at regular intervals of not longer than once a month to measure the success of the interventions. This corrective action model could be triggered by one of several events: (1) if the school were to be rated as a "D" school or lower at any point, (2) if the school were to be rated at less than a "B" by its third year of operation, (3) if 80% of all students did not make a minimum of one year's academic growth as identified by the NWEA MAP scores, or (4) if the projected growth of students did not indicate that all students were on pace to be proficient on the state assessment before the final year at the school.

It would be the responsibility of the school administration, with the support and guidance of the TeamCFA School Support Team, to implement the corrective action plan.

**Section III: Implementation Plan**  
**Human Capital**

**Network-wide Staffing**

	Year 1	Year 2	Year 3	Year 4	Year 5
Number of K-8 schools	12	15	18	21	24
Number of K-12 schools	4	4	4	4	4
Number of 7-12 schools	1	1	1	1	1
Total schools	17	20	23	26	29
Student enrollment	9055	10805	12605	14480	16555
<b>Management Organization Positions</b>					
Chief Operating Officer	1	1	1	1	1
Controller	1	1	1	1	1
Legal Counsel	1	1	1	1	1
State/Regional Director	3	3	3	4	4

Director: Leadership and School Support	1	1	1	1	1
Deputy Director for School Support	0	0	1	1	1
School Support Team	7	8	10	11	13
Technology Coordinator	1	1	1	1	1
Online Community Facilitator	1	1	1	1	1
Total Network FTEs	16	17	20	21	23

A table inclusive of school staff across the network was not provided. The growth and development of each established school is the responsibility of the school. TeamCFA support does not vary with the size of individual schools.

The following staffing is proposed for RP:CFA

	Year 1	Year 2	Year 3	Year 4	Year 5
School Director	1	1	1	1	1
Dean of Students	1	1	1	1	1
Social Worker	1	1	1	1	1
Administrative Assistant/Registrar	1	1	1	1	1
Classroom Teachers (grade level)	12	16	20	24	28
Classroom Teachers (specials)	2	2	2	2	2
Teaching Assistants/Paraprofessionals	8	9	9	9	9
Student Support (Special Needs)	3	3	3	3	3
Totals	29	34	38	42	46

### School Leadership & Staff Hiring, Management and Evaluation

1. Process and timeline for developing leaders. TeamCFA has created a leadership development program for schools that includes both training of new leaders and support for the leaders once the school is operational. Identification of the School Director begins with an interview process conducted by a group of professional educators who have extensive experience leading successful charter schools and who have a range of other experiences that make them qualified to evaluate potential leaders (business experience, professional development, data analysis, etc.) Once a potential School Director has been identified, he or she is admitted to the Leadership Development Program, a one year program that includes:

- An internship with a current TeamCFA school leader
- Training by TeamCFA staff in:

- ✓ Curriculum development and use
- ✓ Instructional best practices
- ✓ Data analysis
- ✓ Budgetary development
- ✓ Compliance with all state and federal requirements
- ✓ Working with the Governing Board
- ✓ Hiring and evaluation of staff
- ✓ Development and delivery of professional development
- ✓ Instructional coaching

During the internship, both the host school leader and the TeamCFA Director of Leadership Development and School Support evaluate the potential leader. Only leaders who successfully complete the program would be placed in the school. The length of the training is dependent on the prior relevant experience of the potential.

Leaders with exceptional qualities and/or experience may participate in the program for less than one year, but not less than 6 months prior to the new school opening. These candidates will be required to work with the TeamCFA trainers on a regular basis in specific training sessions prior to school opening. The candidate will also be required to work with the school board in developing effective community relations as well as all of the normal, required school pre-opening activities. All of these activities are subject to review by the School Board and the TeamCFA leadership development program.

Once the school has opened, TeamCFA will support the School Director, regardless of the length of time the candidate participated in the TeamCFA leadership development program. The leadership development program provides continuing professional development for all school leaders in the network at no cost to the school. Professional Leadership Trainers visit with the School Director on a regular basis to address issues that may arise and to support and train the leader in areas identified by the school leader, the TeamCFA Director of Leadership Development and School Support, or School Board.

2. **Strategy and Timeline for Recruiting and Hiring Teachers.** Within the TeamCFA network, each school director is responsible for staffing his or her school with highly effective teachers who are committed to meeting state standards and teaching the Core Knowledge Sequence in English language arts, history and geography, mathematics, science, art, and music. The School Director is expected to recruit potential teachers through online advertising on the school's website, through attendance at local educational job fairs, and through other means traditionally proven to attract high-quality teachers. In addition, the School Director will explore the possibility of partnering with local colleges, veterans' organizations, and organizations such as Indiana Teaching Fellows and Teach for America.

To assist the School Director in meeting this responsibility, TeamCFA offers regional and national support. The directors of TeamCFA schools in each region confer regularly and have the opportunity to share successful strategies for recruiting and retaining highly effective teachers. TeamCFA conducts national advertising campaigns through the career offices of colleges and through attendance at selected job fairs (such as state charter school associations) and makes the resumes available to all school directors.

Several times a year, TeamCFA places advertisements for teaching positions with various college career service networks, including the College Career Network, Handshake, and especially the NACELink/Symplicity network. In summer, the recruiting schedule is more frequent, and teaching positions were advertised on May 18, June 3, and July 29 with nearly 100 colleges and universities in the states in which TeamCFA operates and in neighboring states. Similar advertisements are scheduled for November, March, and May. In addition, TeamCFA plans to participate in the Hire Big 10 + Virtual Career Fair in April 2016.

National recruiting efforts that highlight the benefits of teaching at a TeamCFA school, including competitive salaries and benefits and the extensive professional development support provided by TeamCFA, make Network schools a competitive choice for teachers and administrators.

3. Staffing Plan. Because of the slow growth model implemented at the school, RP:CFA will not reach full capacity until its 7<sup>th</sup> year in operation. When fully developed, RP:CFA will serve up to 900 students in kindergarten through 8<sup>th</sup> grade. Staffing will look much different in the mature school than it will when it opens serving up to 300 students in kindergarten through second grade.

Initial staffing will include the administrative team as described in the School Leader and Leadership Team section of the application. Instructional staff will include the following:

- four classroom teachers at each grade level, one of whom will be designated as team lead
- eight parapro/instructional aides, one in each kindergarten class, two to be shared among the first grade teachers and two to be shared among the second grade teachers
- special education support staff as necessary.

Additional support staff will be contracted as required to meet student needs. Special education, janitorial support, bus drivers, and back office support for accounting, record keeping, and state reporting will also be contracted initially.

Teaching and support staff will be added each year as the school grows. While the class size will continue to require four teachers at each grade level, paraprofessional support will be reduced in the upper grades to shared positions within or among grade levels. Additional support staff such as Math and Reading Interventionists and an Instructional Coach will be incorporated as needed. When the school reaches the size and capacity to manage its own back office operations, the school will add the additional support staff.

The School Director will report directly to the School Board. All school staff will report directly to the School Director. The School Director will be responsible for classroom observations, both formal and informal, data review with all instructional staff, oversight and development of the instructional coach and content interventionists. The need for professional development, whether school wide or for individual teachers will be determined by the School Director with support from the TeamCFA mentor. The School Board may also request targeted professional development for the staff if they perceive a concern.

Technology is an important support for the instructional staff of a TeamCFA school. The instructor uses technology to enhance delivery of the lesson and to provide additional resources for students. Technology is also a vital tool for the classroom teacher in designing both differentiated lessons and remediation for individual students through the use of Compass Learning.



Technology is also used in gathering data on student progress through the NWEA assessment tool, which is done online and provides teachers with immediate information on student progress and areas of both strength and weakness, allowing teachers to focus instruction for both the class as a whole and individual students. Teachers and students are supported in this through the Instructional Coach and the Interventionists available on staff. The school administrator will also support these efforts through the monitoring process of classroom observations and data review with teachers.

4. School Leader and Teacher Evaluation. TeamCFA has developed a school leader evaluation tool to be adopted and used by the School Board. Used in an on-going manner throughout the course of each school year, this tool can be effective in identifying areas of concern that can then be addressed with the leader by the TeamCFA Leadership Development mentor at the request of either the school leader or the School Board. The School Board would continue to monitor the progress of the School Director and would be responsible for determining whether the School Director was making adequate progress. All contracts for a School Director will be reviewed at the end of each school year by the School Board to determine whether the School Director will be retained.

The School Board may also review the data from the NWEA and state assessments. TeamCFA provides School Boards with data experts to help them better understand the school data so they are empowered for data-based decision making. Data experts are available to the School Board following each of the NWEA assessments throughout the school year and at the end of the school year when the state level data becomes available to the school.

The key elements of the School Director's evaluation include the following:

- Student achievement, both on the NWEA and on state assessments along with any other assessment system the school chooses to use
- Budgetary effectiveness
  - Did the school stay within a fiscally sound and sustainable budget?
  - Were non-classroom expenditures reduced or maintained at an acceptably low level?
  - Did the budget reflect adequate resources for the instructional staff?
- Compliance
  - Was the school consistently compliant with all state requirements?
  - Was the school consistently compliant with all federal requirements?
  - Were all reports submitted accurately and in a timely manner?
- Student retention
  - Did the school enrollment reflect both maintaining students and new enrollments as projected?
- Oversight of staff
  - Were the required staff observations done with the necessary frequency and thoroughness expected and required?
  - Was professional development provided and effective?
  - When necessary, was staff management handled in a timely and professional manner?
- Governing board interactions
  - Was the board kept informed of the progress and challenges of the school?
  - Were reports provided to the board in a timely manner?
  - Was the school leader prepared for each board meeting?
  - Does the leader conduct himself in a professional manner?

The School Board may choose to add items to the Leadership Evaluation. For each item on the evaluation, the board is encouraged to provide evidence.

Evaluation of the instructional staff will be the responsibility of the School Director. Each teacher will have two formal observations per year: one each semester with a formal evaluation presented to the teacher following the evaluation. These evaluations will occur at the school leader's discretion and without prior notice. If direct instruction is not occurring, the evaluation will be conducted at a later time.

These formal evaluations will focus on the following:

- Effectiveness of the instructional practices presented by the teacher
- Level of student engagement
- Effective use of checks for understanding throughout the lesson
- Classroom management
- Effective and accurate use of the curriculum
- Differentiation of instruction

The School Director may choose to focus on several of the items based on the informal observations conducted previously and may choose to add items as necessary. In the course of the two formal observations, all of the foregoing items must be addressed.

Following the formal observation, the School Director will meet with the instructor within five school days to review the observation and present the written report. At that time, any improvement plans that need to be addressed will be presented. Improvement plans will have a monitoring schedule and timeline for completion as part of the plan. Accolades and commendations will also be noted and will be included as part of the instructor's personnel file.

Informal observations will occur for each instructor without prior notification. The School Director will conduct a minimum of five observations each week. The School Director will note what was observed during these informal observations and will share this information verbally with the teachers as necessary. Records will be kept of the observations, along with any concerns and commendations for reference by the school leader. The Director will focus on observing the best practices presented in professional development provided to the teachers along with level of student engagement and effective use of both time and resources by the teacher. The School Director may choose to include additional items within the observation. The observation may last as long as the school leader chooses but will be no less than ten minutes unless unusual circumstances interrupt the observation.

5. Unsatisfactory leadership or teacher performance. School leaders are trained by TeamCFA to observe and support teacher performance. The School Support Team also provides support for teachers professionally. The school will use data from a variety of sources to identify teacher performance including NWEA assessment results, state assessment results, teacher generated assessments and classroom observations by school administration.

When an issue is identified, the school administrative team, with the support of the TeamCFA School Support Team, will immediately create an improvement plan. This plan would include measurable, observable steps to address the identifiable issues with a specific time frame identified to resolve the concern. The teacher would be required to work with both the school administration and the

School Support Team. If the teacher is able to correct the concern, additional support will continue to ensure that changes remain in place. If the teacher is not able to correct the concern, the teacher's contract would be terminated and a replacement put into the classroom. The replacement would receive all the support necessary to make the transition as quickly and effectively as possible to minimize any negative impact on student learning.

School Leaders are trained and evaluated extensively prior to school opening in order to minimize the chances of unsatisfactory school leadership. If a concern were to develop with the School Director, the School Support Team, at the direction of the School Board, would develop a corrective action plan for that Director and begin working immediately with the leader to address the issue.

The School Board would be informed of the plan and the measurable steps that have been identified. The School Board would then monitor the progress or request that the School Support Team monitor the progress and report to the board at intervals of the School Board's choosing.

If the School Director does not meet the expectations set out by the School Board the Director would be placed on administrative leave until such time as the School Board determined a suitable replacement. An interim School Director would be established by the School Board and supported by the School Support Team. The support from the TeamCFA School Support Team would continue when a new Director was identified and installed by the School Board to ensure that the impact on students and student achievement was minimized.

6. Organization's Compensation System. RP:CFA's pay structure will begin with a base pay of \$40,000 for teachers. Salary adjustments will be made for teachers with three to five years' experience and a record of increasing student achievement. Each teacher will be eligible for an additional bonus pay depending on student growth measured by NWEA. Performance in previously defined rubrics will be used to determine the allotment each teacher will receive in salary. Benefits for teachers will include TRF or 403b participation, health insurance, dental insurance, vision insurance, and life insurance. We will adhere to all applicable laws and requirements regarding employee benefits according to the State of Indiana.

### Professional Development

1. School Leader Support. TeamCFA has recognized one of the most underserved areas of professional development is that of school leaders. In addition to the evaluation tool provided to the Governing Board of the school, each leader is mentored by the TeamCFA Director of Leadership Development and School Support.

This mentor works directly with the school leader on a monthly basis (more frequently at the request of the school leader or the Governing Board) at no cost to the school. The mentor provides professional development and guidance for the leader in areas identified by the school leader, mentor or Governing Board.

The relationship between the School Director and the mentor is one of support and professional development only. This relationship will continue for the first three years of the school leader being in place at the school. The relationship could continue beyond this time frame at the request of the school leader or Governing Board.

During this three-year time period, the mentor will meet with the School Director on a monthly

basis. During these meetings, specific areas of professional development will be presented, previous topics and professional development will be monitored for growth and implementation, and any concerns or situations will be reviewed. In addition to these visits, the mentor will be available by phone or email to address concerns and answer questions by the School Director. Additionally, the mentor will be available to help with the creation of professional development presentations to the staff, classroom observations, or working with other staff members to ensure that the school is providing the best educational experience for all students. The School Director will review all areas of the evaluation tool used by the School Board with the mentor to help the school leader provide the best direction and leadership for the school and the community.

2. Professional Development Prior to Opening. Ten days of professional development have been set aside to take place prior to school opening. Components of this professional development include the following:

- 10 hours devoted to school philosophy and policies
- 15 hours of Core Knowledge training, offered by one of TeamCFA's academic consultants and the school's Core Knowledge Coordinator. The training will provide a basis for the delivery of the Core Knowledge Sequence, as aligned with Indiana's Academic Standards
- 10 hours of training in the school's education technology, including CompassLearning
- 10 hours of training in crisis prevention, school security, first aid, and CPR
- 5 hours devoted to assisting students with disabilities and other special needs, including accommodations, IEPs, and 504 plans
- 5 hours devoted to formative and summative assessments, including state assessments
- 20 hours devoted to classroom preparation and lesson planning

3. Professional Development Through the Year. An informed and adequately trained teacher is the key to student success. With that in mind, ongoing professional development in best teaching practices, developing positive school culture, Core Knowledge, technology innovations and assessment data analysis will be provided throughout the school year. Four designated professional development days without students will be provided throughout the school year to cover areas of weakness found by the School Director and staff through data analysis and classroom observation. In addition, three half days will be provided to support and reinforce best instructional practices and to provide additional training to staff as identified by the school administration in conjunction with TeamCFA. Student achievement data from NWEA MAP testing will be one of the factors that drive both the full and half professional development days.

All professional development time will be flexible and will provide differentiated development based on staff's previous knowledge and needs. A few examples of the many professional development sessions offered by TeamCFA to network schools are Classroom Management, Effective Questioning, Core Knowledge Training, Singapore Math Training, NWEA MAP Training, NWEA MAP data analysis, CompassLearning Training, Educational Technology Usage Training and Google Apps for Education Training.

4. Evaluation of Professional Development. The professional development program will be evaluated by the school through classroom observations and the collection and analysis of assessment data, including the NWEA assessments and state assessments. This will be done by the School Director and will be then shared with the individual teachers and Governing Board. The School Director will

note specific implementation of the professional development through classroom observations, both formal and informal.

It is anticipated that the professional development provided to instructional staff will have a quantifiable positive impact on student achievement, as measured by the NWEA assessments during the year and the state assessments at the end of the year. The school may also choose to evaluate the effectiveness of the professional development program through the use of additional assessment systems.

It would be expected that students would show more than a year's academic growth if entering the school year at something less than grade level. For those students at grade level at the beginning of the school year, a minimum of one year's growth as measured on the NWEA assessment and a proficient score on the state assessment would be expected.

If these expectations are not met, a review of the implementation of the professional development would be undertaken by the school leader in conjunction with the TeamCFA mentor to determine whether the problem was in the professional development material and content or in the implementation by the individual instructors. It would be determined then to provide further support for the implementation or to augment the professional development to achieve the desired results.

At the Network level, TeamCFA collects NWEA data from all schools to allow for a comparison of best practices and to aid schools in developing best practices. This includes the professional development provided by the school. This information will be shared with members of the School Board who can then, in turn pose questions to the School Director about the effectiveness of the professional development if questions concerning student achievement should arise.

TeamCFA continually evaluates the professional development it provides through surveys, classroom observations, teacher comments, and improvement in student achievement. In the event that the professional development program should be found to need additional support in either content and delivery or implementation, TeamCFA provides experts to support the School Director and teachers at no cost to the school.

### **Start-Up & Operations**

1. Please see Attachment 17 for Start-Up Plan.
2. Please see Attachment 19 for Start-Up and Staffing Costs.
3. Transportation Plan. RP:CFA plans to provide transportation as necessary to ensure the targeted communities have safe access to and from the school. The budget includes funds for the purchase of three busses and related maintenance and upkeep. These busses will also be used for scheduled field trips. Bus routes will be developed once a facility has been secured. Any necessary budget adjustments will be made at that time. The school will meet all student needs under the federal McKinney-Vento Homeless Assistance Act, 42 USC 11431, for homeless students, as well as the Individuals with Disabilities Education Act and 511 IAC 7-43-1(u). Students who meet the federal definition of homeless will be provided free transportation with drop off and pick up at a public location. All modes of transportation provided will be ADA compliant for students with disabilities.

4. Safety and Security. Establishing policies for a safe teaching and learning environment is one of the primary responsibilities of the School Board. Policies have been developed in accordance with all applicable health and safety laws and regulations of federal and state government as they pertain to public school operation. These policies and procedures are provided to each staff member in a Safety manual. All staff will be trained before the start of school to ensure that they know what the procedures are in the event of an emergency as well as what measures have been put in place for the day to day safety of all those in the schools. The Dean of Students, in conjunction with the School Director, is responsible for seeing that the safety policies and procedures are implemented effectively in the school's instructional day as well as any other activities that take place in the school building.

The safety and security policies address the following: **(a)** Fire protection, **(b)** Accident prevention and reporting procedures, **(c)** Indoor air quality plan and asbestos inspections, **(d)** Multi-hazard plan, **(e)** Warning systems, **(f)** Emergency drills (local and community wide including fire, severe weather, earthquake and bomb threats), **(g)** Emergency closings, **(h)** Traffic safety, **(i)** Traffic and parking controls, **(j)** Safety inspections, **(k)** First aid, emergency medical care, infection control, **(l)** Student/employee provision of required health records and required immunizations, **(m)** Staff TB clearance and background checks, **(n)** Reporting of suspected child abuse/neglect, **(o)** Sexual harassment, and **(p)** Establishment of alcohol / drug / tobacco / violence free environment. Other topics for policy establishment may be developed after review and compliance with Indiana state policies and procedures when necessary.

Procedures to adequately protect school property shall include, but not be limited to: controlling the issuing of building keys and master keys and access devices; permitting access to classrooms, or other school facilities or equipment only to times when there is appropriate staff supervision; and procedure for securing teacher work areas when being left unattended or at the end of the instructional day.

All visitors must sign in at the main office and wear identification prior to admission to the general school building. The School Director will secure assistance from law enforcement officials when deemed necessary to maintain order or security during the school day or during extracurricular activities. The School Director will contact the Indianapolis Police Department in cases involving illegal entry, theft or vandalism. The School Director will notify the Board within 24 hours after each case of vandalism, theft, building damage and illegal entry.

5. RP:CFA is not providing a virtual environment.
6. Please see Attachment 18 for an estimate of Insurance Coverage.

## Facility Plan

1. RP:CFA has explored facilities options in the Far Eastside including empty IPS buildings, shared space in community church facilities, buildings previously occupied by charter schools, and repurposing empty retail space. The School Board will move forward with facility selection once the charter is approved.

RP:CFA may utilize the services of Challenge Foundation Properties to evaluate properties to determine renovation needs, estimated costs and the projected timeframe for completion.

Challenge Foundation Properties has extensive experience in working with state and local government agencies across the nation, including here in Indianapolis. The organization has completed numerous remodels of churches and commercial buildings, as well as completed new school buildings. In addition to evaluation of properties, Challenge Foundation Properties has committed its support in the acquisition of facilities for the school. Such support could include the purchase and renovation of a selected building that would then be leased to the school at an agreed upon rate.

2. A facility has not been identified. This section does not apply.
3. RP:CFA is not applying for more than one charter.

## Budget & Finance

1. Systems and Processes. RP:CFA will contract with a service provide for accounting services. We intend to contract with INIschools.

The Board of Directors will appoint a School Treasurer as required by State Board of Accounts (SBOA). The School Treasurer will work closely with INIschools to develop appropriate processes in order to facilitate purchasing, revenue recognition, grant management, fixed asset management, and financial reporting. INIschools will assist the school with implementation of Blackbaud Financial Edge fund accounting software. The software will be configured to track all revenue and expenditures in the appropriate funds as required by SBOA and for Form 9 reporting purposes.

The School Treasurer with assistance from INIschools will prepare the school budget annually based on reasonable assumptions in relation to expected enrollment, anticipated revenues, and estimated costs. The budget for the coming school year will be presented to the Board of Directors prior to the end of the current fiscal year for review and approval. A Purchase Order process will be put into place in order for the School Treasurer to have the opportunity to review, question, and approval or decline all purchases based on the current approved budget or in special cases, based on receipt of unexpected funds. On a monthly basis, INIschools will prepare financial statements and review them with the School Treasurer. This gives the School Treasurer the opportunity to review the reports and question any line items. After review, INIschools will prepare the final reports along with a financial narrative for submission to the Board. INIschools will also be available to attend Board meetings upon request.

RP:CFA intends to contract with a payroll provider to process all payroll and tax related transactions. INIschools is available to provide recommendations for appropriate vendors as well as provide oversight of the implementation of the payroll process. The payroll provider will be responsible for making all payroll tax payments as well as preparation of all tax reporting to the state and IRS and preparation of W2s.

RP:CFA will comply with state regulations that require an annual financial audit. INIschools is available to provide recommendations for appropriate CPA firms if needed. The School Treasurer will be responsible for interviewing reputable CPA firms and collecting quotes to be presented to the Board. The Board will be responsible for final approval of the CPA firm selected to perform the annual audit. School staff along with INIschools will provide financial statements and other

documentation as requested by the auditors in a timely manner. At the conclusion of the audit process, the auditors will present the Board with the final audited financial statements. The audit report will then be provided to ICSB as well as other interested parties.

In regards to the financial viability of the school, INIschools will provide the School Treasurer with reasonable cash flow projections that are updated monthly. All purchasing decisions for normal operations as well as large outlays of cash for capital purchases will be based on conservative projections. The school is aware that funds will be very tight in the first year of operations and will remain diligent to make wise decisions and be good stewards of our resources. In future years, the school will be committed to building up a reasonable amount of cash reserves in order to deal with unexpected needs.

2. Please see Attachment 19 for school budgets.
3. Please see Attachment 20 for budget narrative.

### Section V: PORTFOLIO REVIEW & PERFORMANCE RECORD

1. Attachment 21. TeamCFA does not house individual schools' data. Each school curates and archives its own federal and state data. With new schools being added every year and residing in multiple states, some school's data portfolios are more robust than others. All data available is included in Attachment 21.
2. High Performing School. Pioneer Preparatory School: A Challenge Foundation Academy is located in the heart of the Maryvale neighborhood of Phoenix, Arizona. Pioneer Prep is a K-6 preparatory elementary school where we work together toward the pursuit of academic greatness and positive character development in a safe and supportive learning environment. Approximately 95% of Pioneer's 625 students qualify for free or reduced lunch and over 67% qualify as English Language Learners with Spanish being their native language.

Pioneer Prep celebrates its strong academic performance today, but it hasn't always been that way. At the close of the 2010-2011 school year, Pioneer earned a D letter grade as calculated by the Arizona Department of Education based on the school's state assessment results (Arizona Instrument to Measure Standards or AIMS). TeamCFA and the school responded, initiating a bold and strategic plan that including the following components:

- Lesson planning focused on laser-specific objectives that were based on data collected from teacher-generated assessments in Galileo, Study Island, and retired AIMS questions
- Professional developments focused on data analysis, creation of valid assessments, and writing measurable objectives
- Data sharing across the entire school; transparency was paramount and every classroom was required to post up-to-date and relevant Galileo and NWEA data
- Biweekly grade level data meetings were held with the school director, interventionists, and instructional coaches in order to build data analysis skills, find and implement research-based instructional strategies, and learn about the inner workings of NWEA
- Instructional coaches trained the staff on how to create, run, and maintain small group instruction using Galileo and NWEA data



- The lowest performing students, as identified by NWEA data, were supported by a reading and math interventionist with focused instruction in identified learning gaps, after school tutoring, and a summer school program.

Pioneer Preparatory School was able to make strong academic growth, moving from a “D” to “B” in one academic year and maintaining that “B” for the subsequent three years. As the “B” was maintained, growth continued to occur for the subgroups of ELL, SPED, and the bottom 25%.

To support the implementation of the school’s plan, TeamCFA provided both a mentor for the school’s leadership team and a data specialist to work with the instructional coaches and school data team. This school’s success was the basis for the development of the TeamCFA School Support Team that now provides support to schools across the Network. All schools, regardless of performance, now have access to a mentor for its leader, a menu of professional development, NWEA MAP data analysis and action planning and other support as requested.

AIMS	Reading				Math			
	2011	2012	2013	2014	2011	2012	2013	2014
3rd Grade	60%	70%	74%	83%	50%	70%	68%	83%
4th Grade	52%	68%	65%	63%	31%	58%	65%	52%
5th Grade	75%	58%	79%	79%	28%	45%	75%	59%
6th Grade	74%	88%	59%	86%	38%	69%	51%	73%
7th Grade	79%	73%	86%	67%	45%	52%	81%	59%
8th Grade	29%	86%	59%	61%	18%	61%	55%	73%
Averages	61%	73%	70%	73%	35%	59%	65%	66%

3. Low Performance. Aristotle Preparatory Academy is a TeamCFA network school located in Charlotte, NC currently serving students in grades K-5. Aristotle resides in a very low socioeconomic area of the city. For the 2013-2014 school year, the school’s first year in existence, Aristotle received the rating of “D” by the State of North Carolina on the NC Report Card. In 3rd grade in 2013-2014, 33.3% of the students were proficient in math, and 55.6% of students were proficient in reading. In comparison, in the Charlotte Mecklenburg school district where this charter school is located, 65.5% of third grade students were proficient in math and 61.6% of students were proficient in reading.

Prior to the school’s second year, the administrative team assured the School Board and TeamCFA that the appropriate changes had been made, professional development was being provided, and concerns had been addressed. When the state evaluation was released, the school again received a rating of D.

TeamCFA completed an analysis of student achievement scores and found several areas of significant weakness. A professional development plan was proposed and implemented. During the implementation and in conjunction with the School Board, areas of significant weakness in administration and instruction were identified. A change in leadership was instituted by the School Board. TeamCFA began providing extensive support to the new school leadership and instructional staff. TeamCFA conducted a thorough review of all school activities with a corrective action plan provided to the School Board which is currently being implemented. TeamCFA will continue this extensive support until student achievement reaches an acceptable level.

This plan includes the following:

- A mentor is provided for the new school leadership. The mentor is working directly with the school leader to help ensure improvement in instruction and curriculum implementation, as well as effective school operations.
- Professional development is being provided to the instructional staff. This includes effective use of Core Knowledge and Singapore Math and best practices for classroom instruction.
- Professional development is being provided to staff on how to read, interpret and integrate NWEA MAP results into their classrooms. This includes using data to drive instruction.
- Data is being shared across the entire school. The TeamCFA School Support Team meets with individual teachers, grade levels and the staff as a whole to create and update action plans as needed after each testing session to include ability grouping, reteaching of basic skills and targeted interventions for individual students.
- Teachers received additional Professional Development training to more fully utilize the online software, CompassLearning. All students are completing activities on CompassLearning in their individualized learning paths.

The events and struggles at Aristotle identified several areas of concern. The first was the need for additional training of school board members to more quickly recognize struggles occurring within the school. Training board members to effectively read data and ask the correct questions is now being implemented across the Network. The second area was the need to work closely with new administrators in recognizing and addressing struggles within the school, specifically how to meet difficulties directly rather than deny them or hide them from their school board. All school leaders are now receiving additional support and training. The third concern was the need for focused professional development. Teachers lacked a thorough understanding of the curriculum they were teaching and many had limited instructional practices that could be implemented in the classroom. The School Support Team continues to develop professional training to support the effective implementation of Core Knowledge and Singapore Math and provide coaches to support individual teachers in their classroom instruction, both at Aristotle and across the Network.

4. Attachment 22. The most recent financial statements for Indianapolis Academy of Excellence: A Challenge Foundation Academy are also included as Attachment 22. The school's first year of operation ended June 30, 2015.
5. Attachment 23. Please see Attachment 23 for TeamCFA's most recent audited financial statements and management letter (Audit Report). TeamCFA does not have audited financial statements prior to the fiscal year ending June 30, 2015 because the business environment in which it was engaged did not require them. Financial statements and Form 990s for the calendar year ending December 31, 2013 and for the short year ending June 30, 2014 are included as alternative information. TeamCFA originally fell under a calendar year reporting cycle which ended December 31. In the

spring of 2014 the TeamCFA board voted to change the reporting period to a fiscal year ending June 30 because it more properly aligns with Network school calendars. As a result, there is a shortened cycle for the first year of the new reporting period which was June 30, 2014. The reader of these reports should be mindful that the reports ending December 31, 2013 and June 30, 2015 include a full twelve months' worth of financial activity. The reports which fall in middle – ending June 30, 2014 – include only six months' worth of financial activity.

6. Terminated Contracts. On two occasions, TeamCFA Foundation's Affiliate School Agreement with a charter school in its network has terminated. In both situations, TeamCFA has held a difference of opinion with the local governing board regarding the manner in which the charter school should be governed rather than a material breach of the Affiliate School Agreement and in both cases, the schools are still operating successful charter schools. When it became clear that the difference of opinion was irreconcilable, TeamCFA worked with the charter school to ensure that the school transitioned smoothly and without impact to the students and parents separated from the TeamCFA network. TeamCFA believes that by increasing its training and mentoring process with local schools, that the governance disagreements that occurred with these two schools will be avoided in the future.
7. Compromised Contracts. TeamCFA prides itself on its commitment to opening and running high-quality schools. No school in the TeamCFA Foundation's network of charter schools has been revoked, non-renewed, shortened or conditionally renewed, and no school has withdrawn or failed to open.
8. Performance Deficiencies. In Arizona, one of the four schools within the Network was required by the authorizer to submit a plan to improve academics. This school was in its first year of operation with 14 students in the only grade that was evaluated by the state test. The majority of the students who were assessed were English Language Learners and qualified for the Federal Free or Reduced Lunch program. The students tested into the school approximately two years below grade level for a variety of reasons. Although the school was able to make significant growth gains with these students, just over one-third were able to pass the state test. The school complied with the authorizer's request for a plan to improve this passing percentage. Internal assessments conducted by the school indicate that the students continue to make significant growth. The 2015 state data shows that the school exceeded the state's overall performance in math and in English Language Arts for its English Language Learners.
9. Litigation or Arbitration Proceedings. TeamCFA has not been involved in any litigation or arbitration proceedings. While some of our network schools have joined, as Plaintiffs, in litigation efforts to produce funding equality for charter schools, the TeamCFA network schools are locally autonomous private nonprofit corporations and therefore, TeamCFA has not been involved in such efforts. Further, other than these equity lawsuits, TeamCFA is not aware of any litigation or arbitration proceedings that have involved any of the TeamCFA network schools.

# Attachment 1

Rosa Parks:

A Challenge Foundation  
Academy

Board Member Resumes

# JEANNETTE BRAY

## EDUCATION

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- Grand Canyon University 2009  
*Masters Degree in Educational Leadership and Administration.*
- University of Phoenix 2007  
*Masters Degree in Secondary Education and Teaching Credential*
- Cal Poly University 1999  
*Bachelor of Science in Agriculture Business*

## PROFESSIONAL EXPERIENCE

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- Team CFA June 2015- Present  
*Curriculum and Instruction Coordinator*  
Work with the Leadership Development and School Support Team as an instructional coach developing curriculum support, and professional development as well as supporting teachers in instructional strategies and Core Knowledge Curriculum with fidelity for Team CFA Schools.
- Prescott Unified School District August 2014 – June 2015  
*Teacher Grade 8 Language Arts*  
Taught 8<sup>th</sup> grade language arts, completed over 30 hours of STEM training and Project Based Learning Workshops. Incorporated STEM into the classroom.
- Park View Schools Inc., July 2011- August 2014  
*Principal of a 6-12 Charter School*  
Manage all aspects of the teachers and their instructional development. Handled student and teacher discipline. Implemented new programs. Managed the facilities and budget. Expanded and refined community outreach and contact.
- Chino Valley Unified Schools July 2010- July 2011  
*Dean of Students/ Administrator*  
Administered the discipline policies. Worked with the English Department as department head to build curriculum. Monitored the online and alternative education programs. Student Council Advisor. Managed scholarship and college application program. Evaluated teachers and teacher effectiveness.
- Teacher of High School Language Arts.* July 2006- July 2010  
*Curriculum Developer, Language Arts, ELL and Foreign Language Department Head.*  
Taught middle and high school language arts courses at various levels. Managed the disaggregation of AIMS scores and implementation of interventions to improve performance. Developed all levels of high school language arts curriculum, supervised implementation of cross curricular programs and coordination of English classes with ELL and Foreign Language courses. Tutoring coordination.

Grand Canyon Unified Schools

March, 2005- June 2006

*Teacher of 8<sup>th</sup> 7<sup>th</sup> and 6<sup>th</sup> grade Science and Math*

Taught middle school science and math. Created curriculum for implementation of school's International Baccalaureate program. Over 40 hours of professional development in curriculum development and IB programs.

#### ADDITIONAL PROFESSIONAL ACTIVITIES

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- Led the Transition Team and Freshman Teacher teams at Chino Valley High School
- Curriculum Developer for Middle School Science International Baccalaureate Program at Grand Canyon Middle School
- Curriculum Leader and Department Head for 6-12 English Department and curriculum development.
- After school Tutoring Coordinator for AIMS prep and drop in tutoring, grades 9-12
- 2009/2010 Yavapai County Teacher of the Year Nominee.
- Trained on Common Core Curriculum, Core Knowledge K-8, Singapore Math, Fred Jones Instructional Management, STEM Program Development and Charlotte Danielson Framework for Teaching.

# Keyon Whiteside

keyon@5052@gmail.com ▪ 7989 Fawnwood Dr, Indianapolis, IN 46278 ▪ 317-750-8432

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## OBJECTIVE: Web Developer

### PROFILE

Dedicated, creative IT professional with excellent development skills and career experience in the design, development, and management of websites using various current technologies ▪ Self-directed with exemplary leadership and team-play skills and abilities ▪ Exceptional skills in business and project development and management, technical documentation, training, and client relations ▪ Highly adaptable to new situations and able to learn and apply new technologies quickly and thoroughly

### TECHNICAL SKILLS

- Software Design/Development
- Programming-OOP design
- Database Design/Management
- Website Design/Development
- Website Management
- Helpdesk Support
- Windows Server 2008
- Computer Build & Repair
- Windows 7,8/Vista
- Adobe Air Development
- Bootstrap
- Visual Basic
- Visual Basic.NET/ASP.NET
- JavaScript ▪ HTML ▪ XML
- CSS ▪ PHP, Ajax, Javascript
- Flash ▪ ActionScript
- Illustrator ▪ Photoshop
- Angular Js
- SEO
- ActionScript 3.0
- Premier Pro Video Editing
- Api Integration
- MS Office Suite/Virtual PC
- Visual Studios
- Windows XP
- Windows Server 2005 (Apache)
- LAN/WAN/Star/Ring
- SQL Server ▪ MySQL
- Flex3|Flex 4
- Networking
- Crystal Reports
- Exchange 2007

### EXPERIENCE

#### *2003-2007: NFL - Indianapolis Colts/ Cincinnati Bengals*

- Gained discipline, leadership, patience, and mental toughness necessary for success in business
- Involved with the Colts giving back to the community campaign that was led by the community relations department.

#### 2008- 2015 Director of Information Technology For HALLMARK HOMES INC.

- Develop, maintain and implement company's technology strategy
- Design, developed and maintain custom company Customer Relationship Management (CRM) software.
- Oversee online advertising and lead generation.
- Program and integrate merchant account payment processing systems.
- Manage and Service SQL Server 2005, 2008.
- Built Company Window Server 2008 and network from ground up.
- Manage and service Window Server 2008, IIS 7 and Active Directory.
- Developed training modules for sales reps and field managers.
- MySQL Database Development.
- Upgrade and maintain web and intranet sites
- Develop online web applications using FLEX 3.0, Mysql, Ajax, angular Js, Bootstrap and PHP
- Develop PHP, JQuery, Bootstrap & Angular.js Applications
- Develop desktop, mobile phone applications and online web application with Adobe Air
- Manage I.T. infrastructure for all company branches.
- Design and develop SQL and MySql relational databases
- Design and developed crystal reports.
- Develop and Design User Interfaces in flash and Flex

- Write and create complex Asp.net Webservice
- Maintain LAN and WAN Network
- Help Desk for all locations
- Create company web and mobile sites

2015-present Senior Developer for Willow Marketing

- Manage entire Digital Department and its personnel
- Responsible for department profitability and budgets
- Develop Backend/ custom enterprise software and web applications
- Identifying new technologies that lead to new business opportunities.

#### **Civic Involvement – Board of Directors**

Serve as a School Board of Director for Indianapolis Academy of Excellence

Help execute schools vision for creating tomorrow's next generation of leaders and entrepreneurs that will empower their community from within.

#### **EDUCATION**

University of Tennessee, Knoxville ▪ Bachelor of Arts Degree in Sociology ▪ 2002

#### **Languages Spoken**

English: Fluent



## TODD G. RELUE

1346 N. Delaware Street, Indianapolis, Indiana 46202  
(317) 637-0700 (o) / (317) 796-4347 (c) / trelue@psrb.com

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### PROFESSIONAL EXPERIENCE

#### **PLEWS SHADLEY RACHER & BRAUN**, Indianapolis, Indiana

*Partner*

2009 – Present

Work performed includes: serving as Co-Chair of Education Law practice group; advising charter and private schools on formation, land acquisition, construction, leasing, governance, and sustainability matters; litigating disputes over environmental liabilities and cost recovery in federal and state courts; managing environmental consultant work and governmental agency oversight; advising clients regarding leasing, lending, construction, and acquisition of commercial properties including those with unique environmental concerns.

#### **ROBINSON, BRADSHAW & HINSON**, Charlotte, North Carolina

*Associate*

2006 – 2009

Work performed includes: managing the acquisition, development, leasing, and sale of numerous commercial properties for national development firms; negotiating medical office leases and property purchases for regional hospital authority; representing NASCAR drivers and related entities in the purchase and leasing of industrial and commercial properties; preparing contracts, property management agreements, and fund formation documents; representing companies in obtaining loans, establishing joint ventures, and managing corporate acquisitions.

### EDUCATION

#### **DUKE UNIVERSITY SCHOOL OF LAW**, Durham, North Carolina

Juris Doctor, *with honors*, 2006

GPA: 3.72

- Activities:**
- Duke Law Journal*: Elected Note Editor; responsible for substantively editing student work and coordinating the journal's publishing process. (July 2004 to May 2006)
  - Duke Law Moot Court Board*: Finalist and winner of Best Brief at Catholic University's Sutherland Moot Court Competition. (April 2004 to May 2006)
  - Duke Bar Association Community Service Board*: Elected member of board; responsible for organizing numerous community service activities. (September 2003 to May 2006)

#### **INDIANA UNIVERSITY**, Bloomington, Indiana

Bachelor of Arts, *with highest honors*, Phi Beta Kappa, Political Science, Communications, 2003

GPA: 3.98

- Honors:** Wells Scholar; Chancellor's Scholar; Ford P. Hall Award.
- Activities:**
- Indiana University Student Foundation*: Appointed member of student leadership board; campaigned for greater involvement in community service; planned new community service events including a games day involving five children's organizations, 120 disadvantaged children, and 100 student volunteers. (September 2001 to May 2003)
- Theses:**
- Reinventing Just War: The War on Terrorism's Impact on Just War Theory*
  - Breaking Tradition: The Dangers of American Exceptionalism*

### COMMUNITY INVOLVEMENT

- President, Heritage Place of Indianapolis, Inc. (2011-2016)
- Member, Rector Search Committee, Trinity Episcopal Church (2015-2016)
- Member, ISBA Legal Ethics and Judicial System Committees (2013-2016)
- Volunteer, Judges and Lawyers Assistance Program (2012-2016)
- Volunteer Judge, Moot Court Board, I.U. Robert McKinney School of Law (2011-2015)
- Member, Indiana State Bar Association Leadership Development Academy (2012)

**Licensed to practice law in the States of Indiana and North Carolina**



***Charles J. Garcia***  
***President***  
***Kali Systems LLC.***  
***Indianapolis***

Charles J. "Charlie" Garcia is the President for Kali Systems LLC . He began as President in 2005. Born in San Francisco, CA, Garcia attended College of San Mateo, and graduated from the Way College of Biblical Research. Garcia attended Butler University, and completed Executive Programs from Dartmouth University, and University of California, Los Angeles.

- IMSDC 2009, Recognition as an Indiana Corporate Plus Member
- Madame Walker Spirit Award '02
- Whitney M. Young, Jr., Boy Scouts of America
- IRMSDC Supplier of the Year Award '00
- MICCS Safety Award '00
- Entrepreneur of the Year Award, State of Indiana
- Small Businessman of the Year Award, City of Indianapolis
- Regional Construction Company of the Year Award, SBA
- Growth 100 Award; one of top 10 fastest growing companies in Indiana
- Center for Leadership Development Entrepreneur of the Year

Garcia's greatest contributions, he says, are his efforts to mentor aspiring entrepreneurs. The mentoring program he developed has been adopted by the Greater Indianapolis Chamber of Commerce to assist minority and women owned businesses to grow at rates of 20 to 60 percent. As a founder of the Indiana Hispanic Scholarship Foundation, Charlie has helped increase educational opportunities for first-generation Hispanic college students.

Charlie's directorships included Butler University trustee, Bank One (Indiana) Federal Reserve Bank of Chicago, Indianapolis Museum of Art, Eiteljorg Museum, United Way of Indiana, Marian College trustee, Indiana Progress Industry Committee, Lynx Capital Corp., Crossroads of America Boy Scouts, and the Challenge School Academy Charter School.

Garcia's company recognitions included the Indianapolis Business Journal recognizing Kali Systems LLC. (as GM Construction) as Indiana's third largest minority-owned business in 2002 and 2003, and continually to being listed in the top 25 companies in Indianapolis.

**Additional Boards and Commissions**

St. Vincent Hospital, Board Member

IUPUI, Advisory Board Member

University of Indianapolis Board of Trustees

Indianapolis Symphony Orchestra, Board Member

Greater Indianapolis Chamber of Commerce, Board Member

Indianapolis Economic Development, Inc. Board of Directors, Member

Fifth Third Bank, Board Member

LYNK, Board Member

Hispanic Business Council, Member

La Plaza Board of Directors, Member

Strategic Capital Partners, Member

Challenge Foundation Schools, Member

Greater Indianapolis Chamber of Commerce, (Past Chair)

Indianapolis Private Industry Council, (Past Board Member)

Butler University Board of Trustees Scholarship, (Past Board Member)

City of Indianapolis, DEO Board Member

City of Indianapolis Contractors Board, (Past Board Member)

IN State Chamber of Commerce, (Past Board Member)

National Association of Minority Contractors of Indiana (Past Board Member)

# JAVIER BARRERA

MEDIA STRATEGIST &  
SOCIAL ENTREPRENEUR



## PROFILE

Javier Barrera Cervantes is an Indianapolis-based media strategist and social entrepreneur. His work focuses on exploring the intersection between marketing and urban education and their effect in identity formation. He is a founding board member of the Latino Youth Collective, a program that provides resources and opportunities for youth to engage in personal and community development through critical pedagogy, grassroots organizing and collective action.

Barrera also serves as the director of the Campecine Youth Academy, a summer research program that trains and employs youth to conduct research and enact social change in their community.



## LANGUAGES

FLUENT: ENGLISH & SPANISH



## EDUCATION

### SPECIALISED WORK | 2010

IUPUI SCHOOL OF LIBERAL ARTS  
TRANSLATION STUDIES

### BACHELORS DEGREE | 2009

IUPUI SCHOOL OF INFORMATICS  
MEDIA ARTS & SCIENCE



## CONTACT



## WORK EXPERIENCE

2015 - PRESENT **BALAM** | President & Founder  
Creative agency: strategy, design, and storytelling

2007 - PRESENT **LATINO YOUTH COLLECTIVE** | Chairman  
Youth development, Program director, Instructor

2009 - 2014 **TREMOBILORCAS** | President  
Web design & Development

2009-2010 **IUPUI** | Office of Community Service  
Marketing and communications

2006 - 2009 **A HREF INTERACTIVE** | Web designer



## SKILLS

### PLANNING

User experience  
Content strategy  
Information architecture  
Market & design research  
Social media strategies  
Campaigns  
Creative concepts

### DESIGN

Brand communication  
Application interfaces  
Mobile websites and apps  
Style guides  
Ads & media  
Corporate identity  
Interaction design

### TRAIN

Ethnographic research  
Video production  
Youth development  
Curriculum Design  
Digital imaging  
Podcasting



## PRESENTATIONS

**"The Shock Doctrine | Pervasive Marketing and The Rise of The Don't Give a F@#\$ Generation"** Growing up in an era of information overload, pervasive social marketing, and the lack of a persistent sense of historical conscience presents a wave of new challenges for those working with and for youth. This presentation takes a look into this generation and provides a framework on how we should prepare our youth to face the challenges of the 21st century.

2014 **"The Shock Doctrine | Pervasive Marketing and The Rise of The Don't Give a F@#\$ Generation"**

Latino Caucus Workshop Exploring Latinidad in the Midwest.  
Indianapolis, IN

2014 **"The Shock Doctrine | Pervasive Marketing and The Rise of The Don't Give a F@#\$ Generation"**

OutOfSchool Learning.  
Indianapolis, IN

2012 **"The Open Veins of Indianapolis"**

We Are City Summit  
Indianapolis, IN

2012 **"The Shock Doctrine | Pervasive Marketing and The Rise of The Don't Give a F@#\$ Generation"**

TEDx  
Indianapolis, IN

2012 **"The Don't Give a F@#\$ Generation"**

NUSA 2012  
Indianapolis, IN

2011 **"The Don't Give a F@#\$ Generation"**

Westminster College Leadership Conference | Keynote  
Fulton, Missouri

# Attachment 1

## Rosa Parks: A Challenge Foundation Academy

### TeamCFA Resumes

# **Anthony (Tony) Hicks Helton**

*181 Westview Street*

Forest City, North Carolina 28043

Phone 828-305-5204

## **WORK HISTORY:**

2015- Present            **Chief Operating Officer, TeamCFA**  
2014 - 2015            **Southeast Regional Director for the United States, TeamCFA**

2011 – 2014            **Brevard Academy: A Challenge Foundation Academy**  
**School Director**

2001 – 2011            **Thomas Jefferson Classical Academy: CFA**  
**Dean of Students, Athletic Director,**  
**Head Football Coach**  
Advance Placement Government and Politics Instructor

1992 – 1996            Elected Office  
**Rutherford County Government**  
Elected to Board of County Commission  
Chairman of the Board, 1994-1995

1989 – 2001            **Country Plaza, Cliffside, North Carolina**  
Owner/Operator of small convenience store chain  
(4 separate stores).

**Education:**            B. A. Political Science, 1989  
**University of South Carolina, Columbia, SC**  
Activities:  
    Member, Alpha Tau Omega Fraternity  
    Active in Student Government/Candidate for  
    Student Body President  
    Active at the local level in national politics  
**Chase High School, Forest City, NC 1985**

Family                    Married to Amy Warren Helton  
                              Children Victoria Elizabeth, Rachel Ann, Anthony Hicks, II, Benjamin Warren

Community            Member of Lions Club, Rotary Club

Church Membership    Florence Baptist Church, Forest City, NC

**TISHA L. CRISLER**  
**TEMPE, AZ**

**EDUCATION:** Bachelor of Arts degree in Accounting received from Fort Lewis College, Durango, CO - 08/91

**SIGNIFIGANT ACHIEVEMENTS**

- As an independent consultant I have been able to adapt to a variety circumstances by providing personalized service meant to serve the unique needs of each of my clients.
- I successfully completed and passed all parts of the Certified Public Accountants' Exam in November of 1993.

**WORK EXPERIENCE:**

TeamCFA Foundation  
Controller 07/14 – Present

- Management of all accounting related functions from transaction processing, budget management and financial reporting
- Development and implementation of strong financial policies and procedures
- Maintenance of financial records to insure compliance with federal and state agencies
- Analysis and comparison of financial data for all network schools

Crisler Business Services, LLC  
(Listing of Major Business Clients Provided)

10/97 - Present

While I have provided accounting services to small businesses throughout the Phoenix area, my practice currently focuses on providing financial management services to Arizona charter schools.

- Monthly or quarterly write up services ranging from all data input to review of general ledger activity and processing closing journal entries.
- Accurate and timely preparation of payroll and related tax forms.
- Processing and presenting customized board reports during attendance at monthly board meetings and/or finance committee meetings.
- Assistance with annual budget preparation and periodic comparative analysis throughout the year.
- Audit liaison services including preparation of audit work papers and improving communication between the auditor and the client.
- Business, non-profit and individual tax preparation.
- Grants management for charter school clients including spending compliance, cash management, completion reporting and site visit participation.
- Topical presentation and training on best business practices for charter schools offered to school directors, board members and Challenge Foundation fellows.

McCarthy Cabinet Company - Phoenix, AZ

Senior Accountant 7/95 - 10/97

- Maintenance of general ledgers for as many as four separate divisions including monthly balance sheet reconciliation, analytical review of profit and loss accounts, and final preparation of all financial statements including statements of cash flow and key indicator reports.
- Management of insurance relationship including the negotiation of general liability and workers' compensation renewals, handling of insurance audits, preparation of monthly workers' compensation reports, and requesting various certificates of insurance.
- Performance of daily accounts receivable duties including daily billing, application of cash receipts, and evaluation of credit applications and collections. Management of monthly progress billing of large commercial projects.

Carborundum Microelectronics - Phoenix, AZ

On temporary assignment for Accountemps 8/94 - 7/95

- Management of fixed assets including depreciation, additions, and retirements.
- Facilitation of monthly closing process including account reconciliation, and calculation of departmental budget variances.

Byrd, Proctor, & Mills PC - Nashville, TN

Junior Public Accountant 1/92 - 4/94

- Preparation of various income tax returns including individual, S corporation, C corporation, and partnerships.
- Performance of all phases of audits for real estate partnerships and not for profit organizations.
- Performance of various other public accounting functions including the preparation of payroll tax returns and the preparation of reviewed and compiled financial statements.

Centennial Savings Bank - Durango, CO

Various Positions Held 9/85 - 4/91

- Teller line duties including handling daily deposit and withdrawal transactions, sale of travelers' checks, money orders, and cashiers' checks. Responsible and successful in balancing cash drawer every day.
- Performance of customer service duties by listening to customer requests or problems and succeeded in offering and implementing solutions to those problems.

**SOFTWARE EXPERIENCE:**

Quickbooks (Pro & Premier)

Blackbaud – Accounting for Non Profits/Financial Edge

Peachtree

Microsoft Office Products

Evolution Payroll Software

**MAJOR BUSINESS CLIENTS:**

B & G Restaurant Refrigeration, Inc.	02/2003 – Present	Genesis Academy	09/1999 - Present
Ballet Arizona	10/1999 – 12/2005	Hirsch Academy: A Challenge Foundation Academy	Opening 08/2013
Pioneer Preparatory School: A Challenge Foundation Academy	07/2008 - Present	ICI Services Corporation/WGM	10/2003 – 08/2011
Four Legged Friends Animal Hospital	03/1998 - Present	Sun Valley Charter School	07/2009 – Present
Ridgeline Academy: A Challenge Foundation Academy	02/2011 – 03/2014	Trails of Scottsdale III/IV HOA	08/1999 – Present
Western School of Science and Technology: A Challenge Foundation Academy	02/2013 – Present	Valley Academy/Reid Traditional Schools	09/2007 – 11/2012
Ethos Academy: A Challenge Foundation Academy	03/2014 - Present	Team CFA Foundation & Challenge Foundation Properties	01/2014 - Present

**COMMITTEE ASSIGNMENTS:**

Team CFA Business Division – Oversees business operations of Team CFA and offers training and consultation to charter schools within the Team CFA network

Team CFA Community Relations Division – (09/12 – 11/14) – Served as the liaison between Team CFA network schools and the communities they serve; event planning for the Team CFA sponsored national conferences, board dinners and staff appreciation lunches

Kyrene Community Alliance – (08/11 – 05/13) – A group of community stakeholders supporting the Kyrene School District in preparing and managing the annual budget

First Southern Baptist Church of Scottsdale Stewardship Committee – (01/12 – 12/14): Provides oversight to church finances, prepares the annual budget and develops procedures related to financial management and giving policies.



# Kristen Rodriguez

krodriguez@teamcfa.org

## EXPERIENCE

### **Data and Instructional Technology Coordinator-TeamCFA**

Nationwide-4/15-Present

Responsibilities include professional development to over 2000 staff members among all schools in the TeamCFA network, supplying test data analysis at the network, school and classroom levels, oversight of all school websites as well as the teamcfa.org network site, curator of teamcfaresources.org website and network coordinator for educational software and hardware purchases.

#### **Accomplishments**

- Oversaw the production and launch of 15 new school websites
- Member of The Educational Technology Division

### **Educational Technology Specialist-TeamCFA**

Nationwide — 3/13-4/15

Responsibilities included providing professional development to over 2000 staff members among all schools in the TeamCFA network, test data analysis at the network, school and classroom levels, curator of teamcfaresources.org website and network coordinator for educational software and hardware purchases.

#### **Accomplishments**

- Created a website of nearly 2500 online resources for teachers aligned with Core Knowledge
- Created a comprehensive TeamCFA Network report which analyzes testing data to assess the effectiveness of our program to help students in at-risk situations

### **Technology Director/Testing Coordinator- New Dimensions Charter School-CFA**

Morganton, NC —8/11-3/13

Responsibilities included coordinating 1 to 1 laptop program for middle school students, maintaining the school computer lab, coordinating state and local assessments and accountability for all students and teaching technology related classes to students in K-8.

#### **Accomplishments**

- Implemented new 1 to 1 program for middle school students which included obtaining a grant for the hardware and infrastructure purchases
- Implemented new online assessment tool for all students K-8 including teacher professional development

### **Technology Teacher-New Dimensions Charter School-CFA**

Morganton, NC- 8/10-8/11

Taught technology related classes to students K-6.

### **Technology Teacher-All Saints Catholic School**

Sierra Vista, AZ- 8/9-6/10

Taught technology related classes to students K-8.

### **Fifth Grade Teacher-All Saints Catholic School**

Sierra Vista, AZ- 8/9-6/10

**First Grade Teacher-St. Mary's Catholic School**

Royal Oak Michigan- 8/96-6/98

**First Grade Teacher-Our Lady Queen of Angels Catholic School**

Detroit, MI- 8/95-6/96

**EDUCATION**

**Oakland University-Rochester, MI**

Bachelor of Science-Elementary Education 12/94



# Jill Burleson

5942 Marina View Lane Indianapolis, Indiana 46237  
T: 317.695.9302 E: jill@jillbconsult.com

## Summary

Results-oriented professional able to work across multiple fields and meet deadlines. Motivated, resourceful leader with proven ability to organize, plan, manage, and direct successful events, educational programs, public relations campaigns, and volunteer committees. Personable, confident, and poised in interactions with individuals at all levels. Able to negotiate and problem solve quickly, accurately, and efficiently. Adept at multitasking to achieve individual and team goals. Diverse background includes fundraising, communications, and event management.

## Experience

**Director of Advancement, TeamCFA** 2016- Present

- Oversee events, logistics, and communication for the organization while providing HR/administrative support to the organization.
- Manages and implements key events for the organization including the national four-day professional development conference held each year with over 300 attendees.

**Division Leader, TeamCFA** 2014- 2016

- Serves as Division Leader of Community Relations for TeamCFA, a national network of charter schools.
- Manages and implements key events for the organization including the national four-day professional development conference held each year with over 300 attendees.

**Owner, Jill Burleson Consulting, LLC** 2014-Present

Jill Burleson Consulting works with clients to conceptualize and implement meetings and events of all sizes and calibers. With nearly a decade of experience in event management and fundraising, Jill Burleson Consulting helps clients tell their story through events.

**Vocational Director, Golden Living** 2011-2014

- Scheduled, organized, and planned all logistics for events including, but not limited to, conventions, seminars, receptions, and lunches.
- Developed and managed budgets and negotiated contracts to ensure financially successful events.
- Directed and coordinated sheltered workshop activities to train and improve vocational skills as well as designed meticulous hiring program to improve employee hiring and retention and conducted new employee general orientation.

**Director of Advancement, Indiana Health Care Association** 2008-2011

- Developed and maintained all marketing materials and facilitated website and e-newsletter redesign.
- Maintained relationships with media, community, and key stakeholders. Scheduled, organized, and planned all logistics for events including, but not limited to, fundraisers,

trade shows, conventions, and seminars.

- Secured sponsorships for events while fostering lasting relationships. Sponsorships helped bring Former Speaker of the House Newt Gingrich and Former Senate Majority Leader Tom Daschle as keynote speakers for annual convention.
- Served as treasurer of IHCPAC. Coordinated industry lobbying efforts with the members of the PAC and kept the membership informed on lobbying efforts. Raised \$100,000 in 2009 for the PAC while creating annual donors program.

**Chief of Staff, Office of the First Lady, State of Indiana**

2006-2008

- Developed statewide Heart to Heart program, with the Indiana State Department of Health's Office of Women's Health, which strives to increase awareness, educate, and empower women to live heart healthy lifestyles by providing resources and support.
- Oversaw the First Lady's Heartland Walk for Health while increasing participation by 50 percent and sponsorship by 75 percent year over year.
- Developed marketing campaign and promotional video to promote the Indiana Department of Tourism's Leaf Cam project.
- Contributed copy for inserts in Indianapolis Woman Magazine and developed communication materials including, but not limited to, fact sheets, press releases, and brochures.
- Compiled, edited and, marketed First Lady's *Family First* cookbook.
- Managed, updated, and designed the Governor's Residence, First Lady and Heart to Heart websites.
- Developed and implemented media action plans, served as media contact, and pitched story to statewide media Maintained the First Lady's calendar and provided relevant information and talking points.

Residence Director, State of Indiana

2005-2006

Field Campaigner, Mitch Daniels for Governor Campaign

2004

**Activities**

Indiana Leadership Forum, active in several political campaigns, Nativity Catholic Church/School, helped found a local charter school- Indianapolis Academy of Excellence,

Jack Rowe  
1639 E. Tanya Road  
Phoenix, Arizona 85086  
602.620.3411  
[jrowe@teamcfa.org](mailto:jrowe@teamcfa.org)

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## Professional Experience

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TeamCFA Foundation	
Director of Leadership Development and School Support	April 2015-Present
Southwest Regional Director for TeamCFA	June 2014-April 2015
Board Representative -Piedmont Academy	June 2013 to May 2015
Leadership Consultant	August 2012 to Present
Westwind Children's Services	
Director of Curriculum and Instruction	October 2011 – Present
Phoenix Advantage Charter School	
Principal/Chief Administrative Officer	August 2007 – September 2011
Arizona Department of Education	
Director of State Intervention	March 2007 – August 2007
ASSIST Coach - Arizona Department of Education	September 2004 – March 2007
Career Pathways Academy Charter School	
Co-Founder/Principal	April 1997 – June 2001
Language Arts Teacher /Department Chair/Dean of Boys	
Glendale Union and Peoria Unified School Districts, Orme School	1977 – 2004

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## Skills and Experience

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- Co-wrote a successful charter school application
- Operated a charter high school
- Was Chief Administrative Officer for a charter elementary school with duties that included:
  - Instructional supervision
  - Evaluation and monitoring of all staff
  - All compliance requirements for both the Department of Education and the charter authorizer
  - All personnel matters
  - All financial matters
  - Recruitment and retention of staff and students

- Oversight of curriculum and instruction for a group of three charter schools
- Development and delivery of professional development for staff and administration
- Support for underperforming schools around the state as a member of the Department of Education's School Improvement with duties that included:
  - Support and professional development for administration
  - Support and professional development of instructional staff
  - Data analysis
- Leadership development and school support for all TeamCFA schools with duties that include:
  - Evaluation of current performance
  - Support and professional development for implementation of curriculum
  - Support and professional development of best instructional practices
  - Support and professional development for administration
  - Problem solving for administrative teams
  - Classroom observations of instructional practices and feedback for both instructors and administration
  - Development of evaluation and monitoring tools to be used by schools for internal evaluations
- Specialized training that includes:
  - Classroom Management by Dr. Fred Jones
  - How to work with students in poverty by Dr. Ruby Payne
  - Teacher evaluation through the Arizona Department of Education
  - Reading Improvement by Dr. Anita Archer
  - Singapore Math training
  - School Improvement Training through the Arizona Department of Education
  - Coaching administrators and teachers by the New Teacher Center, University of California

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## **Education**

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- Graduate credits in Administration, Teacher Supervision and Language Arts from Arizona State University West, Northern Arizona University, Middlebury College
- Bachelor of Science- Education, English Major - Indiana University

**DeAnna Rowe**  
1639 E Tanya Rd  
Phoenix, Arizona 85086  
602.526.8685  
[drowe@teamcfa.org](mailto:drowe@teamcfa.org)

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## Professional Experience

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### TeamCFA

Southwest Regional Director April 2015 - Present

### Arizona State Board for Charter Schools

Executive Director February 2007 – April 2015  
Director of Academic Affairs June 2001 – January 2007

### Career Pathways Academy

Co-Founder/Co-Director 1997 – May 2001

### Peoria Unified School District

Teacher 1992-1997

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## Skills and Experience

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- Relationship development with local community members, non-profits, neighborhood organizations and civic groups.
- Oversight of charter school application development.
- Manage agency operations including budget development, required reporting of state agency, and coordination and evaluation of staff performance.
- Ensure activities align with mission and strategic plan.
- Provide recommendations that are consistent with policies and are supported with evidence.
- Development of organizational structures and alignment and hiring of staff to support the implementation of strategic plan.
- Provided leadership and oversight of staff that monitors the operations of more than 500 charter schools operating under contracts with Arizona authorizer.
- Development of policies for board consideration based on research, best practices, and input from stakeholders through focus groups.
- Implementation of board policies including processes for school closure and the revocation of contracts of poor performing charter schools.
- Development and implementation of performance frameworks for oversight of all charter schools' academic, financial and operational performance.
- Develop corrective action plans for compliance and improvement of charter operations.
- Evaluate individual charter operations for alignment to the contract terms through paper and on-site visits monitoring.
- Provide expertise on charter school issues to various stakeholders including:
  - Policy recommendations as the State Board for Charter Schools' liaison with the Executive, Judicial, and Legislative branches of state government.
  - Reports to the Arizona State Board of Education on charter school matters.
  - Address conference and workshop attendees and serve on committees and study groups at the local and national level sharing charter school operations and oversight experience.
  - Testified at legal proceedings.

- Development and operation of a charter school.
  - Co-wrote an application for an approved charter, located property and oversaw the development of the facility.
  - Hired and supervised faculty. Led a curriculum team that developed an applied academics high school curriculum. Facilitated teacher in-services.
  - Established and maintained partnerships with business and industry as resources for teachers and students.
  - Wrote and administered grants. Developed and revised school budgets and annual financial reports.
  - Implemented closure procedures including placement of students, custody of records, and distribution of assets of the non-profit entity.

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## **Professional Activities**

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### For the State Board for Charter Schools

- Served, Build AZ Early Grade Success Work Group
- Panel Member – House Hearing, 112<sup>th</sup> Congress – EDUCATION REFORMS: EXPLORING THE VITAL ROLE OF CHARTER SCHOOLS, June 2011
- Member, National Association of Charter School Authorizers
- Served, Governor’s P-20 Coordinating Council of Arizona
- Served, Arizona Business and Education Coalition Board of Directors
- Served, Improving Teacher Quality Advisory Committee – Arizona Board of Regents
- Served, Governor’s Council for the Arizona Teacher Excellence Plan

### As an educator

- Served, Glendale Community College Business Advisory Committee
- Served, Glendale Urban Tech Prep Consortia Business Liaison
- Served, North Central Accreditation Public Relations and Steering Committee
- Member, Scottsdale and Glendale Chambers of Commerce

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## **Education**

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Master of Arts – Education: Emphasis in Curriculum and Instruction.  
Bachelor of Science – Business: Emphasis in Personnel Management.

Chapman University  
Arizona State University



## Attachment 2

Outline of One Year Leadership Development Program (June of year prior to school opening through June of opening year)

- I. New leader Attends TeamCFA Conference (June)
  - a. Introduce new leader to the culture of the network
  - b. Provide introductory training on curriculum, effective finances, excellent governance and support available.
  - c. Provide networking opportunities for new leader.
- II. Curriculum Training (July)
  - a. General overview of Core Knowledge and selected math programs begin with Leadership Development Team.
  - b. Core Knowledge Sequence is reviewed in depth with the Leadership Development Team.
  - c. Resources available through Core Knowledge website and the TeamCFA Resource Page are reviewed and demonstrated in depth.
  - d. Webinars available through Core Knowledge are viewed and discussed with Leadership Development Team.
  - e. TeamCFA support materials for Core Knowledge are reviewed and discussed with Leadership Development Team.
  - f. Year-At-A-Glance and domain maps are presented, reviewed and discussed with Leadership Development Team.
    - i. Year-At-A-Glance is created for those grades that will be served the first year.
    - ii. Domain maps for the first quarter of the year will be created for those grades to be served the first year
  - g. Math curriculum will be examined in detail. Specific training will occur in implementation as necessary through the Leadership Development Team.
- III. Curriculum Implementation Training (August-September)
  - a. Introduce CKLA to new leader.
  - b. New leader participates in Pre-service training at existing TeamCFA schools (both in home state and in other locations as necessary).
  - c. New leader does a careful examination of State Academic Standards and requirements within the school's state with the support of the Leadership Development Team.
  - d. New leader creates a crosswalk of Core Knowledge, Core Knowledge Language Arts, and the chosen math curriculum with the state standards. This is applied to the Year-At-A-Glance and domain maps.
- IV. Monitoring and Evaluation Training (September-February)
  - a. New leader will receive extensive training in monitoring and evaluation of instructional and support staff based on the work of Danielson and Stronge with the support of the Leadership Development Team
  - b. New leader will work through a wide range of "in-box" activities as well as role-play scenarios.
  - c. New leader will participate in classroom visitations with the Leadership Development Team as well as school leaders of TeamCFA schools within the network. Schools will mirror the population to be served as closely as possible for these observations
  - d. Classroom visitations/observations will vary in length and in time of day, week, and semester to simulate actual monitoring and evaluation procedures.

- e. New leader, in conjunction with the Leadership Development Team, will keep a record of all observations and recommendations/commendations that might be made to the teachers.
  - f. Leadership Development Team will use the record and the debriefing sessions to identify and address any instructional areas that the new leader may need to bolster or refine to support all instructional staff.
  - g. New leader will participate in grade level meetings at schools where observations have been conducted by the new leader. If permission is gained, the new leader may observe post-observation conferences within the schools as well.
  - h. New leader will review and revise (as necessary) job descriptions for support staff in the new school. These job descriptions will then be used to create evaluation rubrics for each position with the support of the Leadership Development Team.
  - i. New leader will participate in guided conversations with other school leaders concerning both instructional and non-instructional staff and effective evaluations as well as concerns and solutions.
  - j. New leader will conduct a minimum of five (5) formal observations of 40 minutes or longer. These will not be shared with the school or used as part of a teacher's evaluation process. A member of the Leadership Development Team will conduct the same observation and will then debrief after each one with the new leader. These will be used to identify areas to strengthen or refine for the new leader.
- V. Financial Training (October-March)
- a. New leader will review all appropriate state statutes, rules and reporting requirements for the state in which the new school will be located.
  - b. New leader will be able to explain to the Leadership Development Team, the funding formula, payment schedules and reporting requirements.
  - c. The new leader will prepare a mock budget for the new school with the projected enrollment. This budget will be used throughout the training to present various scenarios requiring adjustments to the budget.
  - d. New leader will observe school preparations and report for an annual financial audit of an existing TeamCFA school including
    - i. School preparation prior to the beginning of the audit
    - ii. Samples of requests made by auditors during the audit
    - iii. Areas being audited
    - iv. Report by the auditors to the governing board
  - e. Under the direction of the Leadership Development Team the new leader will meet with financial experts from the local area familiar with school finance, local property and utility costs as well as pay schedules for both instructional and non-instructional staff to help refine the mock budget.
  - f. By March the new leader will be able to work directly with the Leadership Development Team, TeamCFA, and the governing board of the school to create the budget for the new school that is accurate and reflects the realities of the community in which the school will be located.
- VI. Marketing Training (August-ongoing)
- a. New Leader will work closely with The Leadership Development Team and the school's governing board to create effective communication strategies for working with parents and community partners (August-January)
  - b. Beginning in January of the year the school will open the new leader will review marketing plans from existing TeamCFA schools of similar populations. A marketing

budget and calendar will be developed and presented to the governing board prior to the end of January.

- c. In conjunction with the governing board of the school and with the support of the Leadership Development Team, the new leader will expand upon the community contacts initiated by the governing board
  - d. As space is available the new leader will begin holding family interest meetings and begin the enrollment process. If the school building has been secured and available, the meetings will occur there.
- VII. Governance training (September-April)
- a. New school leader will receive training in appropriate meeting requirements of the state in which the school is located
    - i. Meeting notification requirements
    - ii. Executive session requirements
    - iii. Appropriate agenda creation
    - iv. Effective "Leader's report" requirements.
  - b. From September through December the new leader will attend all governing board meetings of his own school and will attend at least 3 governing board meetings of another TeamCFA school.
  - c. New leader will prepare monthly reports to the governing board of the school. These reports will be reviewed and comments/suggestions made by the Leadership Team.
  - d. New leader will attend State Board of Education meetings and authorizer meetings during the training period.
- VIII. Data Usage Training (October-May)
- a. New Leader will become familiar with the state testing requirements and expectations of the state in which the school is located, with the support of the Leadership Development Team
  - b. Using data from other TeamCFA schools or publicly released information concerning state testing, the new leader will be trained to:
    - i. Analyze the data
    - ii. Identify trends in the data
    - iii. Identify gaps in curriculum or instruction that are reflected in the data
    - iv. Identify corrections suggested by the data
  - c. New leader will be trained in the effective use of the NWEA benchmark assessments.
    - i. Be able to successfully administer the tests at the appropriate times
    - ii. Secure the data from the assessments effectively from the NWEA program
    - iii. Generate all reports using the NWEA program
    - iv. Successfully analyze and identify trends in both successful programs and areas of challenge
    - v. Create/Support/Adjust programs and instructional practices successfully based on the data provided by the benchmark assessments
  - d. New Leader will be trained to guide instructional staff in the creation of effective formative and summative assessments that reflect both the rigor of the content and the state expectations
- IX. Technology Training (August-October)
- a. New leader will receive training in the use of all hardware and software that will be in the school such as (but not limited to):
    - i. Chrome Books
    - ii. Mimeoos

- iii. Staff computers
    - iv. Google Classroom
    - v. State online reporting systems
  - b. New leader will receive training in the setup and effective use of Compass Learning for all students
  - c. New leader will be trained in securing usage and success rate reports from Compass Learning to enable the most successful use of this program.
  - d. Training and support will come through the Technology Division
- X. Culture, Special Needs, Special Population Training (September-May)
  - a. New Leader will receive training to support the population of the new school. This would include but is not limited to:
    - i. Children from low SES families
    - ii. English language learners
  - b. Training in these areas will focus on both the student needs and inclusion of the families into the school community
  - c. New leader will receive basic training in the identification of, monitoring of, and reporting on students with special needs.
- XI. Staff Hiring and retention (November-April)
  - a. New leader will work closely with the Leadership Development Team to develop interview questions, participate in mock interviews, review resumes collected from existing TeamCFA schools
  - b. New leader will review salary and bonus structures used by other schools and will create, with the support of the Leadership Development Team, a proposal for a salary and bonus structure including evaluation criteria that will be presented to the governing board for consideration prior to the May meeting.
  - c. Strategies used by other schools to retain excellent teachers will be reviewed and a plan developed and presented to the governing board prior to the May meeting.
  - d. Specific wording of the contracts to be used by the school for all employees will be developed by the new leader in conjunction with the governing board and such legal counsel as the governing board may choose.
- XII. Policy manuals and guidelines (October-June)
  - a. Under the guidance of the Leadership Development Team, the new leader will review staff and student handbooks, discipline policies and guidelines, and other policy manuals and guidelines deemed appropriate.
  - b. New Leader will develop manuals and guidelines compliant with state and federal laws as well as requirements presented by the school governing board and the state authorizer. Each manual and/or guideline will be presented to the governing board for adoption prior to the July meeting.

### Attachment 3

The proposed school's administrative/management team is not yet known.

The School Board will set finalized job descriptions and commensurate salaries. The school leader, as part of the Leadership Development Program, will recruit and hire the administrative team.

# Attachment 4

# Form 1023 Checklist

(Revised December 2013)

## Application for Recognition of Exemption under Section 501(c)(3) of the Internal Revenue Code

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**Note.** Retain a copy of the completed Form 1023 in your permanent records. Refer to the General Instructions regarding Public Inspection of approved applications.

**Check each box to finish your application (Form 1023). Send this completed Checklist with your filled-in application. If you have not answered all the items below, your application may be returned to you as incomplete.**

- Assemble the application and materials in this order:
- Form 1023 Checklist
  - Form 2848, *Power of Attorney and Declaration of Representative* (if filing)
  - Form 8821, *Tax Information Authorization* (if filing)
  - Expedite request (if requesting)
  - Application (Form 1023 and Schedules A through H, as required)
  - Articles of organization
  - Amendments to articles of organization in chronological order
  - Bylaws or other rules of operation and amendments
  - Documentation of nondiscriminatory policy for schools, as required by Schedule B
  - Form 5768, *Election/Revocation of Election by an Eligible Section 501(c)(3) Organization To Make Expenditures To Influence Legislation* (if filing)
  - All other attachments, including explanations, financial data, and printed materials or publications. Label each page with name and EIN.
- User fee payment placed in envelope on top of checklist. DO NOT STAPLE or otherwise attach your check or money order to your application. Instead, just place it in the envelope.
- Employer Identification Number (EIN)
- Completed Parts I through XI of the application, including any requested information and any required Schedules A through H.
- You must provide specific details about your past, present, and planned activities.
  - Generalizations or failure to answer questions in the Form 1023 application will prevent us from recognizing you as tax exempt.
  - Describe your purposes and proposed activities in specific easily understood terms.
  - Financial information should correspond with proposed activities.
- Schedules. Submit only those schedules that apply to you and check either "Yes" or "No" below.
- |            |  |            |  |
|------------|--|------------|--|
| Schedule A | Yes ___ No <input checked="" type="checkbox"/> | Schedule E | Yes ___ No <input checked="" type="checkbox"/> |
| Schedule B | Yes <input checked="" type="checkbox"/> No ___ | Schedule F | Yes ___ No <input checked="" type="checkbox"/> |
| Schedule C | Yes ___ No <input checked="" type="checkbox"/> | Schedule G | Yes ___ No <input checked="" type="checkbox"/> |
| Schedule D | Yes ___ No <input checked="" type="checkbox"/> | Schedule H | Yes ___ No <input checked="" type="checkbox"/> |

- An exact copy of your complete articles of organization (creating document). Absence of the proper purpose and dissolution clauses is the number one reason for delays in the issuance of determination letters.
  - Location of Purpose Clause from Part III, line 1 (Page, Article and Paragraph Number) Pg 1/3, Art. IV, p. A
  - Location of Dissolution Clause from Part III, line 2b or 2c (Page, Article and Paragraph Number) or by operation of state law Pg 2/3, Art IV, p. C,D,I
- Signature of an officer, director, trustee, or other official who is authorized to sign the application.
  - Signature at Part XI of Form 1023.
- Your name on the application must be the same as your legal name as it appears in your articles of organization.

Send completed Form 1023, user fee payment, and all other required information, to:

Internal Revenue Service  
P.O. Box 192  
Covington, KY 41012-0192

If you are using express mail or a delivery service, send Form 1023, user fee payment, and attachments to:

Internal Revenue Service  
201 West Rivercenter Blvd.  
Attn: Extracting Stop 312  
Covington, KY 41011



## Power of Attorney and Declaration of Representative

OMB No. 1545-0150

**For IRS Use Only**

Received by: \_\_\_\_\_

Name \_\_\_\_\_

Telephone \_\_\_\_\_

Function \_\_\_\_\_

Date / /

▶ Information about Form 2848 and its instructions is at [www.irs.gov/form2848](http://www.irs.gov/form2848).

**Part I Power of Attorney**

**Caution:** A separate Form 2848 must be completed for each taxpayer. Form 2848 will not be honored for any purpose other than representation before the IRS.

**1 Taxpayer information.** Taxpayer must sign and date this form on page 2, line 7.

Taxpayer name and address <b>Rosa Parks: A Challenge Foundation Academy, Inc.</b>		Taxpayer identification number(s) <b>47-4834024</b>	
		Daytime telephone number <b>219-728-9951</b>	Plan number (if applicable)

hereby appoints the following representative(s) as attorney(s)-in-fact:

**2 Representative(s)** must sign and date this form on page 2, Part II.

Name and address <b>Tracy L. Banker</b> <b>371 Newton Lane</b> <b>Valparaiso, Indiana 46383</b>	CAF No. _____ PTIN _____ Telephone No. <b>219-728-9951</b> Fax No. _____ Check if new: Address <input checked="" type="checkbox"/> Telephone No. <input checked="" type="checkbox"/> Fax No. <input type="checkbox"/>
<b>Check if to be sent copies of notices and communications</b> <input checked="" type="checkbox"/>	
Name and address  	CAF No. _____ PTIN _____ Telephone No. _____ Fax No. _____ Check if new: Address <input type="checkbox"/> Telephone No. <input type="checkbox"/> Fax No. <input type="checkbox"/>
<b>Check if to be sent copies of notices and communications</b> <input type="checkbox"/>	
Name and address  	CAF No. _____ PTIN _____ Telephone No. _____ Fax No. _____ Check if new: Address <input type="checkbox"/> Telephone No. <input type="checkbox"/> Fax No. <input type="checkbox"/>
(Note: IRS sends notices and communications to only two representatives.) Name and address  	CAF No. _____ PTIN _____ Telephone No. _____ Fax No. _____ Check if new: Address <input type="checkbox"/> Telephone No. <input type="checkbox"/> Fax No. <input type="checkbox"/>
(Note: IRS sends notices and communications to only two representatives.) Name and address  	CAF No. _____ PTIN _____ Telephone No. _____ Fax No. _____ Check if new: Address <input type="checkbox"/> Telephone No. <input type="checkbox"/> Fax No. <input type="checkbox"/>

to represent the taxpayer before the Internal Revenue Service and perform the following acts:

**3 Acts authorized (you are required to complete this line 3).** With the exception of the acts described in line 5b, I authorize my representative(s) to receive and inspect my confidential tax information and to perform acts that I can perform with respect to the tax matters described below. For example, my representative(s) shall have the authority to sign any agreements, consents, or similar documents (see instructions for line 5a for authorizing a representative to sign a return).

Description of Matter (Income, Employment, Payroll, Excise, Estate, Gift, Whistleblower, Practitioner Discipline, PLR, FOIA, Civil Penalty, Sec. 5000A Shared Responsibility Payment, Sec. 4980H Shared Responsibility Payment, etc.) (see instructions)	Tax Form Number (1040, 941, 720, etc.) (if applicable)	Year(s) or Period(s) (if applicable) (see instructions)
<b>Tax Exempt Application</b>	<b>Form 1023</b>	<b>Not Applicable</b>

**4 Specific use not recorded on Centralized Authorization File (CAF).** If the power of attorney is for a specific use not recorded on CAF, check this box. See the instructions for **Line 4. Specific Use Not Recorded on CAF** . . . . .

**5a Additional acts authorized.** In addition to the acts listed on line 3 above, I authorize my representative(s) to perform the following acts (see instructions for line 5a for more information):

Authorize disclosure to third parties;  Substitute or add representative(s);  Sign a return; \_\_\_\_\_

\_\_\_\_\_


Other acts authorized: \_\_\_\_\_

\_\_\_\_\_

**b Specific acts not authorized.** My representative(s) is (are) not authorized to endorse or otherwise negotiate any check (including directing or accepting payment by any means, electronic or otherwise, into an account owned or controlled by the representative(s) or any firm or other entity with whom the representative(s) is (are) associated) issued by the government in respect of a federal tax liability.  
List any other specific deletions to the acts otherwise authorized in this power of attorney (see instructions for line 5b):

**6 Retention/revocation of prior power(s) of attorney.** The filing of this power of attorney automatically revokes all earlier power(s) of attorney on file with the Internal Revenue Service for the same matters and years or periods covered by this document. If you do not want to revoke a prior power of attorney, check here   
**YOU MUST ATTACH A COPY OF ANY POWER OF ATTORNEY YOU WANT TO REMAIN IN EFFECT.**

**7 Signature of taxpayer.** If a tax matter concerns a year in which a joint return was filed, each spouse must file a separate power of attorney even if they are appointing the same representative(s). If signed by a corporate officer, partner, guardian, tax matters partner, executor, receiver, administrator, or trustee on behalf of the taxpayer, I certify that I have the legal authority to execute this form on behalf of the taxpayer.  
**▶ IF NOT COMPLETED, SIGNED, AND DATED, THE IRS WILL RETURN THIS POWER OF ATTORNEY TO THE TAXPAYER.**

 \_\_\_\_\_ Chair  
Signature Date Title (if applicable)


Todd Rehus Rosa Parks: A Challenge Foundation Academy, Inc.  
Print Name Print name of taxpayer from line 1 if other than individual

**Part II Declaration of Representative**

- Under penalties of perjury, by my signature below I declare that:
- I am not currently suspended or disbarred from practice, or ineligible for practice, before the Internal Revenue Service;
  - I am subject to regulations contained in Circular 230 (31 CFR, Subtitle A, Part 10), as amended, governing practice before the Internal Revenue Service;
  - I am authorized to represent the taxpayer identified in Part I for the matter(s) specified there; and
  - I am one of the following:
    - a Attorney—a member in good standing of the bar of the highest court of the jurisdiction shown below.
    - b Certified Public Accountant—licensed to practice as a certified public accountant is active in the jurisdiction shown below.
    - c Enrolled Agent—enrolled as an agent by the Internal Revenue Service per the requirements of Circular 230.
    - d Officer—a bona fide officer of the taxpayer organization.
    - e Full-Time Employee—a full-time employee of the taxpayer.
    - f Family Member—a member of the taxpayer's immediate family (spouse, parent, child, grandparent, grandchild, step-parent, step-child, brother, or sister).
    - g Enrolled Actuary—enrolled as an actuary by the Joint Board for the Enrollment of Actuaries under 29 U.S.C. 1242 (the authority to practice before the Internal Revenue Service is limited by section 10.3(d) of Circular 230).
    - h Unenrolled Return Preparer—Authority to practice before the IRS is limited. An unenrolled return preparer may represent, provided the preparer (1) prepared and signed the return or claim for refund (or prepared if there is no signature space on the form); (2) was eligible to sign the return or claim for refund; (3) has a valid PTIN; and (4) possesses the required Annual Filing Season Program Record of Completion(s). See *Special Rules and Requirements for Unenrolled Return Preparers in the instructions for additional information.*
    - k Student Attorney or CPA—receives permission to represent taxpayers before the IRS by virtue of his/her status as a law, business, or accounting student working in an LTC or STCP. See instructions for Part II for additional information and requirements.
    - r Enrolled Retirement Plan Agent—enrolled as a retirement plan agent under the requirements of Circular 230 (the authority to practice before the Internal Revenue Service is limited by section 10.3(e)).

**▶ IF THIS DECLARATION OF REPRESENTATIVE IS NOT COMPLETED, SIGNED, AND DATED, THE IRS WILL RETURN THE POWER OF ATTORNEY. REPRESENTATIVES MUST SIGN IN THE ORDER LISTED IN PART I, LINE 2.**

Note: For designations d-f, enter your title, position, or relationship to the taxpayer in the "Licensing jurisdiction" column.

Designation—insert above letter (a-r).	Licensing jurisdiction (State) or other licensing authority (if applicable).	Bar, license, certification, registration, or enrollment number (if applicable).	Signature	Date
a	IN, AZ	IN #24113-29, AZ #022810		3/3/10

Internal Revenue Service  
P.O. Box 2508  
Room 4024  
Cincinnati, OH 45201

RE: Request for Expedited Processing of Form 1023

To Whom It May Concern:

On behalf of Rosa Parks: A Challenge Foundation Academy, Inc. (EIN #47-4834024), please accept this letter as a request for expedited processing of Form 1023 Application for Recognition of Tax Exempt Status. Rosa Parks: A Challenge Foundation Academy, Inc. ("Rosa Parks") has applied for tax exempt recognition because its purpose is to open and operate a public charter school in the state of Indiana for children in grades Kindergarten through 8<sup>th</sup> grade.

Rosa Parks is awaiting receipt of start up funding for its charter school from TeamCFA Foundation. Rosa Parks will also apply for other grants that will be critical in the opening of its school in August 2017. Any grant monies received during 2016-2017 fiscal year, including the grant committed by TeamCFA, will be used to develop facilities, purchase supplies necessary for the instruction of students and cover payroll expense prior to Rosa Parks' receipt of state and county funding. Without such grants, Rosa Parks will be unable to fully open its doors to students in August 2017 as planned.

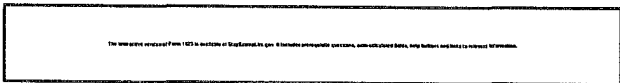
I have attached a letter from TeamCFA describing the need for the tax exempt determination.

We sincerely appreciate your consideration of Rosa Parks' request for expedited processing of its tax exempt application.

Sincerely,

  
Todd Reine  
Board Chair  
Rosa Parks: A Challenge Foundation Academy, Inc.

Enclosure



**Application for Recognition of Exemption**  
**Under Section 501(c)(3) of the Internal Revenue Code**

(00) OMB No. 1545-0056

**Note:** If exempt status is approved, this application will be open for public inspection.

Use with the June 2006 revision of the Instructions for Form 1023 and the current Notice 1382)

Use the instructions to complete this application and for a definition of all **bold** items. For additional help, call IRS Exempt Organizations Customer Account Services toll-free at 1-877-829-5500. Visit our website at [www.irs.gov](http://www.irs.gov) for forms and publications. If the required information and documents are not submitted with payment of the appropriate user fee, the application may be returned to you.

Attach additional sheets to this application if you need more space to answer fully. Put your name and EIN on each sheet and identify each answer by Part and line number. Complete Parts I - XI of Form 1023 and submit only those Schedules (A through H) that apply to you.

**Part I Identification of Applicant**

<b>1</b> Full name of organization (exactly as it appears in your <b>organizing document</b> )		<b>2</b> c/o Name (if applicable)	
Rosa Parks: A Challenge Foundation Academy, Inc.			
<b>3</b> Mailing address (Number and street) (see instructions)		Room/Suite	<b>4</b> Employer Identification Number (EIN)
817 E Todd Drive			47-4834024
City or town, state or country, and ZIP + 4		<b>5</b> Month the annual accounting period ends (01 - 12)	
Tempe, Arizona, 85283		06	
<b>6</b> Primary contact (officer, director, trustee, or <b>authorized representative</b> )		<b>b</b> Phone: 219-728-9951	
<b>a</b> Name: Tracy Banker		<b>c</b> Fax: (optional)	
<b>7</b> Are you represented by an authorized representative, such as an attorney or accountant? If "Yes," provide the authorized representative's name, and the name and address of the authorized representative's firm. Include a completed Form 2848, <i>Power of Attorney and Declaration of Representative</i> , with your application if you would like us to communicate with your representative.		<input checked="" type="checkbox"/> <b>Yes</b> <input type="checkbox"/> <b>No</b>	
<b>8</b> Was a person who is not one of your officers, directors, trustees, employees, or an authorized representative listed in line 7, paid, or promised payment, to help plan, manage, or advise you about the structure or activities of your organization, or about your financial or tax matters? If "Yes," provide the person's name, the name and address of the person's firm, the amounts paid or promised to be paid, and describe that person's role.		<input type="checkbox"/> <b>Yes</b> <input checked="" type="checkbox"/> <b>No</b>	
<b>9a</b> Organization's website:			
<b>b</b> Organization's email: (optional)			
<b>10</b> Certain organizations are not required to file an information return (Form 990 or Form 990-EZ). If you are granted tax-exemption, are you claiming to be excused from filing Form 990 or Form 990-EZ? If "Yes," explain. See the instructions for a description of organizations not required to file Form 990 or Form 990-EZ.		<input type="checkbox"/> <b>Yes</b> <input checked="" type="checkbox"/> <b>No</b>	
<b>11</b> Date incorporated if a corporation, or formed, if other than a corporation. (MM/DD/YYYY)		03 / 02 / 2015	
<b>12</b> Were you formed under the laws of a <b>foreign country</b> ? If "Yes," state the country.		<input type="checkbox"/> <b>Yes</b> <input checked="" type="checkbox"/> <b>No</b>	

**Part II Organizational Structure**

You must be a corporation (including a limited liability company), an unincorporated association, or a trust to be tax exempt. (See instructions.) **DO NOT file this form unless you can check "Yes" on lines 1, 2, 3, or 4.**

- 1** Are you a **corporation**? If "Yes," attach a copy of your articles of incorporation showing **certification of filing** with the appropriate state agency. Include copies of any amendments to your articles and be sure they also show state filing certification.  **Yes**  **No**
- 2** Are you a **limited liability company (LLC)**? If "Yes," attach a copy of your articles of organization showing certification of filing with the appropriate state agency. Also, if you adopted an operating agreement, attach a copy. Include copies of any amendments to your articles and be sure they show state filing certification. Refer to the instructions for circumstances when an LLC should not file its own exemption application.  **Yes**  **No**
- 3** Are you an **unincorporated association**? If "Yes," attach a copy of your articles of association, constitution, or other similar organizing document that is dated and includes at least two signatures. Include signed and dated copies of any amendments.  **Yes**  **No**
- 4a** Are you a **trust**? If "Yes," attach a signed and dated copy of your trust agreement. Include signed and dated copies of any amendments.  **Yes**  **No**
- b** Have you been funded? If "No," explain how you are formed without anything of value placed in trust.  **Yes**  **No**
- 5** Have you adopted **bylaws**? If "Yes," attach a current copy showing date of adoption. If "No," explain how your officers, directors, or trustees are selected.  **Yes**  **No**

**Part III Required Provisions in Your Organizing Document**

The following questions are designed to ensure that when you file this application, your organizing document contains the required provisions to meet the organizational test under section 501(c)(3). Unless you can check the boxes in both lines 1 and 2, your organizing document does not meet the organizational test. **DO NOT file this application until you have amended your organizing document.** Submit your original and amended organizing documents (showing state filing certification if you are a corporation or an LLC) with your application.

- 1** Section 501(c)(3) requires that your organizing document state your exempt purpose(s), such as charitable, religious, educational, and/or scientific purposes. Check the box to confirm that your organizing document meets this requirement. Describe specifically where your organizing document meets this requirement, such as a reference to a particular article or section in your organizing document. Refer to the instructions for exempt purpose language. Location of Purpose Clause (Page, Article, and Paragraph): Pg. 1/3, Art IV, par. A
- 2a** Section 501(c)(3) requires that upon dissolution of your organization, your remaining assets must be used exclusively for exempt purposes, such as charitable, religious, educational, and/or scientific purposes. Check the box on line 2a to confirm that your organizing document meets this requirement by express provision for the distribution of assets upon dissolution. If you rely on state law for your dissolution provision, do not check the box on line 2a and go to line 2c.
- 2b** If you checked the box on line 2a, specify the location of your dissolution clause (Page, Article, and Paragraph). Do not complete line 2c if you checked box 2a. Pg. 2/3, Art. IV, par. C,D, and E
- 2c** See the instructions for information about the operation of state law in your particular state. Check this box if you rely on operation of state law for your dissolution provision and indicate the state:

**Part IV Narrative Description of Your Activities**

Using an attachment, describe your *past, present, and planned* activities in a narrative. If you believe that you have already provided some of this information in response to other parts of this application, you may summarize that information here and refer to the specific parts of the application for supporting details. You may also attach representative copies of newsletters, brochures, or similar documents for supporting details to this narrative. Remember that if this application is approved, it will be open for public inspection. Therefore, your narrative description of activities should be thorough and accurate. Refer to the instructions for information that must be included in your description.

**Part V Compensation and Other Financial Arrangements With Your Officers, Directors, Trustees, Employees, and Independent Contractors**

- 1a** List the names, titles, and mailing addresses of all of your officers, directors, and trustees. For each person listed, state their total annual **compensation**, or proposed compensation, for all services to the organization, whether as an officer, employee, or other position. Use actual figures, if available. Enter "none" if no compensation is or will be paid. If additional space is needed, attach a separate sheet. Refer to the instructions for information on what to include as compensation.

Name	Title	Mailing address	Compensation amount (annual actual or estimated)
Keyon Whiteside	Vice-Chair	817 E Todd Drive Tempe, AZ 85283	0
Javier Barrera	Director	817 E Todd Drive Tempe, AZ 85283	0
Todd Relue	Chair	817 E Todd Drive Tempe, AZ 85283	0
Jeannette Bray	Treasurer/Secretary	817 E Todd Drive Tempe, AZ 85283	0
Charlie Garcia	Director	817 E Todd Drive Tempe, AZ 85283	0

**Part V Compensation and Other Financial Arrangements With Your Officers, Directors, Trustees, Employees, and Independent Contractors (Continued)**

**b** List the names, titles, and mailing addresses of each of your five highest compensated employees who receive or will receive compensation of more than \$50,000 per year. Use the actual figure, if available. Refer to the instructions for information on what to include as compensation. Do not include officers, directors, or trustees listed in line 1a.

Name	Title	Mailing address	Compensation amount (annual actual or estimated)
N/A			

**c** List the names, names of businesses, and mailing addresses of your five highest compensated independent contractors that receive or will receive compensation of more than \$50,000 per year. Use the actual figure, if available. Refer to the instructions for information on what to include as compensation.

Name	Title	Mailing address	Compensation amount (annual actual or estimated)
N/A			

The following "Yes" or "No" questions relate to *past, present, or planned* relationships, transactions, or agreements with your officers, directors, trustees, highest compensated employees, and highest compensated independent contractors listed in lines 1a, 1b, and 1c.

- 2a** Are any of your officers, directors, or trustees **related** to each other through **family or business relationships**? If "Yes," identify the individuals and explain the relationship.  **Yes**  **No**
  - b** Do you have a business relationship with any of your officers, directors, or trustees other than through their position as an officer, director, or trustee? If "Yes," identify the individuals and describe the business relationship with each of your officers, directors, or trustees.  **Yes**  **No**
  - c** Are any of your officers, directors, or trustees related to your highest compensated employees or highest compensated independent contractors listed on lines 1b or 1c through family or business relationships? If "Yes," identify the individuals and explain the relationship.  **Yes**  **No**
- 3a** For each of your officers, directors, trustees, highest compensated employees, and highest compensated independent contractors listed on lines 1a, 1b, or 1c, attach a list showing their name, qualifications, average hours worked, and duties.
- b** Do any of your officers, directors, trustees, highest compensated employees, and highest compensated independent contractors listed on lines 1a, 1b, or 1c receive compensation from any other organizations, whether tax exempt or taxable, that are related to you through **common control**? If "Yes," identify the individuals, explain the relationship between you and the other organization, and describe the compensation arrangement.  **Yes**  **No**
- 4** In establishing the compensation for your officers, directors, trustees, highest compensated employees, and highest compensated independent contractors listed on lines 1a, 1b, and 1c, the following practices are recommended, although they are not required to obtain exemption. Answer "Yes" to all the practices you use.
- a** Do you or will the individuals that approve compensation arrangements follow a conflict of interest policy?  **Yes**  **No**
  - b** Do you or will you approve compensation arrangements in advance of paying compensation?  **Yes**  **No**
  - c** Do you or will you document in writing the date and terms of approved compensation arrangements?  **Yes**  **No**

**Part V Compensation and Other Financial Arrangements With Your Officers, Directors, Trustees, Employees, and Independent Contractors (Continued)**

- d Do you or will you record in writing the decision made by each individual who decided or voted on compensation arrangements?  Yes  No
- e Do you or will you approve compensation arrangements based on information about compensation paid by **similarly situated** taxable or tax-exempt organizations for similar services, current compensation surveys compiled by independent firms, or actual written offers from similarly situated organizations? Refer to the instructions for Part V, lines 1a, 1b, and 1c, for information on what to include as compensation.  Yes  No
- f Do you or will you record in writing both the information on which you relied to base your decision and its source?  Yes  No
- g If you answered "No" to any item on lines 4a through 4f, describe how you set compensation that is **reasonable** for your officers, directors, trustees, highest compensated employees, and highest compensated independent contractors listed in Part V, lines 1a, 1b, and 1c.

- 5a Have you adopted a **conflict of interest policy** consistent with the sample conflict of interest policy in Appendix A to the instructions? If "Yes," provide a copy of the policy and explain how the policy has been adopted, such as by resolution of your governing board. If "No," answer lines 5b and 5c.  Yes  No
- b What procedures will you follow to assure that persons who have a conflict of interest will not have influence over you for setting their own compensation?
- c What procedures will you follow to assure that persons who have a conflict of interest will not have influence over you regarding business deals with themselves?

**Note:** A conflict of interest policy is recommended though it is not required to obtain exemption. Hospitals, see Schedule C, Section I, line 14.

- 6a Do you or will you compensate any of your officers, directors, trustees, highest compensated employees, and highest compensated independent contractors listed in lines 1a, 1b, or 1c through **non-fixed payments**, such as discretionary bonuses or revenue-based payments? If "Yes," describe all non-fixed compensation arrangements, including how the amounts are determined, who is eligible for such arrangements, whether you place a limitation on total compensation, and how you determine or will determine that you pay no more than reasonable compensation for services. Refer to the instructions for Part V, lines 1a, 1b, and 1c, for information on what to include as compensation.  Yes  No
- b Do you or will you compensate any of your employees, other than your officers, directors, trustees, or your five highest compensated employees who receive or will receive compensation of more than \$50,000 per year, through non-fixed payments, such as discretionary bonuses or revenue-based payments? If "Yes," describe all non-fixed compensation arrangements, including how the amounts are or will be determined, who is or will be eligible for such arrangements, whether you place or will place a limitation on total compensation, and how you determine or will determine that you pay no more than reasonable compensation for services. Refer to the instructions for Part V, lines 1a, 1b, and 1c, for information on what to include as compensation.  Yes  No

- 7a Do you or will you purchase any goods, services, or assets from any of your officers, directors, trustees, highest compensated employees, or highest compensated independent contractors listed in lines 1a, 1b, or 1c? If "Yes," describe any such purchase that you made or intend to make, from whom you make or will make such purchases, how the terms are or will be negotiated at **arm's length**, and explain how you determine or will determine that you pay no more than **fair market value**. Attach copies of any written contracts or other agreements relating to such purchases.  Yes  No
- b Do you or will you sell any goods, services, or assets to any of your officers, directors, trustees, highest compensated employees, or highest compensated independent contractors listed in lines 1a, 1b, or 1c? If "Yes," describe any such sales that you made or intend to make, to whom you make or will make such sales, how the terms are or will be negotiated at **arm's length**, and explain how you determine or will determine you are or will be paid at least fair market value. Attach copies of any written contracts or other agreements relating to such sales.  Yes  No

- 8a Do you or will you have any leases, contracts, loans, or other agreements with your officers, directors, trustees, highest compensated employees, or highest compensated independent contractors listed in lines 1a, 1b, or 1c? If "Yes," provide the information requested in lines 8b through 8f.  Yes  No
- b Describe any written or oral arrangements that you made or intend to make.
- c Identify with whom you have or will have such arrangements.
- d Explain how the terms are or will be negotiated at **arm's length**.
- e Explain how you determine you pay no more than fair market value or you are paid at least fair market value.
- f Attach copies of any signed leases, contracts, loans, or other agreements relating to such arrangements.

- 9a Do you or will you have any leases, contracts, loans, or other agreements with any organization in which any of your officers, directors, or trustees are also officers, directors, or trustees, or in which any individual officer, director, or trustee owns more than a 35% interest? If "Yes," provide the information requested in lines 9b through 9f.  Yes  No

**Part V Compensation and Other Financial Arrangements With Your Officers, Directors, Trustees, Employees, and Independent Contractors (Continued)**

- b Describe any written or oral arrangements you made or intend to make.
- c Identify with whom you have or will have such arrangements.
- d Explain how the terms are or will be negotiated at arm's length.
- e Explain how you determine or will determine you pay no more than fair market value or that you are paid at least fair market value.
- f Attach a copy of any signed leases, contracts, loans, or other agreements relating to such arrangements.

**Part VI Your Members and Other Individuals and Organizations That Receive Benefits From You**

The following "Yes" or "No" questions relate to goods, services, and funds you provide to individuals and organizations as part of your activities. Your answers should pertain to *past*, *present*, and *planned* activities. (See instructions.)

- 1a In carrying out your exempt purposes, do you provide goods, services, or funds to individuals? If "Yes," describe each program that provides goods, services, or funds to individuals.  Yes  No
- b In carrying out your exempt purposes, do you provide goods, services, or funds to organizations? If "Yes," describe each program that provides goods, services, or funds to organizations.  Yes  No
- 2 Do any of your programs limit the provision of goods, services, or funds to a specific individual or group of specific individuals? For example, answer "Yes," if goods, services, or funds are provided only for a particular individual, your members, individuals who work for a particular employer, or graduates of a particular school. If "Yes," explain the limitation and how recipients are selected for each program.  Yes  No
- 3 Do any individuals who receive goods, services, or funds through your programs have a family or business relationship with any officer, director, trustee, or with any of your highest compensated employees or highest compensated independent contractors listed in Part V, lines 1a, 1b, and 1c? If "Yes," explain how these related individuals are eligible for goods, services, or funds.  Yes  No

**Part VII Your History**

The following "Yes" or "No" questions relate to your history. (See instructions.)

- 1 Are you a **successor** to another organization? Answer "Yes," if you have taken or will take over the activities of another organization; you took over 25% or more of the fair market value of the net assets of another organization; or you were established upon the conversion of an organization from for-profit to non-profit status. If "Yes," complete Schedule G.  Yes  No
- 2 Are you submitting this application more than 27 months after the end of the month in which you were legally formed? If "Yes," complete Schedule E.  Yes  No

**Part VIII Your Specific Activities**

The following "Yes" or "No" questions relate to specific activities that you may conduct. Check the appropriate box. Your answers should pertain to *past*, *present*, and *planned* activities. (See instructions.)

- 1 Do you support or oppose candidates in **political campaigns** in any way? If "Yes," explain.  Yes  No
- 2a Do you attempt to **influence legislation**? If "Yes," explain how you attempt to influence legislation and complete line 2b. If "No," go to line 3a.  Yes  No
- b Have you made or are you making an **election** to have your legislative activities measured by expenditures by filing Form 5768? If "Yes," attach a copy of the Form 5768 that was already filed or attach a completed Form 5768 that you are filing with this application. If "No," describe whether your attempts to influence legislation are a substantial part of your activities. Include the time and money spent on your attempts to influence legislation as compared to your total activities.  Yes  No
- 3a Do you or will you operate bingo or **gaming** activities? If "Yes," describe who conducts them, and list all revenue received or expected to be received and expenses paid or expected to be paid in operating these activities. **Revenue and expenses** should be provided for the time periods specified in Part IX, Financial Data.  Yes  No
- b Do you or will you enter into contracts or other agreements with individuals or organizations to conduct bingo or gaming for you? If "Yes," describe any written or oral arrangements that you made or intend to make, identify with whom you have or will have such arrangements, explain how the terms are or will be negotiated at arm's length, and explain how you determine or will determine you pay no more than fair market value or you will be paid at least fair market value. Attach copies or any written contracts or other agreements relating to such arrangements.  Yes  No
- c List the states and local jurisdictions, including Indian Reservations, in which you conduct or will conduct gaming or bingo.



**Part VIII Your Specific Activities (Continued)**

**4a** Do you or will you undertake **fundraising**? If "Yes," check all the fundraising programs you do or will conduct. (See instructions.)  **Yes**  **No**

- mail solicitations
- email solicitations
- personal solicitations
- vehicle, boat, plane, or similar donations
- foundation grant solicitations
- phone solicitations
- accept donations on your website
- receive donations from another organization's website
- government grant solicitations
- Other

Attach a description of each fundraising program.

**b** Do you or will you have written or oral contracts with any individuals or organizations to raise funds for you? If "Yes," describe these activities. Include all revenue and expenses from these activities and state who conducts them. Revenue and expenses should be provided for the time periods specified in Part IX, Financial Data. Also, attach a copy of any contracts or agreements.  **Yes**  **No**

**c** Do you or will you engage in fundraising activities for other organizations? If "Yes," describe these arrangements. Include a description of the organizations for which you raise funds and attach copies of all contracts or agreements.  **Yes**  **No**

**d** List all states and local jurisdictions in which you conduct fundraising. For each state or local jurisdiction listed, specify whether you fundraise for your own organization, you fundraise for another organization, or another organization fundraises for you.

**e** Do you or will you maintain separate accounts for any contributor under which the contributor has the right to advise on the use or distribution of funds? Answer "Yes" if the donor may provide advice on the types of investments, distributions from the types of investments, or the distribution from the donor's contribution account. If "Yes," describe this program, including the type of advice that may be provided and submit copies of any written materials provided to donors.  **Yes**  **No**

**5** Are you **affiliated** with a governmental unit? If "Yes," explain.  **Yes**  **No**

**6a** Do you or will you engage in **economic development**? If "Yes," describe your program.  **Yes**  **No**

**b** Describe in full who benefits from your economic development activities and how the activities promote exempt purposes.

**7a** Do or will persons other than your employees or volunteers **develop** your facilities? If "Yes," describe each facility, the role of the developer, and any business or family relationship(s) between the developer and your officers, directors, or trustees.  **Yes**  **No**

**b** Do or will persons other than your employees or volunteers **manage** your activities or facilities? If "Yes," describe each activity and facility, the role of the manager, and any business or family relationship(s) between the manager and your officers, directors, or trustees.  **Yes**  **No**

**c** If there is a business or family relationship between any manager or developer and your officers, directors, or trustees, identify the individuals, explain the relationship, describe how contracts are negotiated at arm's length so that you pay no more than fair market value, and submit a copy of any contracts or other agreements.

**8** Do you or will you enter into **joint ventures**, including partnerships or **limited liability companies** treated as partnerships, in which you share profits and losses with partners other than section 501(c)(3) organizations? If "Yes," describe the activities of these joint ventures in which you participate.  **Yes**  **No**

**9a** Are you applying for exemption as a childcare organization under section 501(k)? If "Yes," answer lines 9b through 9d. If "No," go to line 10.  **Yes**  **No**

**b** Do you provide child care so that parents or caretakers of children you care for can be **gainfully employed** (see instructions)? If "No," explain how you qualify as a childcare organization described in section 501(k).  **Yes**  **No**

**c** Of the children for whom you provide child care, are 85% or more of them cared for by you to enable their parents or caretakers to be gainfully employed (see instructions)? If "No," explain how you qualify as a childcare organization described in section 501(k).  **Yes**  **No**

**d** Are your services available to the general public? If "No," describe the specific group of people for whom your activities are available. Also, see the instructions and explain how you qualify as a childcare organization described in section 501(k).  **Yes**  **No**

**10** Do you or will you publish, own, or have rights in music, literature, tapes, artworks, choreography, scientific discoveries, or other **intellectual property**? If "Yes," explain. Describe who owns or will own any copyrights, patents, or trademarks, whether fees are or will be charged, how the fees are determined, and how any items are or will be produced, distributed, and marketed.  **Yes**  **No**

**Part VIII Your Specific Activities (Continued)**

**11** Do you or will you accept contributions of: real property; conservation easements; closely held securities; intellectual property such as patents, trademarks, and copyrights; works of music or art; licenses; royalties; automobiles, boats, planes, or other vehicles; or collectibles of any type? If "Yes," describe each type of contribution, any conditions imposed by the donor on the contribution, and any agreements with the donor regarding the contribution.  **Yes**  **No**

**12a** Do you or will you operate in a **foreign country or countries?** If "Yes," answer lines 12b through 12d. If "No," go to line 13a.  **Yes**  **No**

**b** Name the foreign countries and regions within the countries in which you operate.  
**c** Describe your operations in each country and region in which you operate.  
**d** Describe how your operations in each country and region further your exempt purposes.

**13a** Do you or will you make grants, loans, or other distributions to organization(s)? If "Yes," answer lines 13b through 13g. If "No," go to line 14a.  **Yes**  **No**

**b** Describe how your grants, loans, or other distributions to organizations further your exempt purposes.  
**c** Do you have written contracts with each of these organizations? If "Yes," attach a copy of each contract.  **Yes**  **No**  
**d** Identify each recipient organization and any **relationship** between you and the recipient organization.  
**e** Describe the records you keep with respect to the grants, loans, or other distributions you make.  
**f** Describe your selection process, including whether you do any of the following:  
 (i) Do you require an application form? If "Yes," attach a copy of the form.  **Yes**  **No**  
 (ii) Do you require a grant proposal? If "Yes," describe whether the grant proposal specifies your responsibilities and those of the grantee, obligates the grantee to use the grant funds only for the purposes for which the grant was made, provides for periodic written reports concerning the use of grant funds, requires a final written report and an accounting of how grant funds were used, and acknowledges your authority to withhold and/or recover grant funds in case such funds are, or appear to be, misused.  **Yes**  **No**  
**g** Describe your procedures for oversight of distributions that assure you the resources are used to further your exempt purposes, including whether you require periodic and final reports on the use of resources.

**14a** Do you or will you make grants, loans, or other distributions to foreign organizations? If "Yes," answer lines 14b through 14f. If "No," go to line 15.  **Yes**  **No**

**b** Provide the name of each foreign organization, the country and regions within a country in which each foreign organization operates, and describe any relationship you have with each foreign organization.  
**c** Does any foreign organization listed in line 14b accept contributions earmarked for a specific country or specific organization? If "Yes," list all earmarked organizations or countries.  **Yes**  **No**  
**d** Do your contributors know that you have ultimate authority to use contributions made to you at your discretion for purposes consistent with your exempt purposes? If "Yes," describe how you relay this information to contributors.  **Yes**  **No**  
**e** Do you or will you make pre-grant inquiries about the recipient organization? If "Yes," describe these inquiries, including whether you inquire about the recipient's financial status, its tax-exempt status under the Internal Revenue Code, its ability to accomplish the purpose for which the resources are provided, and other relevant information.  **Yes**  **No**  
**f** Do you or will you use any additional procedures to ensure that your distributions to foreign organizations are used in furtherance of your exempt purposes? If "Yes," describe these procedures, including site visits by your employees or compliance checks by impartial experts, to verify that grant funds are being used appropriately.  **Yes**  **No**

**Part VIII Your Specific Activities (Continued)**

- 15 Do you have a **close connection** with any organizations? If "Yes," explain.  Yes  No

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- 16 Are you applying for exemption as a **cooperative hospital service organization** under section 501(e)? If "Yes," explain.  Yes  No

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- 17 Are you applying for exemption as a **cooperative service organization of operating educational organizations** under section 501(f)? If "Yes," explain.  Yes  No

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- 18 Are you applying for exemption as a **charitable risk pool** under section 501(n)? If "Yes," explain.  Yes  No

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- 19 Do you or will you operate a **school**? If "Yes," complete Schedule B. Answer "Yes," whether you operate a school as your main function or as a secondary activity.  Yes  No

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- 20 Is your main function to provide **hospital or medical care**? If "Yes," complete Schedule C.  Yes  No

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- 21 Do you or will you provide **low-income housing** or housing for the **elderly or handicapped**? If "Yes," complete Schedule F.  Yes  No

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- 22 Do you or will you provide scholarships, fellowships, educational loans, or other educational grants to individuals, including grants for travel, study, or other similar purposes? If "Yes," complete Schedule H.  Yes  No

**Note:** Private foundations may use Schedule H to request advance approval of individual grant procedures.

**Part IX Financial Data**

For purposes of this schedule, years in existence refer to completed tax years. If in existence 4 or more years, complete the schedule for the most recent 4 tax years. If in existence more than 1 year but less than 4 years, complete the statements for each year in existence and provide projections of your likely revenues and expenses based on a reasonable and good faith estimate of your future finances for a total of 3 years of financial information. If in existence less than 1 year, provide projections of your likely revenues and expenses for the current year and the 2 following years, based on a reasonable and good faith estimate of your future finances for a total of 3 years of financial information. (See instructions.)

**A. Statement of Revenues and Expenses**

	Type of revenue or expense	Current tax year	3 prior tax years or 2 succeeding tax years			(e) Provide Total for (a) through (d)
		(a) From 2015 To 2016	(b) From 2016 To 2017	(c) From 2017 To 2018	(d) From To	
<b>Revenues</b>	<b>1</b> Gifts, grants, and contributions received (do not include unusual grants)	260,450	2,837,085	3,742,180		6,839,715
	<b>2</b> Membership fees received					
	<b>3</b> Gross investment income					
	<b>4</b> Net unrelated business income					
	<b>5</b> Taxes levied for your benefit					
	<b>6</b> Value of services or facilities furnished by a governmental unit without charge (not including the value of services generally furnished to the public without charge)					
	<b>7</b> Any revenue not otherwise listed above or in lines 9-12 below (attach an itemized list)					
	<b>8</b> Total of lines 1 through 7	260,450	2,837,085	3,742,180		6,839,715
	<b>9</b> Gross receipts from admissions, merchandise sold or services performed, or furnishing of facilities in any activity that is related to your exempt purposes (attach itemized list)					
	<b>10</b> Total of lines 8 and 9	260,450	2,837,085	3,742,180		6,839,715
<b>11</b> Net gain or loss on sale of capital assets (attach schedule and see instructions)						
<b>12</b> Unusual grants						
<b>13</b> Total Revenue Add lines 10 through 12	260,450	2,837,085	3,742,180		6,839,715	
<b>Expenses</b>	<b>14</b> Fundraising expenses					
	<b>15</b> Contributions, gifts, grants, and similar amounts paid out (attach an itemized list)					
	<b>16</b> Disbursements to or for the benefit of members (attach an itemized list)					
	<b>17</b> Compensation of officers, directors, and trustees					
	<b>18</b> Other salaries and wages	119,350	1,292,982	1,615,038		
	<b>19</b> Interest expense					
	<b>20</b> Occupancy (rent, utilities, etc.)	97,499	418,554	535,781		
	<b>21</b> Depreciation and depletion					
	<b>22</b> Professional fees	10,500	100,500	132,170		
	<b>23</b> Any expense not otherwise classified, such as program services (attach itemized list)	14,025	854,327	823,188		
	<b>24</b> Total Expenses Add lines 14 through 23	241,374	2,666,363	3,106,177		

**Part IX Financial Data (Continued)**

**B. Balance Sheet (for your most recently completed tax year)**

		Year End: 2015
		(Whole dollars)
<b>Assets</b>		
1	Cash . . . . .	0
2	Accounts receivable, net . . . . .	
3	Inventories . . . . .	
4	Bonds and notes receivable (attach an itemized list) . . . . .	
5	Corporate stocks (attach an itemized list) . . . . .	
6	Loans receivable (attach an itemized list) . . . . .	
7	Other investments (attach an itemized list) . . . . .	
8	Depreciable and depletable assets (attach an itemized list) . . . . .	
9	Land . . . . .	
10	Other assets (attach an itemized list) . . . . .	
11	<b>Total Assets (add lines 1 through 10)</b> . . . . .	
<b>Liabilities</b>		
12	Accounts payable . . . . .	
13	Contributions, gifts, grants, etc. payable . . . . .	
14	Mortgages and notes payable (attach an itemized list) . . . . .	
15	Other liabilities (attach an itemized list) . . . . .	
16	<b>Total Liabilities (add lines 12 through 15)</b> . . . . .	0
<b>Fund Balances or Net Assets</b>		
17	<b>Total fund balances or net assets</b> . . . . .	0
18	<b>Total Liabilities and Fund Balances or Net Assets (add lines 16 and 17)</b> . . . . .	0
19	Have there been any substantial changes in your assets or liabilities since the end of the period shown above? If "Yes," explain.	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No

**Part X Public Charity Status**

Part X is designed to classify you as an organization that is either a **private foundation** or a **public charity**. Public charity status is a more favorable tax status than private foundation status. If you are a private foundation, Part X is designed to further determine whether you are a **private operating foundation**. (See instructions.)

- 1a Are you a private foundation? If "Yes," go to line 1b. If "No," go to line 5 and proceed as instructed. If you are unsure, see the instructions.  Yes  No
- b As a private foundation, section 508(e) requires special provisions in your organizing document in addition to those that apply to all organizations described in section 501(c)(3). Check the box to confirm that your organizing document meets this requirement, whether by express provision or by reliance on operation of state law. Attach a statement that describes specifically where your organizing document meets this requirement, such as a reference to a particular article or section in your organizing document or by operation of state law. See the instructions, including Appendix B, for information about the special provisions that need to be contained in your organizing document. Go to line 2.
- 2 Are you a private operating foundation? To be a private operating foundation you must engage directly in the active conduct of charitable, religious, educational, and similar activities, as opposed to indirectly carrying out these activities by providing grants to individuals or other organizations. If "Yes," go to line 3. If "No," go to the signature section of Part XI.  Yes  No
- 3 Have you existed for one or more years? If "Yes," attach financial information showing that you are a private operating foundation; go to the signature section of Part XI. If "No," continue to line 4.  Yes  No
- 4 Have you attached either (1) an affidavit or opinion of counsel, (including a written affidavit or opinion from a certified public accountant or accounting firm with expertise regarding this tax law matter), that sets forth facts concerning your operations and support to demonstrate that you are likely to satisfy the requirements to be classified as a private operating foundation; or (2) a statement describing your proposed operations as a private operating foundation?  Yes  No
- 5 If you answered "No" to line 1a, indicate the type of public charity status you are requesting by checking one of the choices below. You may check only one box.
 

The organization is not a private foundation because it is:

  - a 509(a)(1) and 170(b)(1)(A)(i)—a church or a convention or association of churches. Complete and attach Schedule A.
  - b 509(a)(1) and 170(b)(1)(A)(ii)—a school. Complete and attach Schedule B.
  - c 509(a)(1) and 170(b)(1)(A)(iii)—a hospital, a cooperative hospital service organization, or a medical research organization operated in conjunction with a hospital. Complete and attach Schedule C.
  - d 509(a)(3)—an organization supporting either one or more organizations described in line 5a through c, f, g, or h or a publicly supported section 501(c)(4), (5), or (6) organization. Complete and attach Schedule D.

**Part X Public Charity Status (Continued)**

- e 509(a)(4)—an organization organized and operated exclusively for testing for public safety.
- f 509(a)(1) and 170(b)(1)(A)(iv)—an organization operated for the benefit of a college or university that is owned or operated by a governmental unit.
- g 509(a)(1) and 170(b)(1)(A)(vi)—an organization that receives a substantial part of its financial support in the form of contributions from publicly supported organizations, from a governmental unit, or from the general public.
- h 509(a)(2)—an organization that normally receives not more than one-third of its financial support from gross investment income and receives more than one-third of its financial support from contributions, membership fees, and gross receipts from activities related to its exempt functions (subject to certain exceptions).
- i A publicly supported organization, but unsure if it is described in 5g or 5h. The organization would like the IRS to decide the correct status.

6 If you checked box g, h, or i in question 5 above, you must request either an **advance** or a **definitive ruling** by selecting one of the boxes below. Refer to the instructions to determine which type of ruling you are eligible to receive.

**a Request for Advance Ruling:** By checking this box and signing the consent, pursuant to section 6501(c)(4) of the Code you request an advance ruling and agree to extend the statute of limitations on the assessment of excise tax under section 4940 of the Code. The tax will apply only if you do not establish public support status at the end of the 5-year advance ruling period. The assessment period will be extended for the 5 advance ruling years to 8 years, 4 months, and 15 days beyond the end of the first year. You have the right to refuse or limit the extension to a mutually agreed-upon period of time or issue(s). Publication 1035, *Extending the Tax Assessment Period*, provides a more detailed explanation of your rights and the consequences of the choices you make. You may obtain Publication 1035 free of charge from the IRS web site at [www.irs.gov](http://www.irs.gov) or by calling toll-free 1-800-829-3676. Signing this consent will not deprive you of any appeal rights to which you would otherwise be entitled. If you decide not to extend the statute of limitations, you are not eligible for an advance ruling.

**Consent Fixing Period of Limitations Upon Assessment of Tax Under Section 4940 of the Internal Revenue Code**

For Organization

.....  
 (Signature of Officer, Director, Trustee, or other authorized official)

.....  
 (Type or print name of signer)

.....  
 (Date)

.....  
 (Type or print title or authority of signer)

For IRS Use Only

.....  
 IRS Director, Exempt Organizations

.....  
 (Date)

**b Request for Definitive Ruling:** Check this box if you have completed one tax year of at least 8 full months and you are requesting a definitive ruling. To confirm your public support status, answer line 6b(i) if you checked box g in line 5 above. Answer line 6b(ii) if you checked box h in line 5 above. If you checked box i in line 5 above, answer both lines 6b(i) and (ii).

- (i) (a) Enter 2% of line 8, column (e) on Part IX-A. Statement of Revenues and Expenses. \_\_\_\_\_
- (b) Attach a list showing the name and amount contributed by each person, company, or organization whose gifts totaled more than the 2% amount. If the answer is "None," check this box.
- (ii) (a) For each year amounts are included on lines 1, 2, and 9 of Part IX-A. Statement of Revenues and Expenses, attach a list showing the name of and amount received from each **disqualified person**. If the answer is "None," check this box.
- (b) For each year amounts are included on line 9 of Part IX-A. Statement of Revenues and Expenses, attach a list showing the name of and amount received from each payer, other than a disqualified person, whose payments were more than the larger of (1) 1% of line 10, Part IX-A. Statement of Revenues and Expenses, or (2) \$5,000. If the answer is "None," check this box.

7 Did you receive any unusual grants during any of the years shown on Part IX-A. Statement of Revenues and Expenses? If "Yes," attach a list including the name of the contributor, the date and amount of the grant, a brief description of the grant, and explain why it is unusual.  Yes  No

**Part XI User Fee Information**

You must include a user fee payment with this application. It will not be processed without your paid user fee. If your average annual gross receipts have exceeded or will exceed \$10,000 annually over a 4-year period, you must submit payment of \$850. If your gross receipts have not exceeded or will not exceed \$10,000 annually over a 4-year period, the required user fee payment is \$400. See instructions for Part XI, for a definition of gross receipts over a 4-year period. Your check or money order must be made payable to the United States Treasury. User fees are subject to change. Check our website at [www.irs.gov](http://www.irs.gov) and type "User Fee" in the keyword box, or call Customer Account Services at 1-877-829-5500 for current information.

- 1 Have your annual gross receipts averaged or are they expected to average not more than \$10,000?  Yes  No  
If "Yes," check the box on line 2 and enclose a user fee payment of \$400 (Subject to change—see above).  
If "No," check the box on line 3 and enclose a user fee payment of \$850 (Subject to change—see above).
- 2 Check the box if you have enclosed the reduced user fee payment of \$400 (Subject to change).
- 3 Check the box if you have enclosed the user fee payment of \$850 (Subject to change).

I declare under the penalties of perjury that I am authorized to sign this application on behalf of the above organization and that I have examined this application, including the accompanying schedules and attachments, and to the best of my knowledge it is true, correct, and complete.

Please Sign Here

  
(Signature of Officer, Director, Trustee, or other authorized official)

Todd Reine  
(Type or print name of signer)

3/3/2014  
(Date)

Chair  
(Type or print title or authority of signer)

Reminder: Send the completed Form 1023 Checklist with your filled-in-application. Form 1023 (Rev. 12-2013)

**Schedule B. Schools, Colleges, and Universities**

If you operate a school as an activity, complete Schedule B

**Section I Operational Information**

**1a** Do you normally have a regularly scheduled curriculum, a regular faculty of qualified teachers, a regularly enrolled student body, and facilities where your educational activities are regularly carried on? If "No," do not complete the remainder of Schedule B.  **Yes**  **No**

**b** Is the primary function of your school the presentation of formal instruction? If "Yes," describe your school in terms of whether it is an elementary, secondary, college, technical, or other type of school. If "No," do not complete the remainder of Schedule B.  **Yes**  **No**

**2a** Are you a public school because you are operated by a state or subdivision of a state? If "Yes," explain how you are operated by a state or subdivision of a state. Do not complete the remainder of Schedule B.  **Yes**  **No**

**b** Are you a public school because you are operated wholly or predominantly from government funds or property? If "Yes," explain how you are operated wholly or predominantly from government funds or property. Submit a copy of your funding agreement regarding government funding. Do not complete the remainder of Schedule B.  **Yes**  **No**

**3** In what public school district, county, and state are you located?

**4** Were you formed or substantially expanded at the time of public school desegregation in the above school district or county?  **Yes**  **No**

**5** Has a state or federal administrative agency or judicial body ever determined that you are racially discriminatory? If "Yes," explain.  **Yes**  **No**

**6** Has your right to receive financial aid or assistance from a governmental agency ever been revoked or suspended? If "Yes," explain.  **Yes**  **No**

**7** Do you or will you contract with another organization to develop, build, market, or finance your facilities? If "Yes," explain how that entity is selected, explain how the terms of any contracts or other agreements are negotiated at arm's length, and explain how you determine that you will pay no more than fair market value for services.  **Yes**  **No**

**Note.** Make sure your answer is consistent with the information provided in Part VIII, line 7a.

**8** Do you or will you manage your activities or facilities through your own employees or volunteers? If "No," attach a statement describing the activities that will be managed by others, the names of the persons or organizations that manage or will manage your activities or facilities, and how these managers were or will be selected. Also, submit copies of any contracts, proposed contracts, or other agreements regarding the provision of management services for your activities or facilities. Explain how the terms of any contracts or other agreements were or will be negotiated, and explain how you determine you will pay no more than fair market value for services.  **Yes**  **No**

**Note.** Answer "Yes" if you manage or intend to manage your programs through your own employees or by using volunteers. Answer "No" if you engage or intend to engage a separate organization or independent contractor. Make sure your answer is consistent with the information provided in Part VIII, line 7b.

**Section II Establishment of Racially Nondiscriminatory Policy**

Information required by Revenue Procedure 75-50.

**1** Have you adopted a racially nondiscriminatory policy as to students in your organizing document, bylaws, or by resolution of your governing body? If "Yes," state where the policy can be found or supply a copy of the policy. If "No," you must adopt a nondiscriminatory policy as to students before submitting this application. See Publication 557.  **Yes**  **No**

**2** Do your brochures, application forms, advertisements, and catalogues dealing with student admissions, programs, and scholarships contain a statement of your racially nondiscriminatory policy?  **Yes**  **No**

**a** If "Yes," attach a representative sample of each document.

**b** If "No," by checking the box to the right you agree that all future printed materials, including website content, will contain the required nondiscriminatory policy statement.

**3** Have you published a notice of your nondiscriminatory policy in a newspaper of general circulation that serves all racial segments of the community? (See the instructions for specific requirements.) If "No," explain.  **Yes**  **No**

**4** Does or will the organization (or any department or division within it) discriminate in any way on the basis of race with respect to admissions; use of facilities or exercise of student privileges; faculty or administrative staff; or scholarship or loan programs? If "Yes," for any of the above, explain fully.  **Yes**  **No**



**Schedule B. Schools, Colleges, and Universities (Continued)**

- 5 Complete the table below to show the racial composition for the current academic year and projected for the next academic year, of: (a) the student body, (b) the faculty, and (c) the administrative staff. Provide actual numbers rather than percentages for each racial category.  
 If you are not operational, submit an estimate based on the best information available (such as the racial composition of the community served).

Racial Category	(a) Student Body		(b) Faculty		(c) Administrative Staff	
	Current Year	Next Year	Current Year	Next Year	Current Year	Next Year
<b>Total</b>						

- 6 In the table below, provide the number and amount of loans and scholarships awarded to students enrolled by racial categories.

Racial Category	Number of Loans		Amount of Loans		Number of Scholarships		Amount of Scholarships	
	Current Year	Next Year	Current Year	Next Year	Current Year	Next Year	Current Year	Next Year
<b>Total</b>								

- 7a Attach a list of your incorporators, founders, board members, and donors of land or buildings, whether individuals or organizations.
- b Do any of these individuals or organizations have an objective to maintain segregated public or private school education? If "Yes," explain.  Yes  No
- 8 Will you maintain records according to the non-discrimination provisions contained in Revenue Procedure 75-50? If "No," explain. (See instructions.)  Yes  No



Rosa Parks : CFA, Inc.  
1023 Application

March 11, 2016

Dear Customer:

The following is the proof-of-delivery for tracking number **782550342160**.

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**Delivery Information:**

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<b>Status:</b>	Delivered	<b>Delivered to:</b>	Shipping/Receiving
<b>Signed for by:</b>	K.SCHEIDT	<b>Delivery location:</b>	COVINGTON, KY
<b>Service type:</b>	FedEx 2Day A.M	<b>Delivery date:</b>	Mar 10, 2016 10:12
<b>Special Handling:</b>	Deliver Weekday		
	Direct Signature Required		

Signature image is available. In order to view image and detailed information, the shipper or payor account number of the shipment must be provided.

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**Shipping Information:**

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<b>Tracking number:</b>	782550342160	<b>Ship date:</b>	Mar 8, 2016
		<b>Weight:</b>	2.0 lbs/0.9 kg

**Recipient:**  
COVINGTON, KY US

**Shipper:**  
VALPARAISO, IN US

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 IN 46383  
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 Transaction: 870131256016

FedEx 2Day A.M.  
 782550342160 1.6 LB (S) 28.00  
 Direct signature required  
 Declared Value 500

FedEx 2Day A.M.  
 782550353580 1.6 LB (S) 28.00  
 Direct signature required  
 Declared Value 500

Shipment subtotal: \$56.00

Total Due: \$56.00

(S) CreditCard: \$56.00

M = Weight entered manually  
 S = Weight read from scale  
 T = Taxable item

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Sender Address:  
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team cfa foundation  
371 NEWTON LN  
VALPARAISO, IN 46383-6998  
2197289951

Recipient Address:  
extracting stop 312  
internal revenue service  
201 W RIVERCENTER BLVD  
COVINGTON, KY 41011-1424  
0000000000

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Pricing option:  
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Package Information:  
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Payment Type:  
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Total Declared Value:  
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FedEx 2Day A.M. 1.6 LB (S) 28.00  
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State of Indiana  
Office of the Secretary of State

CERTIFICATE OF INCORPORATION

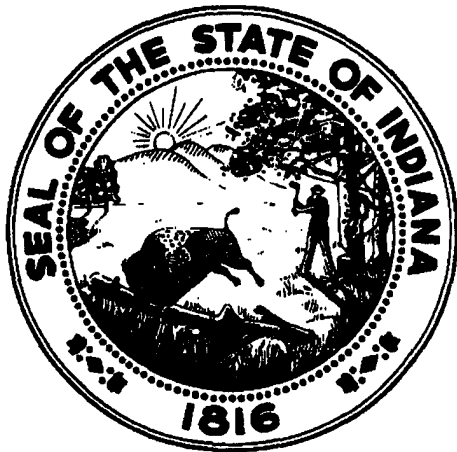
of

**ROSA PARKS: A CHALLENGE FOUNDATION ACADEMY, INC.**

I, Connie Lawson, Secretary of State of Indiana, hereby certify that Articles of Incorporation of the above Non-Profit Domestic Corporation has been presented to me at my office, accompanied by the fees prescribed by law and that the documentation presented conforms to law as prescribed by the provisions of the Indiana Nonprofit Corporation Act of 1991.

NOW, THEREFORE, with this document I certify that said transaction will become effective Monday, March 02, 2015.

In Witness Whereof, I have caused to be affixed my signature and the seal of the State of Indiana, at the City of Indianapolis, March 02, 2015



*Connie Lawson*

CONNIE LAWSON,  
SECRETARY OF STATE

**APPROVED AND FILED**  
CONNIE LAWSON  
INDIANA SECRETARY OF STATE  
3/2/2015 1:37 PM

**ARTICLES OF INCORPORATION**

Formed pursuant to the provisions of the Indiana Nonprofit Corporation Act of 1991.

**ARTICLE I - NAME AND PRINCIPAL OFFICE**

ROSA PARKS: A CHALLENGE FOUNDATION ACADEMY, INC.

817 E TODD DRIVE, TEMPE, AZ 85283

**ARTICLE II - REGISTERED OFFICE AND AGENT**

TRACY L BANKER  
371 NEWTON LANE, VALPARAISO, IN 46383

The Signator represents that the registered agent named in the application has consented to the appointment of registered agent.

**ARTICLE III - INCORPORATORS**

TRACY L BANKER  
371 NEWTON LANE, VALPARAISO, IN 46383  
Signature: TRACY L. BANKER

**ARTICLE IV - GENERAL INFORMATION**

Effective Date: 3/2/2015

Type of Corporation: Public Benefit Corporation

Does the corporation have members?: No

**The purposes/nature of business**

A. ROSA PARKS: A CHALLENGE FOUNDATION ACADEMY, INC. (THE "CORPORATION") IS FORMED TO OPERATE EXCLUSIVELY FOR CHARITABLE, SCIENTIFIC AND EDUCATIONAL PURPOSES AS DEFINED IN SECTION 501(C)(3) OF THE INTERNAL REVENUE CODE OF 1986, AS AMENDED ("THE CODE"), AND TO CONDUCT ANY AND ALL LAWFUL BUSINESS FOR WHICH NON-PROFIT CORPORATIONS MAY BE INCORPORATED UNDER THE LAWS OF INDIANA, AS MAY BE AMENDED FROM TIME TO TIME.

B. THE SPECIFIC PURPOSE FOR WHICH THE CORPORATION IS FORMED IS TO ORGANIZE AND OPERATE PUBLIC CHARTER SCHOOLS WITHIN THE STATE OF INDIANA AND UNDER INDIANA LAW, TO CONDUCT OTHER EDUCATIONAL OR SIMILAR ACTIVITIES AND ALL ACTS INCIDENTAL

THERETO.

C. REGARDLESS OF OTHER PROVISIONS OF THESE ARTICLES OF INCORPORATION, THE CORPORATION SHALL NOT CARRY ON ANY ACTIVITIES NOT PERMITTED FOR A CORPORATION EXEMPT FROM FEDERAL INCOME TAX UNDER SECTION 501(C)(3) OF THE CODE, OR FOR A CORPORATION, CONTRIBUTIONS TO WHICH ARE DEDUCTIBLE UNDER SECTION 170(C)(2) OF THE CODE, OR THE CORRESPONDING SECTION OF ANY FUTURE FEDERAL TAX CODE.

D. NO SUBSTANTIAL PART OF THE CORPORATION'S ACTIVITIES SHALL BE TO CARRY ON PROPAGANDA OR ATTEMPT TO INFLUENCE LEGISLATION, NOR SHALL THE CORPORATION PARTICIPATE IN ANY POLITICAL CAMPAIGN FOR ANY CANDIDATE FOR PUBLIC OFFICE, INCLUDING THE PUBLISHING OR DISTRIBUTION OF STATEMENTS.

E. THE CORPORATION SHALL NOT BE FOR PROFIT OR PECUNIARY GAIN AND SHALL HAVE NO CAPITAL STOCK OR SHARES; AND NO PART OF ANY EARNINGS OF THE CORPORATION SHALL INURE TO THE BENEFIT OF, OR BE DISTRIBUTABLE TO, ANY OFFICER OR DIRECTOR OF THE CORPORATION, ANY PRIVATE INDIVIDUAL OR BE APPROPRIATED FOR ANY PURPOSES OTHER THAN THE PURPOSES OF THE CORPORATION AS SET FORTH HEREIN; PROVIDED, HOWEVER, THAT THE CORPORATION SHALL BE AUTHORIZED AND EMPOWERED TO PAY REASONABLE COMPENSATION FOR SERVICES RENDERED AND TO MAKE PAYMENTS AND DISTRIBUTIONS IN FURTHERANCE OF THE PURPOSES OF THE CORPORATION SET FORTH HEREIN.

**Distribution of assets on dissolution or final liquidation**

UPON DISSOLUTION OF THE CORPORATION, THE BOARD OF DIRECTORS SHALL DISTRIBUTE ANY REMAINING ASSETS OF THE CHARTER SCHOOL FIRST TO SATISFY OUTSTANDING PAYROLL OBLIGATIONS FOR EMPLOYEES OF THE CHARTER SCHOOL, THEN TO CREDITORS OF THE CHARTER SCHOOL; AND THEN ANY REMAINING FUNDS RECEIVED FROM THE INDIANA DEPARTMENT OF EDUCATION SHALL BE RETURNED TO THE DEPARTMENT NOT MORE THAN THIRTY (30) DAYS AFTER DISSOLUTION. IF THE ASSETS OF THE CHARTER SCHOOL ARE INSUFFICIENT TO PAY ALL PARTIES TO WHOM THE CHARTER SCHOOL OWES COMPENSATION UNDER SUBDIVISION (1), THE PRIORITY OF THE DISTRIBUTION OF ASSETS MAY BE DETERMINED BY A COURT.

AFTER PAYING OR MAKING PROVISION FOR THE PAYMENT OF ALL OF THE LIABILITIES OF THE CHARTER SCHOOL AND OF THE CORPORATION, THE BOARD OF DIRECTORS SHALL DISPOSE OF ALL OF ITS ASSETS EXCLUSIVELY FOR THE PURPOSES OF THE CORPORATION IN SUCH MANNER, OR TO SUCH ORGANIZATIONS ORGANIZED AND OPERATED EXCLUSIVELY FOR CHARITABLE, EDUCATIONAL, RELIGIOUS OR SCIENTIFIC PURPOSES AS SHALL AT THE TIME QUALIFY AS AN EXEMPT ORGANIZATION OR ORGANIZATIONS UNDER SECTION 501(C)(3) OF THE CODE (OR THE CORRESPONDING SECTION OF ANY FUTURE FEDERAL TAX CODE, AS THE BOARD OF DIRECTORS SHALL DETERMINE.

**ARTICLE V**

INDEMNIFICATION: NO DIRECTOR, OFFICER, GOVERNING BOARD MEMBER, OR COMMITTEE MEMBER SHALL, MERELY BY VIRTUE OF SUCH OFFICE OR POSITION, INCUR OR BE SUBJECT TO PERSONAL LIABILITY TO ANY EXTENT FOR ANY INDEBTEDNESS OR OBLIGATIONS FROM ACTS OR OMISSIONS OF THE CORPORATION AND THE CORPORATION SHALL INDEMNIFY ANY DIRECTOR, OFFICER,

GOVERNING BOARD MEMBER OR COMMITTEE MEMBER AGAINST ANY COSTS OR EXPENSES, INCLUDING WITHOUT LIMITATION, ATTORNEYS FEES, JUDGMENTS, FINES, PENALTIES, TAXES, INTEREST AND AMOUNT PAID IN SETTLEMENT ACTUALLY INCURRED BY REASON OF THE FACT THAT HE OR SHE IS OR WAS A DIRECTOR, OFFICER, GOVERNING BOARD MEMBER OR COMMITTEE MEMBER TO THE MAXIMUM EXTENT PERMITTED UNDER INDIANA LAW IN EFFECT AT THAT TIME.

#### **ARTICLE VI**

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AMENDMENT: THE BOARD OF DIRECTORS OF THE CORPORATION MAY AMEND OR REPEAL THESE BYLAWS OR ADOPT NEW BYLAWS, BY THE AFFIRMATIVE VOTE OF TWO-THIRDS OF ALL THE DIRECTORS PRESENT AND VOTING AT A MEETING OF THE BOARD IN WHICH A QUORUM HAS BEEN ESTABLISHED. THE MEETING NOTICE SHALL STATE THAT THE PURPOSE OF THE MEETING IS TO CONSIDER AN AMENDMENT TO THE BYLAWS AND SHALL CONTAIN A COPY OR SUMMARY OF THE PROPOSED AMENDMENT.



**BYLAWS**  
of  
**ROSA PARKS: A CHALLENGE FOUNDATION ACADEMY, Inc.**  
(March 3, 2016)

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**ARTICLE I**  
**CORPORATE NAME**

1.1 **Name.** The name of the Corporation is Rosa Parks: A Challenge Foundation Academy, Inc. ("Corporation").

**ARTICLE II**  
**OFFICES**

2.1 **Offices.** The Corporation's principal office, known place of business and place where records shall be kept is 817 East Todd Drive, Tempe, Arizona 85283. The Corporation may change its principle office, or adopt other and additional offices, as the Corporation's Board of Directors may, from time to time, determine.

**ARTICLE III**  
**NONPROFIT CORPORATION**

3.1 **Purposes.** The Corporation is established as not for profit corporation for any lawful purpose permitted under Indiana State law. Initially, the Corporation will establish, market, and operate one or more public charter schools in accordance with the laws of Indiana. No fees for the operation, marketing, and establishment of each charter school shall be collected by the Corporation. For purposes of federal law, the Corporation is organized only for charitable and educational purposes as defined by the Internal Revenue Code of 1986, as amended (The "Code"), section 501(c)(3), including organizations that qualify as exempt under Section 501(c)(3) of the Code. The Corporation shall not willfully carry on propaganda, or otherwise attempt to influence legislation, nor shall any of its funds be used to support or oppose any political issue or candidate. The Corporation will not take any action or fail to act in a way that will jeopardize its status as a nonprofit corporation in the state of Indiana or jeopardize any tax event status of the Corporation under Section 501(c)(3) of the Code. No part of the assets or net earnings of the Corporation, current or accumulated, shall inure to the benefit of any private individual except for any and all contracts that may be entered into with any individuals as provided and afforded by these Bylaws and appropriate resolutions of the Corporation's Board of Directors (the "Board").

**ARTICLE IV**  
**MEMBERSHIP**

4.1 **Members.** The Corporation shall not have any corporate members.

**ARTICLE V**  
**BOARD OF DIRECTORS**

5.1 **Name.** The Board of the Corporation shall be publicly known and described as the "Governing Board". Any individual serving on the Board shall be referred to as a "Director".

5.2 **Duty and Powers.** The Board shall have all of the duties and powers required or permitted by applicable law. All corporate powers shall be exercised by or under the authority of, and the business and affairs of the Corporation shall be managed by the Board.

5.3 **Number of Directors.** The number of Directors shall be no less than five and no more than eleven, as specified by a duly authorized resolution of the Board, subject always to any restriction of Indiana law as to the minimum number of Directors. This initial number of directors shall be five.

5.4 **Election of Directors.** Except as otherwise provided in the Articles of Incorporation or these Bylaws, Directors shall be elected by a majority vote of the Directors present at any duly called regular or special meeting of the Directors at which a quorum has been established. Directors may be removed, replaced, or changed as provided for in these Bylaws. Directors need not be residents of the State of Indiana.

5.4.1 **TeamCFA Board Representatives.** As required by any affiliate agreement with TeamCFA Foundation, Directors serving as TeamCFA Board Representatives shall be appointed and removed by TeamCFA Foundation. In all other respects, including term limits, TeamCFA Board Representatives shall be subject to these Bylaws.

5.5 **Term of Office.** Except as set forth in Section 5.5.1, 5.5.2 and 5.9 of these Bylaws, each Director shall hold office for a period of two years from the date he or she is elected, qualified, and accepts the appointment, or until his or her prior death, incapacitation, resignation, replacement or removal. Directors may serve multiple terms; however, at the conclusion of a Director's second consecutive full term in office, the Director must wait one year prior to serving another term.

5.5.1 **Founding Board of Directors.** The initial board of director shall comprise 5 directors. Three of the initial directors shall be designated to serve an initial term of 1 year. The remaining 2 directors shall serve an initial term of 2 years.

5.5.2 **Board Expansion.** Pursuant to Section 5.3, the Board of Directors may amend the number of directors at any time by resolution of the Board. If the Board amends the number of Directors, it shall ensure that no more than half of the directors' terms will expire at the same time.

5.6 **Qualifications.** Directors must be more than 21 years of age. Each Director must pass a background check or other regulatory inquiries as required by Indiana law, Federal Law, or other governmental agency requirements. At a minimum, all Directors will undergo a criminal background check showing there is no criminal record which could adversely affect the Corporation or its operations. Directors must possess experience and qualifications that further the Board's commitment to the education and operation purposes of the Corporation. Director's must serve a minimum of six months as a member of the Advisory Council of the Board.

5.7 **Board Offices.** The Officers of the Board shall comprise a Chair of the Board, Vice-Chair of the Board, Secretary of the Board, and Treasurer of the Board. Officers shall be elected by a majority vote of the Directors present at a duly called meeting of the Board at which a quorum has been established. Once these Bylaws become effective, a Director shall also be required to be a member of the Board for six months before being eligible to be elected an Officer of the Board. Officers shall serve in one year terms, with no restriction on number of terms permitted.

5.8 **Director Deadlock.** In the unlikely event of a voting deadlock on any substantial matter affecting the Corporation or the Board, the Board shall, within 10 days of the deadlock, appoint a mutually-agreed-upon neutral mediator to aid the Board in facilitating the decision making process. No consent to a proposed mediator shall be unreasonably withheld. If after the appointment of a mediator the deadlock persists for a period not to exceed 45 days after the original deadlock vote, the Board shall, within ten days thereafter, agree upon a neutral qualified arbitrator who shall have the authority to issue a decision with respect to the deadlocked issue. This decision shall be binding on the Board and each Director. The agreement of a neutral arbitrator shall not be unreasonably withheld.

5.9 **Vacancies.** Any vacancy of the Board occurring by a reason of increase in the number of Directors shall be filled by a majority vote of the Directors cast at any regular or special meeting of the Board at which a quorum has been established. In the event any Director dies, becomes incapacitated, resigns, is disqualified or removed from office, or otherwise vacates his or her office, the unexpired portion of such Director's term of office shall be filled by a majority vote of the remaining Directors present at a regular or special meeting of the Board at which a quorum has been established. In an election to fill the unexpired portion of any term, where the number of Directors qualified to vote is less than a quorum, the unexpired portion of any term shall be filled by a vote of a majority of the remaining Directors at any regular or special meeting of the Board.

5.10 **Resignation.** Any director may resign at any time by giving 30 days prior written notice to the Chair of the Board. This 30-day period may be waived by the Board for good cause shown. Unless a longer period is specified in the written notice, or the Board waives the 30-day requirement for good cause, such resignation shall take effect 30 days after the Board Chair's receipt of such notice. Acceptance of the tendered resignation shall not be necessary to make it effective.

5.11 **Removal.** Any Director may be removed from the Board, with or without cause, at any time by an affirmative vote of a majority of the Directors who are present at a regular or special meeting at which a quorum has been established. The Director being removed shall abstain from the vote due to the inherent conflict of interest, and may not be used in calculating the majority vote. The Director being removed can be counted for purposes of establishing a quorum. Any Director who is absent for more than 40% of the Board's meetings within any 12-month period shall be removed automatically, unless good cause is presented to the Board and the Board takes affirmative action to rescind the automatic removal.

5.12 **Director's Compensation.** The Corporation shall not compensate any Director for their services in their capacity as Director. By resolution of the Board, a fixed reasonable sum of expense for attendance at regular or special meetings of the Board.; provided, that nothing herein contained shall be construed to prevent any person as a Director from also serving as an Officer, employee, or independent contractor of the Corporation and receiving compensation in that capacity.

5.13 **Full Time Services Not Required.** A Director is not required to spend his or her full time or any specific amount of time managing the Corporation's business. Directors shall generally make themselves available for Board meetings and reasonable periods to fulfill his or her obligation to the Board.

5.14 **Conflicts of Interest.** The Board shall adopt a conflict of interest policy (the "Policy") to be followed by the Directors of the Board in executing their duties. The Policy shall provide for the disclosure of any duality interest or possible conflict of interest on the party of any Director and said disclosure shall be made part of the record of the meeting where the disclosure is made. The Policy shall be provided to all Directors before they shall become eligible to vote on Board action. No Director having a conflict of interest or possible conflict of interest for a particular issue shall vote or use his or her personal influence relating to such issue. If the Board chooses to vote on an action where a Director or Directors have abstained due to conflict of interest, the Secretary shall record in the minutes, the Conflict that was disclosed, that the Director abstained from voting and discussion of the action, and any other relevant factors deemed necessary by the Board.

5.15 **Committees.** The Board, by resolution or as set forth in these Bylaws, may from time to time, designate from among the Directors and nonmembers of the Board such committees as the Board may deem desirable. Each Committee may consist of one or more Directors with such powers and authority as may be provided in such a resolution so long as it is permitted by law. No standing Committee, advisory board, special or other Committee shall have any general power or authority over the Corporation, or the school it operates, but only such limited scope and power as specifically designated by the Board or these Bylaws. The Board shall consider recommendations and advice from Committees, but shall have no obligation to implement or follow the recommendation. Each Committee shall serve at the pleasure of the Board.

## ARTICLE VI ADVISORY COUNCIL

6.1 **Establishment.** The Advisory Council is established by the Board as a standing Committee pursuant to Section 5.15 of these Bylaws and shall be known as the Advisory Council.

6.2 **Duty and Powers.** The Advisory Council's duties and powers shall be limited in scope as specifically designated by the Board. At a minimum, the Advisory Council shall be responsible for making recommendations to the Board regarding the needs of the Community in which the Corporation is operating, establishing community relationships, planning and attending community events, reviewing matters related to the Corporation and the charter school(s) it operates and making recommendations as requested by the Board, and developing a pool of qualified candidates for Board Directorships.

6.3 **Number and Election of Members.** The number of Members of the Advisory Council shall be no less than five and no more than eleven, as determined by the Advisory Council. Members shall be appointed by the Board. The Vice-Chair of the Board shall also serve on the Advisory Council. The Advisory Council shall annually make recommendations to the Board for new Advisory Council members.

6.4 **Term of Office.** Each Member shall hold office for a period of two years from the date he or she is elected, qualified, and accepts the appointment, or until his or her prior death, incapacitation, resignation, replacement or removal. Members may serve multiple terms, including consecutive terms, without restriction as to the number of terms permitted.

6.5 **Qualifications.** Members of the Advisory Council shall meet the same requirements as a Director, except that no prior Advisory Council service shall be required.

6.6 **Resignation and Removal.** Any Member may resign from the Advisory Council by providing written notice of such resignation to the Chair of the Advisory Council, who shall provide such notice to the Board immediately upon receipt. The resignation shall be effective upon receipt unless some other effective date. Any Member may be removed from the Advisory Council, with or without cause, by the Board.

6.7 **Meeting of the Advisory Council.** The Advisory Council shall meet no less than four times each fiscal year. Notice and conduct of Meetings of the Advisory Council shall comply with Section VII of these Bylaws and any state regulatory requirements for Committees of the Board, including, but not limited to Indiana's Open Meeting Law.

## ARTICLE VII MEETINGS OF THE BOARD

7.1 **Regular Meetings of the Board.** The Board shall have regular meetings of the Board as set forth by resolution of the Board.

7.2 **Special Meetings of the Board.** Special meetings of the Board may be called at any time by the Chair of the Board and shall be called by the Secretary of the Board at the combined written request of Directors comprising 25 percent or more of the directors serving on the Board, or as otherwise required under the provisions of applicable law.

7.3 **Place of Meeting.** All meetings of the Board shall be held at the place identified on the notice for each meeting, whether within or outside the State of Indiana.

7.4 **Notice of Meetings.** Notice of the date, time, and place of any meetings, executive session, or any rescheduled meeting shall be posted 48 hours in advance of said meetings. The notice shall be posted at the principal office or agency and/or the place where the meeting will take place. Each Director shall be given 48 hours notice of any meeting of the Board. Such notice shall be delivered personally, by United States postal mail, overnight express mail, electronic mail or facsimile. Such notice shall be directed to each Director at his or her address, email address or facsimile number as it appears on the records of the Corporation. Notice is deemed to have been given: (i) upon the date that the notice is personally delivered, electronically mailed or transmitted by facsimile; (ii) one day after deposit in overnight, express mail; and (iii) three days after deposit in United States postal mail, properly addressed or transmitted. Notice of an adjourned meeting need not be given if the date, time and place of the adjourned meeting are provided at the meeting at which the adjournment is taken and if the adjournment does not exceed 61 days.

7.5 **Waiver of Notice.** Attendance of a Director at a meeting shall constitute a waiver of notice of such meeting, except, in the case of a Director, whose attendance at the meeting is for the express purpose of objecting to the transaction of any business because the meeting is not lawfully called or convened. Any Director may waive notice of any meeting of the Board by executing a written waiver of notice either before, at or after the time of the meeting.

7.6 **Presiding at Meetings.** At all meetings of the Board, the Chair of the Board shall preside. In the absence of the Chair, the Vice-Chair shall preside. In the absence of the Vice-Chair, the Secretary shall preside. In the

absence of the Chair, the Vice- Chair and the Secretary, an alternate Director appointed in writing by the Chair, at or prior to the meeting, shall preside until the Chair returns.

7.7 **Conduct of Meeting.** The proceedings of Board meetings shall be conducted in accordance with the latest edition of Roberts Rules of Order, as modified by the Board, when not in conflict with Indiana State law, the Articles of Incorporation or these Bylaws. The meeting shall be conducted substantially in accordance with an agenda prepared by the Chair of the Board or his or her designee. The Director presiding over the meeting shall have the right to limit discussion on any particular item and to establish procedures and provide reasonable time limits for any party wishing to speak.

7.8 **Quorum.** A simple majority of the Directors then in office shall constitute a quorum at any meeting of the Board. A Director shall be deemed present at a meeting if the Director attends in person, telephonically or electronically, so long as all Directors can communicate adequately throughout the meeting. Business may be conducted once a quorum is present and may continue until adjournment of the meeting notwithstanding the withdrawal or temporary absence of Directors sufficient to reduce the number present to less than a quorum. If, however, the Directors present are less than required to constitute a quorum, the affirmative vote must be such as would constitute a majority if a quorum were present, and provided further that the affirmative vote of a majority of the Directors then present is sufficient in all cases to adjourn a meeting.

7.9 **Acts of the Board.** When a Quorum is present as described in Section 6.8. of these Bylaws, the vote of the majority of Directors present shall be the act of the Board, unless the question upon which, by express provision of law, the Articles of Incorporation, or these By-Laws, a different vote is required in which case such provisions, or applicable law shall control.

7.10. **Meeting Minutes.** A written record of the discussions and decisions reached at each meeting of the Board in form of minutes shall be made, and shall be made part of the record of the Corporation.

7.11 **Indiana Open Door Law.** Provided that the Indiana's open meeting law (I.C. § 5-14-1.5 et seq) applies to Corporation, all deliberations and official actions of the Board shall take place at a meeting open to the public in compliance with the State's open meeting law, except in cases where, and to the extent, executive sessions are authorized by Indiana State law. Additionally, for so long as the State's open meeting law applies to Corporation, public notice of all meetings of the Board, and of all committees and advisory boards authorized by the Board, shall be given pursuant to and as required by the State's open meeting law.

7.12 **Proxy Voting.** Proxy voting shall not be permitted.

## ARTICLE VIII CORPORATE OFFICERS

8.1 **Corporate Officers Distinguished from Board Offices.** Section 5.7 these Bylaws establishes certain Board level offices. These offices must be filled by Directors and are purely ministerial in nature, dealing solely with the functioning of the Board. These board-level offices are not to be confused with *corporate "Officers"* that are appointed by the Board to direct and manage the operations of the Corporation's business. Article V of these Bylaws addresses board-level offices. This Article VIII addresses corporate Officers.

8.2 **Dual Capacity Officers.** By resolution of the Board (which may be altered or rescinded by the Board at any time), the Board may combine the Board officers and corporate Officers into dual-capacity positions. In such an event, the Chair of the Board shall also serve as the corporate President, the Secretary of the Board shall also serve as the corporate Secretary and so forth. If the Board resolves to use dual-capacity Officers, all of the provisions of Article V and this Article VIII shall apply to such dual-capacity Officers, and, in the event of a conflict between the two Articles, Article V shall control.

8.3 **Designation of Titles: Appointment.** The Officers of the Corporation shall comprise a corporate President, a corporate Vice-President, a corporate Secretary, a corporate Treasurer and may include one or more vice presidents, treasurers and such other Officers as the Board may from time to time deem appropriate. All Officers shall have

the authority and shall perform the duties prescribed in these Bylaws or as subsequently prescribed, from time to time, by the Board. Any two or more offices may be held by the same person. All the Officers of the Corporation shall be appointed by the Board at a regular or special meeting of the Board. Each Officer shall serve at the pleasure of the Board and shall hold office until such time as the Board removes or replaces such Officer, or until his or her death, incapacitation or resignation.

**8.4 Compensation.** Officers' compensation shall be fixed from time to time by the Board, and no Officer shall be prevented from receiving such compensation by reason of the fact that he or she is also a Director. The salaries of the Officers or the rate by which salaries are fixed shall be set forth in the minutes of the meetings of the Board.

**8.5 Resignation.** Any Officer may resign at any time by giving the written notice of resignation required by such Officer's employment agreement or, if not addressed in an employment agreement, 30-days prior written notice of such resignation to the Board. Unless otherwise specified in such written notice and accepted by the Board, such resignation shall be effective 30 days after receipt of such notice by the Corporation, and the acceptance of such resignation shall not be necessary to make it effective. Notwithstanding the foregoing, the Board, in its discretion, may make such resignation effective at any time prior to the expiration of the required notice period.

**8.6 Removal: Termination.** Subject to any effective and enforceable employment agreement between the Corporation and such Officer, any Officer may be removed from office, with or without cause, at any time by a resolution of the Board.

**8.7 Vacancies.** A vacancy in any Officer position, by reason of death, incapacitation, resignation, termination or any other cause whatsoever, may be immediately filled, at any time, by the Board at any regular or special meeting of the Board.

**8.8 Duties of Officers.**

**8.8.1 Corporate President.** The corporate President shall be the chief executive officer of the Corporation, serving at the pleasure of the Board, and shall act as the operating and directing head of the Corporation, having general charge of the Corporation's business and supervision of its affairs. Subject to policies established by the Board, he or she shall sign all contracts and agreements requiring execution on behalf of the Corporation and required for the ordinary, day-to-day operations of the Corporation. The President shall keep the Board fully informed as to the business and operations of the Corporation. In addition to the powers and duties elsewhere provided in these Bylaws, when duly authorized by the Board to do so, the President shall sign all deeds, liens, guarantees, licenses and other instruments of a special nature. The President shall also have such other powers and duties as are expressly delegated to the President by the Board in writing.

**8.8.2 Corporate Vice President.** There shall be as many corporate vice presidents as shall be determined by the Board from time to time, and they shall perform such duties as from time to time may be assigned to them by the Board or the corporate President. Such corporate vice president(s), if any, shall familiarize themselves with the affairs of the Corporation and, as authorized by the Board, any one of the corporate vice presidents shall have all the powers and perform all the duties of the corporate President in case of the temporary absence of the corporate President or in the case of his or her temporary inability to act. In case of the permanent absence or inability of the corporate President to act, the office shall be declared vacant by the Board and a successor chosen and appointed by the Board. The corporate vice president(s) shall have such other powers and duties as are expressly delegated to them by the Board in writing.

**8.8.3 Corporate Secretary.** The corporate Secretary shall: see that the minutes of all meetings of the Board and of any standing committees are kept in the corporate records; be the custodian of the corporate seal and shall determine when to affix it to any proper instrument; give or cause to be given required notices of all meetings of the Board; have charge of all the books and records of the Corporation except the books of account; and in general perform all the duties incident to the office of the secretary of a corporation and such other duties as may be assigned by the corporate President or the Board. The corporate Secretary shall attest by signature to all instruments duly authorized and requiring the same. The corporate Secretary shall have such other powers and duties as are expressly delegated to him or her by the Board in writing.

**8.8.4 Corporate Treasurer.** The corporate Treasurer shall: have general custody of all the funds and securities of the Corporation, except such as may be required by law or agreement to be deposited with any state official, trustee or escrow officer; see to the deposit of the funds of the Corporation in such bank or banks as the Board may designate; maintain, or cause to be maintained, direct and supervise regular books of account; render financial statements to the corporate President and the Board at proper times; and direct and supervise the preparation and filing of such reports, audits, financial statements and returns as may be required by law. The corporate Treasurer shall have such other powers and duties as are expressly delegated to him or her by the Board in writing.

**8.8.5 Assistant Secretaries: Assistant Treasurers.** The Board may, from time to time, fix the number of assistant secretaries or assistant treasurers and determine their respective duties and functions.

**8.9 Fidelity Bonds.** If required by the Board, any Director, Officer, employee or agent of the Corporation shall execute to the Corporation a fidelity bond in such amount, and with such surety or sureties as the Board may direct, conditioned upon the very faithful performance of his or her duties to the Corporation, including responsibility for negligence and for the accounting for all property, funds or securities of the Corporation which may come into his or her hands or control. The premium for any such fidelity bonds shall be paid by the Corporation as an operating expense.

## **ARTICLE IX SCHOOL DIRECTORS**

**9.1 Appointment: Compensation.** The Board shall select and appoint a School Director for each respective charter school. School Directors shall have the authority prescribed, from time to time, by the Board and shall receive such compensation as the Board may direct.

**9.2 Duties.** School Directors shall carry out the policies established by, and shall be directly responsible to, the Board. School Directors will have general management of the artistic, academic and administrative operations of the charter school(s) and shall prescribe and direct the course of study, the discipline to be observed, assessment of student performance and shall be responsible for all required reporting to the State. School Directors shall: (i) prepare annual budgets for submission to the Board; (ii) for their respective charter school, employ and discharge all personnel, prescribe their duties and terms of employment and set their salaries within the minimum and maximum limits established by the Board; (iii) conduct annual reviews of all personnel at their respective charter school; and (iv) perform such other duties as may be prescribed by the Board.

**9.3 Regulatory Requirements.** School Directors must obtain State fingerprint clearance cards and satisfy other regulatory inquiries and requirements, as prescribed by Indiana law, federal law or other governmental agencies having proper regulatory authority over the affairs of the Corporation or its activities, as amended from time to time, which will include as a minimum, a law enforcement investigation showing that there exists no criminal record which could adversely affect the Corporation or its operations.

**9.4 Fidelity Bonds.** If required by the Board, each School Director shall execute to the Corporation a fidelity bond in such amount, and with such surety or sureties as the Board may direct, conditioned upon the very faithful performance of his or her duties to the Corporation, including responsibility for negligence and for the accounting for all property, funds or securities of the Corporation which may come into his or her hands or control. The premium for any such fidelity bonds shall be paid by the Corporation as an operating expense.

## **ARTICLE X INDEMNIFICATION OF DIRECTORS AND OFFICERS**

**10.1 Non-Liability for Debts.** The private property of the Directors, Officers and committee members shall be exempt from execution or the liability of any debts of the Corporation and no Director, Officer or committee member shall be liable or responsible for any debts or liabilities of the Corporation.

**10.2 Indemnification.** To the maximum extent permitted by law, the Corporation shall hold harmless and indemnify any person who was or is a party, or is threatened to be made a party, to any threatened, pending or completed action, suit or proceeding, whether civil, criminal, administrative, or investigative, including all appeals (other than an

action, suit or proceeding by or in the right of the Corporation), by reason of the fact that he or she is or was a Director, Officer or committee member of the Corporation (collectively, the "Indemnitee") against any and all liability and expenses incurred by the Indemnitee in connection with any threatened or actual proceeding or legal action resulting from the Indemnitee's service to the Corporation or to another entity at the Corporation's written request.

**10.2.1 Exclusions.** Except insofar as permitted by law, the Corporation shall not indemnify any Indemnitee under this Article X in connection with: (i) a proceeding by or in the right of the Corporation in which the Indemnitee was adjudged liable to the Corporation; (ii) any other proceeding charging the improper personal benefit to the Indemnitee, whether or not involving action in the Indemnitee's official capacity, in which the Indemnitee was adjudged liable on the basis that personal benefit was improperly received by the Indemnitee; or (iii) any circumstance where the indemnification would adversely affect the tax-exempt status of the Corporation, as determined by the Board in its sole discretion after consultation with legal counsel.

**10.3 Procedure.** The Indemnitee shall notify the Corporation promptly of the threat or commencement of any proceeding or legal action with respect to which the Indemnitee intends to seek indemnification. The Corporation shall be entitled to assume the Indemnitee's defense with counsel reasonably satisfactory to the Indemnitee, unless the Indemnitee provides the Corporation with an opinion of counsel reasonably concluding that there may be a conflict of interest between the Indemnitee and the Corporation in the defense of the proceeding or legal action. If the Corporation assumes the defense, the Corporation shall not be liable to the Indemnitee for legal or other expenses subsequently incurred by the Indemnitee.

**10.4 Settlement of Claims.** The Corporation shall not be obligated to indemnify the Indemnitee for any amounts incurred in settlement if settlement is made without the Corporation's prior written consent. The Corporation shall not enter into any settlement that would impose any penalty or limitation on the Indemnitee without the Indemnitee's prior written consent. Neither the Corporation nor the Indemnitee shall unreasonably withhold consent to any proposed settlement.

**10.5 Effect of Repeal.** In order that the Indemnitee may rely on the indemnification promised by this Article X, no repeal or amendment of this Article X shall reduce the right of the Indemnitee to payment of expenses or indemnification for acts of the Indemnitee taken before the date of such repeal or amendment.

## **ARTICLE XI FISCAL YEAR**

**11.1 Designation.** The fiscal year of the Corporation shall begin on July 1 and end on June 30.

## **ARTICLE XII CORPORATE SEAL**

**12.1 Form of Seal.** The corporate seal, if any, shall be in such form as shall be approved from time to time by the Board.

## **ARTICLE XIII BOOKS AND RECORDS**

**13.1 Requirements/Compliance.** The Corporation shall keep correct and complete books and records of account as required by Indiana State law and any regulatory agency having proper jurisdiction over the affairs and activities of the Corporation, and shall also keep minutes of the proceedings of the Board, and committees authorized by, or having any of the authority of the Board. All books and records of the Corporation may be inspected, for any proper purpose at any reasonable time, by: (i) any Director; (ii) the attorney for such Director; and (iii) as otherwise required by State law.

## **ARTICLE XIV PRIVATE INUREMENT**



14.1 **Prohibition Against Private Inurement.** No Director, Officer or employee of the Corporation, member of a committee of the Corporation, nor any other private individual shall: (i) receive at any time any of the net earnings or pecuniary profit of the Corporation, except that the Corporation can pay reasonable compensation for services rendered; provided, however, that compensation shall not be paid if such payment would constitute an act of self-dealing or would result in the termination of the Corporation's tax exempt status under Section 501(c)(3) of the Code; or (ii) be entitled to share in the distribution of any of the corporate assets in the event of the Corporation's dissolution. All Directors shall be deemed to have expressly consented and agreed that upon such dissolution or winding up of the Corporation's affairs, whether voluntary or involuntary, all of the Corporation's assets remaining after all debts have been satisfied shall be distributed exclusively to other tax-exempt corporations, as permitted by applicable law.

**ARTICLE XV  
NONDISCRIMINATION STATEMENT**

15.1 **Prohibition Against Discrimination.** No charter school operated by the Corporation shall discriminate on the basis of race, sex, age, national or ethnic origin or religion in the administration of its educational policies, admissions policies, athletic or other school-administered programs or employment policies.

**ARTICLE XVI  
AMENDMENTS TO BYLAWS**

16.1 **Amendments: Procedure.** The Board may repeal, alter, amend or restate these Bylaws, at any time, by a majority vote of the Directors at any regular or special meeting of the Board. Notwithstanding the foregoing, no alteration, amendment or restatement of these Bylaws may adversely affect the Corporation's nonprofit status, tax-exempt status under Section 501(c)(3) of the Code or this Article XVI, if such repeal, alteration, amendment or restatement would violate Indiana State law, the Articles of Incorporation or any agreement or obligation by which the Corporation is bound. Even if a repeal, alteration, amendment or restatement does not violate Indiana law, the Articles of Incorporation or any agreement or obligation by which the Corporation is bound, no repeal, alteration, amendment or restatement of these Bylaws may adversely affect the Corporation's nonprofit status, tax-exempt status under Section 501(c)(3) of the Code or this Article XVI except upon the unanimous vote of all the Directors.

**CERTIFICATION OF ADOPTION**

As the Secretary of the Board, I hereby certify that the foregoing Bylaws have been adopted as the Bylaws of the Corporation by its Board at a duly-convened meeting of the Board on 03 03, 2016, and that these Bylaws, as of the date of this Certificate, have not been repealed, altered, amended, restated or superseded, and remain in full force and effect.

DATED the 4 th day of MARCH, 2016

  
Secretary of the Board of Rosa Parks: A Challenge Foundation  
Academy, Inc.

**Supplemental Responses to Questions from Form 1023**

**PART IV: NARRATIVE DESCRIPTION OF YOUR ACTIVITIES**

*Question 1: Describe your past, present, and planned activities in a narrative.*

Rosa Parks: A Challenge Foundation Academy, Inc. (hereinafter referred to as “Rosa Parks”) is developing and submitting an application to the Indiana Charter School Board for a charter contract with the State of Indiana to operate a public charter school for children in grades Kindergarten through 8, pursuant to Indiana Code §20-24-1-1 et. Seq. As the development of the school is still in progress, Rosa Parks has not yet developed its marketing materials and information. Rosa Parks plans to solicit student enrollment in the communities and neighborhoods where the proposed charter school will operate and will prepare flyers, materials and a website in the future to explain the educational program at the school.

**PART V: COMPENSATION AND OTHER FINANCIAL ARRANGEMENTS**

*Question 2a: Two of the directors on the Board of Rosa Parks, Todd Relue and Keyon Whiteside, are appointed by TeamCFA Foundation, a charter school support organization that will provide support and financial support to Rosa Parks. Mr. Relue and Mr. Whiteside will serve as TeamCFA representatives on the Board of Rosa Parks. Jeannette Bray is a full-time employee of TeamCFA.*

*Question 3a: Officers and Directors: Names, qualifications, hours worked & duties*

All board members will serve in a voluntary capacity and each will devote approximately 5-10 hours per month in overseeing the operations of the charter school.

**Keyon Whiteside, Vice-Chair:** Keyon Whiteside currently serves as the Senior Developer for Willow Marketing Inc. As senior developer, Mr. Whiteside oversees the Digital Department, while being responsible for the department’s profitability and the management of its personnel. He also owns and operates his own I.T. Company, Creative I.T. His work includes custom software development, dynamic web applications, website creation, android mobile app development, Server administration, help desk, local & wide area networks. Mr. Whiteside has served on two charter school boards and such experience will provide guidance and support to this new charter school.

**Javier Barrera, Director:** Javier Barrera is an Indianapolis-based media strategist and social entrepreneur. His work focuses on exploring the intersection between marketing and urban education and their effect in identity formation. He is President and founder of Creative Agency, where he is engaged in strategy, design and storytelling. Mr. Barrera is also the Chairman and Program Director for Latino Youth Collective, a program that provides resources and opportunities for youth to engage in personal and community development through critical pedagogy, grassroots organizing and collective action. As a board member, Mr. Barrera will provide critical connections for the charter school with community programs and families.

**Todd G. Relue, Board Chair:** Todd Relue is the chair of the Education Law practice group at Plews Shadley Racher & Braun LLP. He concentrates his practice in the areas of education law, commercial real estate, and complex litigation. Mr. Relue regularly advises charter schools, private schools, and affiliated organizations on a variety of legal issues including charter approval, school formation, land acquisition,

Rosa Parks: A Challenge Foundation Academy, Inc.  
EIN #47-4834024

construction, leasing, governance, replication and expansion, sponsor relations, and sustainability. His expertise and experience with charter school will provide sustainable support and guidance to Rosa Parks.

Jeannette Bray, Board Secretary/Treasurer: Jeannette Bray is currently a TeamCFA Foundation Curriculum Coordinator, where she provides instructional training and guidance to charter school teachers and leaders. Ms. Bray has two Masters Degrees in Education Leadership and Administration, and Secondary Education and Teaching Credential. She has served students for more than 11 years in the educational field and will be able to assist the Board of Rosa Parks in the development and oversight of its academic program.

Charlie Garcia, Director: Charlie Garcia is the President of Kali Systems, LLC, an Indianapolis-based construction firm. He has served on several community boards, including multiple charter school boards such as Indianapolis Academy of Excellence: A Challenge Foundation Academy, Inc. and Avondale Meadows Academy, Inc. Mr. Garcia will provide experience in charter school start-up and facilities development as well as charter school governance.

*Question 5a:* Conflict of Interest policy

ANSWER: Rosa Parks' Conflict of Interest policy is stated in its Bylaws at Article 5.14 and the reference Policy (attached hereto as Exhibits 6 and 7). The Bylaws and Conflict of Interest Policy were adopted by majority vote of the Board of Directors on March 3, 2016.

PART VI: YOUR MEMBERS AND OTHER INDIVIDUALS AND ORGANIZATIONS THAT RECEIVE BENEFITS FROM YOU

*Question 1a:* In carrying out your exempt purposes, do you provide goods, services, or funds to individuals? If "Yes," describe each program that provides goods, services, or funds to individuals.

ANSWER: Rosa Parks will be a public school and will provide a high-quality, free public education to its students in grades K-8.

*Question 2:* Do any of your programs limit the provision of goods, services, or funds to a specific individual or group of specific individuals?

ANSWER: Our first year will provide instruction to students who are eligible to enroll in kindergarten through second grade, and we will ultimately grow into a K-8 facility. Enrollment is accepted on a first come, first served basis.

PART VIII: YOUR SPECIFIC ACTIVITIES

*Question #4a:* Description of Fundraising Program

ANSWER: Once open, Rosa Parks will have an ongoing fundraising campaign to cover miscellaneous costs, as the majority of our expenses will be met by state and local funding. Rosa Parks' board will engage in fundraising activities such as conducting local fundraisers and developing solicitations to promote school donations that assist with supporting the mission and purpose of the school.

Rosa Parks also plans to apply for some federal, state and foundation grant offerings that will benefit the school, its students and teachers and promote its educational purpose. Rosa Parks intends to utilize

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EIN #47-4834024

written, phone, email and in-person solicitations, federal and foundation grants, donations of real or personal property from private donors in its fundraising program.

*Question #4d:* List all states and local jurisdictions in which you conduct fundraising. For each state or local jurisdiction, specify whether you fundraise for your own organization, you fundraise for another organization, or whether another organization fundraises for you.

*ANSWER:* All fundraising done by Rosa Parks will be done locally in or from Indiana. Some granting agencies may be located outside the state of Indiana, but the grant application will be initiated in Indiana and on behalf of Rosa Parks. Rosa Parks will not fundraise for other organizations, but may allow other organizations to fundraise on its behalf, as long as those organizations are approved by the Board, are in keeping with Rosa Parks' mission, and do not affect Rosa Parks' tax-exempt status.

*Question #11:* Do you or will you accept contributions of: real property; conservation easements; closely held securities; intellectual property such as patents, trademarks, and copyrights; works of music or art; licenses; royalties; automobiles, boats, planes, or other vehicles; or collectibles of any type? If "Yes," describe each type of contribution, any conditions imposed by the donor on the contribution, and any agreements with the donor regarding contribution.

*ANSWER:* Rosa Parks may accept a real property donation for a permanent site for the school. It may also accept property that it may use for the operation of the school facility (for example school bus), or other property it may incorporate into its fundraising efforts, such as use in a fundraising auction. The Board of Rosa Parks will consider any conditions imposed by a donor before accepting a donation and will ensure that such conditions, if any, do not affect the tax exempt status of Rosa Parks.

#### **PART IX Financial Data**

*Question:* Statement of Revenue & Expenses: Item #23: Any expense not otherwise classified, such as program services (attach itemized list).

<b>Expense</b>	<b>2015-2016</b>	<b>2016-2017</b>	<b>2017-2018</b>
<b>Supplies and Resources</b>	\$6,975	\$297,640	\$158,633
<b>Printing/Newsletter/Annual Report Services</b>	\$500	\$1,200	\$1,236
<b>Internet/Telephone/Telecommunication Services</b>	\$2,000	\$7,200	\$7,416
<b>Insurance Costs</b>	-	\$15,000	\$15,450
<b>Travel</b>	\$1,500	\$1,500	\$1,545
<b>Postage</b>	\$500	\$1,500	\$1,545
<b>Food Service</b>	-	\$168,750	\$225,000
<b>Transportation</b>	-	\$76,100	\$16,100
<b>Other</b>	\$2,550	\$6,120	\$6,120
<b>Contingency</b>	-	\$214,859	\$292,418
<b>Charter School Board Administration Fee</b>	-	\$64,458	\$87,725
<b>Escrow account for closure</b>	-	-	\$10,000
<b>Totals</b>	<b>\$14,025</b>	<b>\$854,327</b>	<b>\$823,188</b>

**Schedule B**

SECTION I: OPERATIONAL INFORMATION

*Question 1b:* Is the primary function of your school the presentation of formal instruction? If “Yes,” describe your school in terms of whether it is an elementary, secondary, college, technical, or other type of school.

ANSWER: Rosa Parks will operate a public charter school for children in grades kindergarten through 8. In its first year of operation, Rosa Parks will open with kindergarten through second grade and add one grade level each year through eighth grade.

*Question 2b:* Are you a public school because you are operated wholly or predominantly from government funds or property? If “Yes,” explain how you are operated wholly or predominantly from government funds or property

ANSWER: Rosa Parks will receive almost all of its funding from Indiana State and local government funds through a charter contract with the Indiana Charter School Board. Rosa Park is in the processing of applying for its charter with the Indiana Charter School Board. The parties will execute a formal written contract upon approval of the application. A copy of a sample charter contract is attached as Exhibit 9.

**INDIANA CHARTER SCHOOL BOARD: CHARTER SCHOOL APPLICANT**  
**Statement of Assurances**

The charter school agrees to comply with all of the following provisions: *(Read and check)*

- 1. A resolution or motion has been adopted by the charter school applicant's governing body that authorizes the submission of this application, including all understanding and assurances contained herein, directing and authorizing the applicant's designated representative to act in connection with the application and to provide such additional information as required.
- 2. Recipients operate (or will operate if not yet open) a charter school in compliance with all federal and state laws, including Indiana Charter Schools Law as described in all relevant sections of IC § 20-24.
- 3. Recipients will, for the life of the charter, participate in all data reporting and evaluation activities as required by the Indiana Charter School Board (ICSB) and the Indiana Department of Education. See in particular IC § 20-20-8-3 and relevant sections of IC § 20-24.
- 4. Recipients will comply with all relevant federal laws including, but not limited to, the *Age Discrimination in Employment Act* of 1975, Title VI of the *Civil Rights Act* of 1964, Title IX of the *Education Amendments of 1972*, section 504 of the *Rehabilitation Act* of 1973, Part B of the *Individuals with Disabilities Education Act*, and section 427 of the *General Education Provision Act*.
- 5. Recipients will comply with all provisions of the Non regulatory Guidance—Public Charter Schools Program of the U.S. Department of Education, which includes the use of a lottery for enrollment if the charter school is oversubscribed, as well as with applicable Indiana law. See also relevant sections of IC § 20-24.
- 6. Recipients shall ensure that a student's records, and, if applicable, a student's individualized education program as defined at 20 U.S.C. § 1401(14) of the *Individuals with Disabilities Education Act*, will follow the student, in accordance with applicable federal and state law.
- 7. Recipients will comply with all provisions of the *No Child Left Behind Act*, including but not limited to, provisions on school prayer, the Boy Scouts of America Equal Access Act, the Armed Forces Recruiter Access to Students and Student Recruiting Information, the Unsafe School Choice Option, the Family Educational Rights and Privacy Act (FERPA) and assessments.
- 8. Recipients will operate with the organizer serving in the capacity of fiscal agent for the charter school and in compliance with generally accepted accounting principles.
- 9. Recipients will at all times maintain all necessary and appropriate insurance coverage.
- 10. Recipients will indemnify and hold harmless the ICSB, the Indiana Department of Education, the State of Indiana, all school corporations providing funds to the charter school (if applicable), and their officers, directors, agents and employees, and any successors and assigns from any and all liability, cause of action, or other injury or damage in any way relating to the charter school or its operation.

11. Recipients understand that the ICSB may revoke the charter if the ICSB deems that the recipient is not fulfilling the academic goals and/or fiscal management responsibilities outlined in the charter.

**Signature from Authorized Representative of the Charter School Applicant**

I, the undersigned, am an authorized representative of the charter school applicant and do hereby certify that the information submitted in this application is accurate and true to the best of my knowledge and belief. In addition, I do hereby certify to the assurances contained above.

**PRINT NAME & TITLE**

DeAnna Rowe, Regional Director  
Team CFA

**DATE**

3/11/16

**SIGN NAME**

*DeAnna Rowe*

## CHARTER SCHOOL BOARD MEMBER INFORMATION

*(To be completed individually by each proposed board member for the charter holder)*

Serving on a public charter school board is a position of public trust and fiduciary responsibility. As a board member of a public school, you are responsible for ensuring the quality of the school program, competent stewardship of public funds, and the school's fulfillment of its public obligations and all terms of its charter.

As part of the application for a new charter school, the Indiana Charter School Board requests that each prospective board member respond individually to this questionnaire. Where narrative responses are required, brief responses are sufficient.

The purpose of this questionnaire is twofold: 1) to give application reviewers a clearer introduction to the founding group behind each school proposal in advance of the applicant interview, in order to be better prepared for the interview; and 2) to encourage board members to reflect individually as well as collectively on their common mission, purposes, and obligations at the earliest stage of school development.

### Background

1. Name of charter school on whose Board of Directors you intend to serve:  
Rosa Parks: A Challenge Foundation Academy, Inc.
2. Your full name: Keyon Whiteside
3. Brief educational and employment history. (No narrative response is required if resume is attached.)  
 Resume is attached.
4. Describe any of your previous experiences that are relevant to serving on the charter school's board (including other board experience, or any experience overseeing start-up or entrepreneurial ventures). If you have not had previous experience of this nature, explain why you have the capability to be an effective board member.  
Currently serve on two Challenge Foundation Academy Boards, one in Indianapolis and one in North Carolina.
5. Do you understand the obligations of a charter school's Board of Directors to comply with Indiana's Public Access laws, including the Open Door Law for Board meetings?  
 Yes  Don't Know/ Unsure

### Disclosures

1. Indicate whether you or your spouse knows the other prospective board members for the proposed school. If so, please indicate the precise nature of your relationship.  
 I / we do not know any such trustees.  Yes, I am acquainted with Charlie Garcia and Todd Relue from other TeamCFA school boards and events.
2. Indicate whether you or your spouse knows anyone who is doing, or plans to do, business with the charter school (whether as an individual or as a director, officer, employee or agent of an entity). If so, indicate and describe the precise nature of your relationship and the nature of the business that such person or entity is transacting or will be transacting with the school.



- I / we do not know any such persons.  Yes, I serve as a TeamCFA representative on two Challenge Foundation Academies for TeamCFA Foundation, an entity that will provide charter school support services to the charter school.
3. Indicate if you, your spouse or other immediate family members anticipate conducting, or are conducting, any business with the school. If so, indicate the precise nature of the business that is being or will be conducted.  
 I / we do not anticipate conducting any such business.  Yes
4. If the school intends to contract with an Education Service Provider or management organization, indicate whether you or your spouse knows any employees, officers, owners, directors or agents of that provider. If the answer is in the affirmative, please describe any such relationship.  
 Not applicable because the school does not intend to contract with an education service provider or school management organization.  
 I / we do not know any such persons.  Yes, I serve as a TeamCFA representative on two Challenge Foundation Academies for TeamCFA Foundation.
5. If the school contracts with an education service provider, please indicate whether you, your spouse or other immediate family members have a direct or indirect ownership, employment, contractual or management interest in the provider. For any interest indicated, provide a detailed description.  
 N/A.  I / we have no such interest.  Yes, I serve as a TeamCFA representative on two Challenge Foundation Academies for TeamCFA Foundation.
6. If the school plans to contract with an Education Service Provider, indicate if you, your spouse or other immediate family member anticipate conducting, or are conducting, any business with the provider. If so, indicate the precise nature of the business that is being or will be conducted.  
 N/A.  I / we or my family do not anticipate conducting any such business.  Yes, I serve as a TeamCFA representative on two Challenge Foundation Academies for TeamCFA Foundation.
7. Indicate whether you, your spouse or other immediate family members are a director, officer, employee, partner or member of, or are otherwise associated with, any organization that is partnering with the charter school. To the extent you have provided this information in response to prior items, you may so indicate.  
 Does not apply to me, my spouse or family.  Yes, I serve as a TeamCFA representative on two Challenge Foundation Academies for TeamCFA Foundation.
8. Indicate any potential ethical or legal conflicts of interests that would, or are likely to, exist should you serve on the school's board.  None.  Yes

### Certification

I, Keyon Whiteside, certify to the best of my knowledge and ability that the information I am providing to the Indiana Charter School Board as a prospective board member for Rosa Parks: A Challenge Foundation Academy Charter School is true and correct in every respect.

Signature not available – a signed form will be provided at a later date.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

## CHARTER SCHOOL BOARD MEMBER INFORMATION

*(To be completed individually by each proposed board member for the charter holder)*

Serving on a public charter school board is a position of public trust and fiduciary responsibility. As a board member of a public school, you are responsible for ensuring the quality of the school program, competent stewardship of public funds, and the school's fulfillment of its public obligations and all terms of its charter.

As part of the application for a new charter school, the Indiana Charter School Board requests that each prospective board member respond individually to this questionnaire. Where narrative responses are required, brief responses are sufficient.

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### Background

1. Name of charter school on whose Board of Directors you intend to serve:

2. Your full name: Charles J. Garcia

3. Brief educational and employment history. (No narrative response is required if resume is attached.)

Resume is attached.

4. Describe any of your previous experiences that are relevant to serving on the charter school's board (including other board experience, or any experience overseeing start-up or entrepreneurial ventures). If you have not had previous experience of this nature, explain why you have the capability to be an effective board member.

Charles Garcia has over 10 year experience with Charter Schools and Education. Mr Garcia is currently Chairman of the Board of Avonlea Meadows Academy, Mr Garcia also is a Trustee at University of Indianapolis and IUPUI Tech Community College.

5. Do you understand the obligations of a charter school's Board of Directors to comply with Indiana's Public Access laws, including the Open Door Law for Board meetings?

Yes  Don't Know/ Unsure

### Disclosures

1. Indicate whether you or your spouse knows the other prospective board members for the proposed school. If so, please indicate the precise nature of your relationship.

I / we do not know any such trustees.  Yes

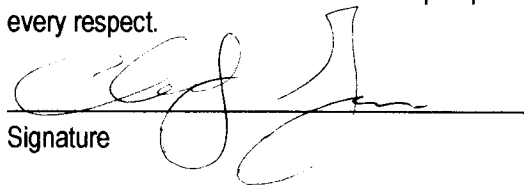
2. Indicate whether you or your spouse knows anyone who is doing, or plans to do, business with the charter school (whether as an individual or as a director, officer, employee or agent of an entity). If so, indicate and describe the precise nature of your relationship and the nature of the business that such person or entity is transacting or will be transacting with the school.

I / we do not know any such persons.  Yes

3. Indicate if you, your spouse or other immediate family members anticipate conducting, or are conducting, any business with the school. If so, indicate the precise nature of the business that is being or will be conducted.  
 I / we do not anticipate conducting any such business.  Yes
  
4. If the school intends to contract with an Education Service Provider or management organization, indicate whether you or your spouse knows any employees, officers, owners, directors or agents of that provider. If the answer is in the affirmative, please describe any such relationship.  
 Not applicable because the school does not intend to contract with an education service provider or school management organization.  
 I / we do not know any such persons.  Yes
  
5. If the school contracts with an education service provider, please indicate whether you, your spouse or other immediate family members have a direct or indirect ownership, employment, contractual or management interest in the provider. For any interest indicated, provide a detailed description.  
 N/A.  I / we have no such interest.  Yes
  
6. If the school plans to contract with an Education Service Provider, indicate if you, your spouse or other immediate family member anticipate conducting, or are conducting, any business with the provider. If so, indicate the precise nature of the business that is being or will be conducted.  
 N/A.  I / we or my family do not anticipate conducting any such business.  Yes
  
7. Indicate whether you, your spouse or other immediate family members are a director, officer, employee, partner or member of, or are otherwise associated with, any organization that is partnering with the charter school. To the extent you have provided this information in response to prior items, you may so indicate.  
 Does not apply to me, my spouse or family.  Yes
  
8. Indicate any potential ethical or legal conflicts of interests that would, or are likely to, exist should you serve on the school's board.  None.  Yes

**Certification**

I, \_\_\_\_\_, certify to the best of my knowledge and ability that the information I am providing to the Indiana Charter School Board as a prospective board member for \_\_\_\_\_ Charter School is true and correct in every respect.

Signature 

3/6/16  
Date

## CHARTER SCHOOL BOARD MEMBER INFORMATION

*(To be completed individually by each proposed board member for the charter holder)*

Serving on a public charter school board is a position of public trust and fiduciary responsibility. As a board member of a public school, you are responsible for ensuring the quality of the school program, competent stewardship of public funds, and the school's fulfillment of its public obligations and all terms of its charter.

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### Background

1. Name of charter school on whose Board of Directors you intend to serve:  
Rosa Parks: A Challenge Foundation Academy
2. Your full name: Javier Barrera Cervantes
3. Brief educational and employment history. (No narrative response is required if resume is attached.)  
 Resume is attached.
4. Describe any of your previous experiences that are relevant to serving on the charter school's board (including other board experience, or any experience overseeing start-up or entrepreneurial ventures). If you have not had previous experience of this nature, explain why you have the capability to be an effective board member.  
I am founding member of the Latino Youth Collective, a program that provides resources and opportunities for youth to engage in personal and community development through critical pedagogy, grassroots organizing and collective action. My involvement with this organization has given me a strong understanding of the educational landscape in the city.  
I am also a founding board member of Crossroads MX, a chapter part of an international movement that was initiated in 2005 by the federal Mexican government through the Institute of Mexicans Living Abroad (IME), the National Council for Science and Technology (CONACYT) and the Mexico-United States Foundation for Science (FUMEC) with the aim of identifying and organizing highly-skilled Mexicans living abroad and inviting them to generate and collaborative in activities and projects that promote social, economic, scientific, technological and innovation development in Mexico and their communities.
5. Do you understand the obligations of a charter school's Board of Directors to comply with Indiana's Public Access laws, including the Open Door Law for Board meetings?  
 Yes  Don't Know/ Unsure

### Disclosures

1. Indicate whether you or your spouse knows the other prospective board members for the proposed school. If so, please indicate the precise nature of your relationship.  
 I / we do not know any such trustees.  Yes

2. Indicate whether you or your spouse knows anyone who is doing, or plans to do, business with the charter school (whether as an individual or as a director, officer, employee or agent of an entity). If so, indicate and describe the precise nature of your relationship and the nature of the business that such person or entity is transacting or will be transacting with the school.  
 I / we do not know any such persons.  Yes
  
3. Indicate if you, your spouse or other immediate family members anticipate conducting, or are conducting, any business with the school. If so, indicate the precise nature of the business that is being or will be conducted.  
 I / we do not anticipate conducting any such business.  Yes
  
4. If the school intends to contract with an Education Service Provider or management organization, indicate whether you or your spouse knows any employees, officers, owners, directors or agents of that provider. If the answer is in the affirmative, please describe any such relationship.  
 Not applicable because the school does not intend to contract with an education service provider or school management organization.  
 I / we do not know any such persons.  Yes
  
5. If the school contracts with an education service provider, please indicate whether you, your spouse or other immediate family members have a direct or indirect ownership, employment, contractual or management interest in the provider. For any interest indicated, provide a detailed description.  
 N/A.  I / we have no such interest.  Yes
  
6. If the school plans to contract with an Education Service Provider, indicate if you, your spouse or other immediate family member anticipate conducting, or are conducting, any business with the provider. If so, indicate the precise nature of the business that is being or will be conducted.  
 N/A.  I / we or my family do not anticipate conducting any such business.  Yes
  
7. Indicate whether you, your spouse or other immediate family members are a director, officer, employee, partner or member of, or are otherwise associated with, any organization that is partnering with the charter school. To the extent you have provided this information in response to prior items, you may so indicate.  
 Does not apply to me, my spouse or family.  Yes
  
8. Indicate any potential ethical or legal conflicts of interests that would, or are likely to, exist should you serve on the school's board.  None.  Yes

### Certification

I, Javier Barrera Cervantes, certify to the best of my knowledge and ability that the information I am providing to the Indiana Charter School Board as a prospective board member for Rosa Parks: A Challenge Foundation Academy Charter School is true and correct in every respect.

Signature



09/03/2016 \_\_\_\_\_  
Date

## CHARTER SCHOOL BOARD MEMBER INFORMATION

*(To be completed individually by each proposed board member for the charter holder)*

Serving on a public charter school board is a position of public trust and fiduciary responsibility. As a board member of a public school, you are responsible for ensuring the quality of the school program, competent stewardship of public funds, and the school's fulfillment of its public obligations and all terms of its charter.

As part of the application for a new charter school, the Indiana Charter School Board requests that each prospective board member respond individually to this questionnaire. Where narrative responses are required, brief responses are sufficient.

The purpose of this questionnaire is twofold: 1) to give application reviewers a clearer introduction to the founding group behind each school proposal in advance of the applicant interview, in order to be better prepared for the interview; and 2) to encourage board members to reflect individually as well as collectively on their common mission, purposes, and obligations at the earliest stage of school development.

### Background

1. Name of charter school on whose Board of Directors you intend to serve:  
Rosa Parks: A Challenge Foundation Academy
2. Your full name: Todd Gregory Relue
3. Brief educational and employment history. (No narrative response is required if resume is attached.)  
 Resume is attached.
4. Describe any of your previous experiences that are relevant to serving on the charter school's board (including other board experience, or any experience overseeing start-up or entrepreneurial ventures). If you have not had previous experience of this nature, explain why you have the capability to be an effective board member.  
I am the co-chair of the Education Law group at my firm, Plews Shadley Racher & Braun, LLP. I have advised both charter and private schools with regard to various legal issues for the past five years. I have been a member of the Board of Directors for Heritage Place of Indianapolis, Inc., a United Way agency, for five years and have served as President of that board for the past two years. I am an equity partner in my law firm and regularly make decisions that affect the operation of that business.
5. Do you understand the obligations of a charter school's Board of Directors to comply with Indiana's Public Access laws, including the Open Door Law for Board meetings?  
 Yes  Don't Know/ Unsure

### Disclosures

1. Indicate whether you or your spouse knows the other prospective board members for the proposed school. If so, please indicate the precise nature of your relationship.  
 I / we do not know any such trustees.  Yes

I am previously acquainted with Charlie Garcia and Keyon Whiteside from their work on the boards for other local charter schools including Avondale Meadows Academy and the Indianapolis Academy of Excellence.

2. Indicate whether you or your spouse knows anyone who is doing, or plans to do, business with the charter school (whether as an individual or as a director, officer, employee or agent of an entity). If so, indicate and describe the precise nature of your relationship and the nature of the business that such person or entity is transacting or will be transacting with the school.  
 I / we do not know any such persons.  Yes
  
3. Indicate if you, your spouse or other immediate family members anticipate conducting, or are conducting, any business with the school. If so, indicate the precise nature of the business that is being or will be conducted.  
 I / we do not anticipate conducting any such business.  Yes
  
4. If the school intends to contract with an Education Service Provider or management organization, indicate whether you or your spouse knows any employees, officers, owners, directors or agents of that provider. If the answer is in the affirmative, please describe any such relationship.  
 Not applicable because the school does not intend to contract with an education service provider or school management organization.  
 I / we do not know any such persons.  Yes
  
5. If the school contracts with an education service provider, please indicate whether you, your spouse or other immediate family members have a direct or indirect ownership, employment, contractual or management interest in the provider. For any interest indicated, provide a detailed description.  
 N/A.  I / we have no such interest.  Yes
  
6. If the school plans to contract with an Education Service Provider, indicate if you, your spouse or other immediate family member anticipate conducting, or are conducting, any business with the provider. If so, indicate the precise nature of the business that is being or will be conducted.  
 N/A.  I / we or my family do not anticipate conducting any such business.  Yes
  
7. Indicate whether you, your spouse or other immediate family members are a director, officer, employee, partner or member of, or are otherwise associated with, any organization that is partnering with the charter school. To the extent you have provided this information in response to prior items, you may so indicate.  
 Does not apply to me, my spouse or family.  Yes
  
8. Indicate any potential ethical or legal conflicts of interests that would, or are likely to, exist should you serve on the school's board.  None.  Yes

**Certification**

I, Todd Gregory Relue, certify to the best of my knowledge and ability that the information I am providing to the Indiana Charter School Board as a prospective board member for Rosa Parks: A Challenge Foundation Academy Charter School is true and correct in every respect.

  
 \_\_\_\_\_  
 Signature

3/10/2010  
 \_\_\_\_\_  
 Date

## CHARTER SCHOOL BOARD MEMBER INFORMATION

*(To be completed individually by each proposed board member for the charter holder)*

Serving on a public charter school board is a position of public trust and fiduciary responsibility. As a board member of a public school, you are responsible for ensuring the quality of the school program, competent stewardship of public funds, and the school's fulfillment of its public obligations and all terms of its charter.

As part of the application for a new charter school, the Indiana Charter School Board requests that each prospective board member respond individually to this questionnaire. Where narrative responses are required, brief responses are sufficient.

The purpose of this questionnaire is twofold: 1) to give application reviewers a clearer introduction to the founding group behind each school proposal in advance of the applicant interview, in order to be better prepared for the interview; and 2) to encourage board members to reflect individually as well as collectively on their common mission, purposes, and obligations at the earliest stage of school development.

### Background

1. Name of charter school on whose Board of Directors you intend to serve:  
Rosa Parks: A Challenge Foundation Academy, Inc.
2. Your full name: Jeannette Bray
3. Brief educational and employment history. (No narrative response is required if resume is attached.)  
 Resume is attached.
4. Describe any of your previous experiences that are relevant to serving on the charter school's board (including other board experience, or any experience overseeing start-up or entrepreneurial ventures). If you have not had previous experience of this nature, explain why you have the capability to be an effective board member.  
15 years experience in education including experience as a charter school director.
5. Do you understand the obligations of a charter school's Board of Directors to comply with Indiana's Public Access laws, including the Open Door Law for Board meetings?  
 Yes  Don't Know/ Unsure

### Disclosures

1. Indicate whether you or your spouse knows the other prospective board members for the proposed school. If so, please indicate the precise nature of your relationship.  
 I / we do not know any such trustees.  Yes
2. Indicate whether you or your spouse knows anyone who is doing, or plans to do, business with the charter school (whether as an individual or as a director, officer, employee or agent of an entity). If so, indicate and describe the precise nature of your relationship and the nature of the business that such person or entity is transacting or will be transacting with the school.  
 I / we do not know any such persons.  Yes I am an employee of TeamCFA Foundation, an entity that will provide charter school support services to the charter school.

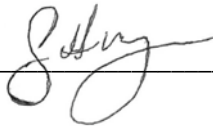


3. Indicate if you, your spouse or other immediate family members anticipate conducting, or are conducting, any business with the school. If so, indicate the precise nature of the business that is being or will be conducted.  
 I / we do not anticipate conducting any such business.  Yes
4. If the school intends to contract with an Education Service Provider or management organization, indicate whether you or your spouse knows any employees, officers, owners, directors or agents of that provider. If the answer is in the affirmative, please describe any such relationship.  
 Not applicable because the school does not intend to contract with an education service provider or school management organization.  
 I / we do not know any such persons.  Yes, I am an employee of TeamCFA Foundation.
5. If the school contracts with an education service provider, please indicate whether you, your spouse or other immediate family members have a direct or indirect ownership, employment, contractual or management interest in the provider. For any interest indicated, provide a detailed description.  
 N/A.  I / we have no such interest.  Yes, I am an employee of TeamCFA Foundation.
6. If the school plans to contract with an Education Service Provider, indicate if you, your spouse or other immediate family member anticipate conducting, or are conducting, any business with the provider. If so, indicate the precise nature of the business that is being or will be conducted.  
 N/A.  I / we or my family do not anticipate conducting any such business.  Yes, I am an employee of TeamCFA Foundation.
7. Indicate whether you, your spouse or other immediate family members are a director, officer, employee, partner or member of, or are otherwise associated with, any organization that is partnering with the charter school. To the extent you have provided this information in response to prior items, you may so indicate.  
 Does not apply to me, my spouse or family.  Yes, I am an employee of TeamCFA Foundation.
8. Indicate any potential ethical or legal conflicts of interests that would, or are likely to, exist should you serve on the school's board.  None.  Yes
- 

#### Certification

I, Jeannette Bray, certify to the best of my knowledge and ability that the information I am providing to the Indiana Charter School Board as a prospective board member for Rosa Parks: A Challenge Foundation Academy Charter School is true and correct in every respect.

Signature



3/11/16

Date

**Rosa Parks: A Challenge Foundation Academy, Inc.**  
**Board of Directors**  
**Code of Ethics**

The governing board of Rosa Parks: A Challenge Foundation Academy, Inc. is guided by principles that create a strong academic and fiscally responsible culture. These core beliefs are designed to guide the board of directors in the decisions made to ensure high academic standards, champion free-market principles, create a financially sustainable cost effective school, and provide effective oversight.

1. The board will strive to make decisions that produce a culture of young American citizens who are prepared to be intelligent and engaged members of their communities.

2. The board will maintain policies and practices that identify and properly compensate the many professionals who are developing our next generation of Americans.

3. The board will maintain a financial plan that recognizes the need to be responsible with taxpayer dollars.

4. The board is committed to transparency and will allow all stakeholders to participate and review procedures, policies, and actions discussed and adopted by the board.

The governing board will adhere to the ethics and standards of good practice in the following ways:

1. Uphold and enforce all laws, rules and regulations of the State Board of Education and court orders pertaining to schools.
2. Make decisions in terms of the educational welfare of children and will seek to develop and maintain that the school meets the individual needs of all children regardless of their ability, race, creed, sex, or social standing.
3. Carry out responsibility, not to administer the schools, but, together with fellow board members, to see that the school is well run.
4. Recognize that authority rests with the board of directors as a whole and will make no personal promises nor take any private action that may compromise the board.
5. Support and protect school personnel in proper performance of their duties.
6. Encourage and support innovation and creativity in the school's programs and operations.
7. Fulfill the fiduciary responsibility for sound budgetary and fiscal management by reviewing financial reports, asking questions, and providing direction to the School Director.

**Rosa Parks: A Challenge Foundation Academy, Inc.  
Conflict of Interest Policy**

**Article I  
Purpose**

The purpose of the conflict of interest policy is to protect Rosa Parks: A Challenge Foundation Academy, Inc.'s ("RP: CFA") interest when it is contemplating entering into a transaction or arrangement that might benefit the private interest of an officer or director of RP: CFA or might result in a possible excess benefit transaction and; to provide guidance on how to approve or disapprove a transaction that may be in the best interest of the organization. This policy is intended to supplement but not replace any applicable state and federal laws governing conflicts of interest applicable to nonprofit and charitable organizations.

**Article II  
Definitions**

1. Interested Person.  
Any director, principal officer, or member of a committee with governing board delegated powers, who has a direct or indirect financial interest, as defined below, is an interested person.
  
2. Financial Interest.  
A person has a financial interest if the person has, directly or indirectly, through business, investment, or family:
  - a. An ownership or investment interest in any entity with which RP: CFA has a transaction or arrangement,
  - b. A compensation arrangement with RP: CFA or with any entity or individual with which RP: CFA has a transaction or arrangement, or
  - c. A potential ownership or investment interest in, or compensation arrangement with, any entity or individual with which RP: CFA is negotiating a transaction or arrangement.

*Compensation includes direct and indirect remuneration as well as gifts or favors that are not insubstantial.*

A financial interest is not necessarily a conflict of interest. Under Article III, Section 2, a person who has a financial interest may have a conflict of interest only if the appropriate governing board or committee decides that a conflict of interest exists.

**Article III  
Procedures**

1. Duty to Disclose.  
In connection with any actual or possible conflict of interest, an interested person must disclose the existence of the financial interest and be given the opportunity to disclose all material facts to the directors and members of committees with governing board delegated powers considering the proposed transaction or arrangement.

2. Determining Whether a Conflict of Interest Exists.  
After disclosure of the financial interest and all material facts, and after any discussion with the interested person, he/she shall leave the governing board or committee meeting while the determination of a conflict of interest is discussed and voted upon. The remaining board or committee members shall decide if a conflict of interest exists.
3. Procedures for Addressing the Conflict of Interest.
  - a. An interested person may make a presentation at the governing board or committee meeting, but after the presentation, he/she shall leave the meeting during the discussion of, and the vote on, the transaction or arrangement involving the possible conflict of interest.
  - b. The interested person shall not attempt to exert his or her personal influence with respect to the matter, either at or outside the meeting.
  - c. The chairperson of the governing board or committee shall, if appropriate, appoint a disinterested person or committee to investigate alternatives to the proposed transaction or arrangement.
  - d. After exercising due diligence, the governing board or committee shall determine whether RP: CFA can obtain with reasonable efforts a more advantageous transaction or arrangement from a person or entity that would not give rise to a conflict of interest.
  - e. If a more advantageous transaction or arrangement is not reasonably possible under circumstances not producing a conflict of interest, the governing board or committee shall determine by a majority vote of the disinterested directors whether the transaction or arrangement is in RP: CFA's best interest, for its own benefit, and whether it is fair and reasonable. In conformity with the above determination it shall make its decision as to whether to enter into the transaction or arrangement.
4. Violations of the Conflicts of Interest Policy.
  - a. If the governing board or committee has reasonable cause to believe a member has failed to disclose actual or possible conflicts of interest, it shall inform the member of the basis for such belief and afford the member an opportunity to explain the alleged failure to disclose.
  - b. If, after hearing the member's response and after making further investigation as warranted by the circumstances, the governing board or committee determines the member has failed to disclose an actual or possible conflict of interest, it shall take appropriate disciplinary and corrective action.

#### **Article IV Records of Proceedings**

The minutes of the governing board and all committees with board delegated powers shall contain:

- a. The names of the persons who disclosed or otherwise were found to have a financial interest in connection with an actual or possible conflict of interest, the nature of the financial interest, any action taken to determine whether a conflict of interest was present,

and the governing board's or committee's decision as to whether a conflict of interest in fact existed.

b. The names of the persons who were present for discussions and votes relating to the transaction or arrangement, the content of the discussion, including any alternatives to the proposed transaction or arrangement, and a record of any votes taken in connection with the proceedings.

#### **Article V Compensation**

The Directors and Officers of the RP: CFA shall serve without compensation.

#### **Article VI Annual Statements**

Each director, principal officer and member of a committee with governing board delegated powers shall annually sign a statement which affirms such person:

- a. Has received a copy of the conflicts of interest policy,
- b. Has read and understands the policy,
- c. Has agreed to comply with the policy, and
- d. Understands RP: CFA is charitable and in order to maintain its federal tax exemption it must engage primarily in activities which accomplish one or more of its tax-exempt purposes.

#### **Article VII Periodic Reviews**

To ensure RP: CFA operates in a manner consistent with charitable purposes and does not engage in activities that could jeopardize its tax-exempt status, periodic reviews shall be conducted. The periodic reviews shall, at a minimum, include the following subjects:

- a. Whether compensation arrangements and benefits are reasonable, based on competent survey information, and the result of arm's length bargaining.
- b. Whether partnerships, joint ventures, and arrangements with management organizations conform to RP: CFA's written policies, are properly recorded, reflect reasonable investment or payments for goods and services, further charitable purposes and do not result in inurement, impermissible private benefit or in an excess benefit transaction.

#### **Article VIII Use of Outside Experts**

When conducting the periodic reviews as provided for in Article VII, RP: CFA may, but need not, use outside advisors. If outside experts are used, their use shall not relieve the governing board of its responsibility for ensuring periodic reviews are conducted.

**Rosa Parks: A Challenge Foundation Academy**

**Director and Officer Annual Conflict of Interest Statement**

1. Name: \_\_\_\_\_ Date: \_\_\_\_\_

2. Position: \_\_\_\_\_

Are you a voting Director?  Yes or  No

Are you an Officer?  Yes or  No

If you are an Officer, which Officer position do you hold: \_\_\_\_\_.

3. I affirm the following:

- I have received a copy of the RP: CFA Conflict of Interest Policy. \_\_\_\_\_ (initial)
- I have read and understand the policy. \_\_\_\_\_ (initial)
- I agree to comply with the policy. \_\_\_\_\_ (initial)
- I understand that RP: CFA is charitable and in order to maintain its federal tax exemption it must engage primarily in activities which accomplish one or more of tax-exempt purposes. \_\_\_\_\_ (initial)

4. Disclosures:

a. Do you have a financial interest (current or potential), including a compensation arrangement, as defined in the Conflict of Interest policy with RP: CFA?  Yes or  No

i. If yes, please describe it:

\_\_\_\_\_  
ii. If yes, has the financial interest been disclosed, as provided in the Conflict of Interest policy?  Yes or  No

b. In the past, have you had a financial interest, including a compensation arrangement, as defined in the Conflict of Interest policy with RP: CFA?  Yes or  No

i. If yes, please describe it, including when (approximately):

\_\_\_\_\_  
ii. If yes, has the financial interest been disclosed, as provided in the Conflict of Interest policy?  Yes or  No

\_\_\_\_\_  
Signature of Director Date: \_\_\_\_\_

## Attachment 8

John and Martha Bryan began the Challenge Foundation in 1989 to support educational initiatives that make it possible for every American child to attain a high school education that produces literate, factually aware, and thinking graduates second to none in the world. Through the experience gained from evaluating schools and educational ideas, Mr. and Mrs. Bryan realized that they could make a bigger impact on the education of America by starting a network of public charter schools. In 2008, TeamCFA Foundation was founded with the mission to support the development of academically rigorous, financially sustainable TeamCFA charter schools by employing proven business, academic and governance practices and leveraging the free market to support the broader school choice movement. Today, TeamCFA's network comprises 15 Challenge Foundation Academies (CFAs) in Indiana, North Carolina and Arizona. TeamCFA is governed by a seven-member Board of Directors and its leadership includes Chief Operating Officer Anthony Helton; Chief Legal Officer Tracy Banker; Controller Tisha Crisler; Regional Director DeAnna Rowe (Southwest and Interim Midwest Regions); Director of Leadership Development and School Support Jack Rowe; and Director of Advancement Jill Burleson.

TeamCFA Foundation is initiating this application and requesting approval from the Indiana Charter School Board. TeamCFA will be providing the school design, corporate establishment, and school start up oversight.

The TeamCFA network's historical data demonstrates TeamCFA's ability to provide a quality academic program. For schools that have been in the TeamCFA network for three years or more, the TeamCFA network has seen student growth on the NWEA MAP assessments rise dramatically each year the schools are in the network. We know with growth, proficiency will come. TeamCFA established schools demonstrate an average proficiency rate on the NWEA MAP test of 77.4% in math and 80.2% in reading. This increase in growth and proficiency is derived from not only the curriculum, but also from highly trained, well qualified teachers and administrators who are dedicated to ensuring the students master the skills introduced at every grade level.

Since TeamCFA Foundation is initiating its own network school in this case, no other ESPs were considered.

Each school will enter into an Affiliate School Agreement with TeamCFA Foundation. A sample copy of the current TeamCFA Affiliate School Agreement is included with this Attachment 8.

See Sample Affiliate Agreement at the end of this document.

The TeamCFA Affiliate School Agreement documents the affiliate relationship between TeamCFA and its network schools. TeamCFA does not charge a fee for its services and support--it is a philanthropic charter support organization; however, TeamCFA does expect a school to comply with certain non-negotiable components of an educational program that are consistent across the TeamCFA network of schools and are key to the successful operation of a public charter school. TeamCFA also expects that any affiliate school will meet certain academic, business, governance and educational technology objectives. These parameters are specifically set forth in the Affiliate

School Agreement. The Affiliate School Agreement may be terminated any time by either TeamCFA or the local school, provided that such termination be done in such a manner and at such a time that will have minimal to no impact on the students and their families. The school's governing board is responsible for the oversight and management of the school. TeamCFA will provide two representatives to participate and sit on the school's governing board. These two representatives will always sit in a minority voting position on the governing board. The local board will have full authority to monitor and evaluate the value of the school's affiliation with TeamCFA.

TeamCFA Foundation is not an Educational Management Organization.

The governing board of each charter school will be independent from TeamCFA, except that TeamCFA will appoint two directors to serve on the local school board. As previously addressed, the TeamCFA representatives will always sit in a minority voting position on the school's Board.

Since TeamCFA is not considered an EMO, there is no requirement for a service contract.





## AFFILIATE SCHOOL AGREEMENT

THIS AFFILIATE SCHOOL AGREEMENT is made and entered into as of the \_\_\_\_ day of \_\_\_\_\_ 20\_\_ by and between \_\_\_\_\_ (“NS”), whose address is \_\_\_\_\_ and TEAMCFA FOUNDATION, an Oregon nonprofit corporation (“TeamCFA”), whose address is 817 East Todd Drive, Tempe, Arizona 85283.

### RECITALS:

A. TeamCFA is a nonprofit organization that supports a growing national network of affiliated public charter schools dedicated to the mission of student achievement, academic excellence, measurable results and bringing school choice to more students and their families. TeamCFA employs proven academic, business and governance practices and leverages the free market to support the development and success of Challenge Foundation Academies (as defined below).

B. TeamCFA's stated mission is to: “support the development of academically rigorous, financially sustainable TeamCFA charter schools by employing proven academic, business and governance practices and leveraging the free market to support the broader school choice movement.” TeamCFA’s motto is “*Together Each Achieves More*,” a belief that the success of each student takes the active participation, communication and commitment of teachers, students and parents working in collaboration. TeamCFA further believes that by fostering a continuous partnership among all the stakeholders, the “TEAM” can build a strong culture of expectation, achievement and results.

C. The schools that affiliate with TeamCFA are called “Challenge Foundation Academies” or “CFAs.” CFAs offer structured and rigorous academic programs that include a committed partnership among students, teachers and parents. CFAs follow the Core Knowledge Foundation’s Core Knowledge Sequence designed to encourage steady academic progress as students build their knowledge and skills from one year to the next, developing students as capable and motivated learners.

D. NS operates one or more charter school(s) in the State (as defined below) pursuant to its Charter Contract (as defined below).

F. NS wishes to affiliate itself with the TeamCFA national network of CFAs and to accept certain support assistance that TeamCFA provides to CFAs and TeamCFA wishes to accept NS as an affiliate TeamCFA school and to provide the support assistance identified below to NS, pursuant to the terms and conditions of this Agreement.

NOW, THEREFORE, in consideration of the terms, conditions and premises contained herein, and other good and valuable consideration, the receipt and sufficiency of which is hereby acknowledged, the Parties agree as follows:

### AGREEMENTS:

#### 1. Definitions.

- 1.1. “AAA” means the American Arbitration Association.
- 1.2. “Agreement” means this Affiliate School Agreement by and between NS and TeamCFA.
- 1.3. “Annual Budget” means the annual charter school budget or budgets for each fiscal year.
- 1.4. “Authorizer” means the \_\_\_\_\_, which is the charter school authorizing authority for NS.

- 1.5. “Board” means the corporate Board of Directors of NS.
- 1.6. “CFAs” or “Challenge Foundation Academies” mean TeamCFA affiliated schools.
- 1.7. “Charter Contract” means, if NS has only one charter contract, the charter contract by and between NS and the Authorizer, or, if NS has more than one charter contract, now or in the future, collectively all of the charter contracts by and between NS and the Authorizer.
- 1.8. “Charter School Laws” means the State’s statutes, and the regulations, rules and policies established thereunder, that establish the State’s charter schools, and all other State laws, regulations, rules and policies that apply to charter schools in the State.
- 1.9. “Default” means the failure by a Party to observe, comply with or perform any of the terms, covenants or conditions applicable to such Party under this Agreement, where such Party fails to cure such Default within the applicable grace period specified in Section 14.
- 1.10. “Dispute” means any disagreement, claim, dispute, controversy or other matter in question between the Parties (including the question of what issues can be mediated or arbitrated and the validity of the dispute resolution provision in Section 13) arising out of, or relating to this Agreement, or any breach of this Agreement.
- 1.11. “Effective Date.” Whether such date is before or after the date the Parties sign this Agreement, the Parties agree that the Effective Date for this Agreement is \_\_\_\_\_, 20\_\_.
- 1.12. “NS” means New School.
- 1.13. “Party” means either NS or TeamCFA and “Parties” means, collectively, NS and TeamCFA.
- 1.14. “Revenue” means, to the extent permitted by applicable law, all revenues, rentals, fees, third-party payments, receipts or other income of NS, all as calculated in accordance with Generally Accepted Accounting Principles, including, without limitation, State per-pupil and other funding, federal funding, local funding, and operational and activities revenues, but expressly excluding any gifts, grants, bequests, donations or contributions.
- 1.15. “State” means the State of \_\_\_\_\_.
- 1.16. “Support Assistance” means the assistance provided to NS by TeamCFA in support of NS’ educational program, as set forth on Exhibit “A” attached to this Agreement and incorporated herein by this reference.
- 1.17. “TeamCFA’s Materials” means any curriculum, testing, analysis, reports, programs, policies, procedures, forms or other information or materials developed by or proprietary to TeamCFA and provided to NS.

## 2. Board Authority: Relationship.

- 2.1. Board Authority. Notwithstanding any provision contained herein, TeamCFA acknowledges and agrees that NS is and shall be governed by its Board, which is responsible for overseeing all NS’ operations, as well as this Agreement. TeamCFA shall provide Support Assistance to NS subject to the Board’s direction, oversight, policies, the requirements of this Agreement, Charter School Laws and other applicable law. Nothing in this Agreement shall be construed to interfere with the Board’s authority and duty to exercise its statutory, contractual and fiduciary responsibilities governing all NS’ operations. The Board has, and shall retain, the right to exercise its judgment in accepting or rejecting TeamCFA’s recommendations related to Support Assistance.
- 2.2. TeamCFA Representatives. Within 45 days after signing this Agreement, NS agrees to appoint or elect as voting directors on its Board, consistent with its Articles of Incorporation and Bylaws, two individuals designated by TeamCFA. NS further agrees that such TeamCFA-designated individuals, or their TeamCFA-designated successors,

shall remain as directors on the Board throughout the term of this Agreement and any extensions hereof. TeamCFA agrees that the individuals it designates will comply with all State and Authorizer requirements for board membership.

### 2.3. Relationship of the Parties.

2.3.1. Cooperation. The Parties agree that, subject to Charter School Laws and other applicable laws, regulations, duties and obligations of the Parties, NS and TeamCFA shall carry out their respective rights, duties and obligations under this Agreement in a cooperative manner to maximize the effectiveness of the educational process.

2.3.2. Charter Contract Changes. NS agrees to provide TeamCFA 10 days' prior written notice of any change or amendment to the Charter Contract.

2.3.3. Corporate Changes. NS agrees to provide TeamCFA with copies of NS' governance documents, including Articles of Incorporation and any amendments, Bylaws and amendments, and other policies and procedures used by the NS to the TeamCFA representatives on the Board of NS within 10 days of any request. NS further agrees to provide TeamCFA with 10 days' prior written notice of any change or amendment to NS' governance documents.

2.3.4. Relationship. The relationship between NS and TeamCFA is based solely upon the terms of this Agreement and any other written agreements between TeamCFA and NS. This Agreement shall create only an independent contract relationship and shall not be construed or interpreted to create an agency, employer-employee, partnership, joint venture or other legal relationship or entity. While performing under this Agreement, neither Party shall represent the other Party in any dealings or transactions except as expressly authorized herein and neither Party shall represent any relationship excepting the relationship specified herein. Neither Party may enter into, bind or attempt to bind the other Party to any contractual obligation or duty and each Party shall be solely responsible for its acts and omissions and for the acts and omissions of its directors, officers, employees, agents and contractors.

3. Affiliation. NS hereby affiliates with TeamCFA, for the term set forth herein, for the purposes of: (i) obtaining Support Assistance; (ii) working with TeamCFA to promote and grow the TeamCFA network of schools; and (iii) granting TeamCFA the right, power and authority to carry out TeamCFA's duties and obligations under this Agreement upon the terms and conditions set forth herein, to the extent permitted by the Charter School Laws and other applicable law. TeamCFA hereby affiliates with NS, for the term set forth herein, to: (a) work with NS to promote and grow the TeamCFA network of schools; and (b) assist NS for the purposes set forth herein with such authority as delegated to TeamCFA by this Agreement or by subsequent Board resolutions, subject to the terms and conditions of this Agreement, the Charter Contract, Charter School Laws and other applicable law.

3.1. CFA's Name. Consistent with such affiliation, NS agrees that, if its legal or trade name is not already in such form, it will, within 45 days of signing this Agreement, change its legal or trade name to the following form: "                                : *A Challenge Foundation Academy.*" Further, NS agrees to accept all of the rights and to perform all of the duties and obligations associated with such affiliation, as specified in this Agreement.

4. Term. Unless otherwise restricted by State law or earlier terminated as provided herein, the initial term of this Agreement shall commence on the Effective Date and continue until the earlier to occur of: (i) the termination of the Charter Contract; or (ii) the last day of NS' fiscal year during 202\_ and, in such event, the term shall automatically renew for an additional 10-year period (until the last day of NS' fiscal year during 203\_), unless either Party shall have provided the other Party with a minimum of 90 days prior written notice that such noticing Party does not wish to extend the term hereof. TeamCFA's Support Assistance shall cease upon the termination of this Agreement. As required by Subsection 15.6, time is of the essence with respect to this provision.

### 5. Responsibilities of NS and the Board.

5.1. Communication. The Board shall, in good faith, communicate and cooperate with TeamCFA with regard to NS' programs, operations and activities including, without limitation, policies, rules, regulations, procedures, curriculum and

budgets, subject to the constraints of the Charter School Laws, other applicable law and the requirements of the Charter Contract. Furthermore, the Board shall disclose to TeamCFA any and all information it receives from regulatory authorities regarding current practices, contracts, agreements, policies, procedures, business arrangements or performance shortcomings that could reasonably be construed as placing the charter contract in jeopardy of suspension or revocation. Nonetheless, the Board shall retain full discretion for all programs, operations and activities of NS and has discretion in affiliating with TeamCFA to provide Support Assistance. However, if NS consistently, repeatedly or in the whole (taking into consideration all of NS' programs, operations and activities) operates in a manner inconsistent with the mission, goals and principles of TeamCFA, in TeamCFA's sole discretion, then TeamCFA retains the right to terminate this Agreement as provided by Sections 12 and 14.

5.2. Facilities. Although, at NS' written request, TeamCFA may assist NS with facilities, NS is, and remains, responsible for the acquisition or lease, and continuing ownership or tenancy, of school facilities that provide an adequate learning environment for its students and comply with all of the requirements of the Charter Contract, Charter School Laws and other applicable law.

5.3. Cooperation. NS shall cooperate with TeamCFA in promptly furnishing all information and documents and submitting all forms and reports that may be necessary for either Party to properly perform its duties and obligations under this Agreement. Further, NS shall cooperate in scheduling and related matters, including providing timely written notice of all Board meetings.

5.4. Charter Contract and Compliance. NS and the Board agree to comply with the terms and provisions of the Charter Contract, Charter School Laws and other federal and state laws applicable to charter schools and agree not to act, or fail to act, in any manner that may cause NS to breach its Charter Contract

5.5. Evaluation. NS agrees to undergo an annual evaluation of its performance under this Agreement with the purpose of evaluating and improving NS' operations and the affiliate relationship. The annual evaluation of NS shall be conducted by TeamCFA, with the cooperation of NS, pursuant to evaluation criteria established by TeamCFA in its sole discretion.

5.6. Charter School Budget. NS is responsible for adopting the Annual Budget for each fiscal year in a timely manner and as required by State law, demonstrating that NS has adequate resources to fulfill its obligations under the Charter Contract and this Agreement, including, without limitation, the operations and activities of the charter school(s) operated by NS, payment of employee costs (if any), equipment, insurance, annual financial audits and other expenses. To that end, each fiscal year, the Board will take appropriate action under its Bylaws to adopt and approve an Annual Budget as and when required by State law. In addition, NS is responsible for approving revisions and amendments to such Annual Budget to reflect necessary deviations from the adopted Annual Budget.

5.7. Participation. NS agrees to actively participate in the continuing development of TeamCFA and to help promote TeamCFA's goals.

5.8. Specific Responsibilities. NS agrees to comply with the academic, business and governance requirements set forth on Exhibit "B" as may be modified from time to time by TeamCFA, in its sole discretion, attached hereto and incorporated herein by reference. Notwithstanding the prior written notice provisions set forth in Section 12.4, NS shall have 60 days following notice of modification of Exhibit "B" to consider the modifications and terminate this Agreement. If NS does not terminate this Agreement within 60 days following notice of the modifications, NS will be deemed to have acknowledged and agreed to the modified requirements.

## 6. Responsibilities of TeamCFA.

6.1. Support Assistance. TeamCFA shall, subject to the Board's authority, provide NS with Support Assistance as expressly delineated and defined on Exhibit A.

6.2. Communication. TeamCFA shall, in good faith, communicate and cooperate with NS with regard to TeamCFA's programs, operations and activities as are relevant to NS or NS' operations. Furthermore, TeamCFA shall disclose to the Board any and all information it receives from regulatory authorities and other TeamCFA affiliate

schools regarding current practices, contracts, agreements, policies, procedures, business arrangements or performance shortcomings that could reasonably be construed as placing the charter contract in jeopardy of suspension or revocation. In the event TeamCFA consistently, repeatedly or in the whole operates in a manner inconsistent with the mission and goals of NS, in NS' sole discretion, then NS, subject to Subsection 12.5, retains the right to terminate this Agreement as provided by Subsection 14.1.2.

6.3. Cooperation. TeamCFA shall cooperate with NS in promptly furnishing all information and documents and submitting all forms and reports that may be necessary for either Party to properly perform its duties and obligations under this Agreement. Further, TeamCFA shall cooperate in scheduling and related matters.

6.4. Charter Contract. TeamCFA agrees not to act, or fail to act, in any manner that may cause a breach of NS' Charter Contract.

6.5. Participation. TeamCFA agrees to actively participate in the continuing development of NS and to help promote NS' growth and improvement.

6.6. Compliance. TeamCFA acknowledges that this Agreement is subject to the terms of the Charter Contract, Charter School Laws and other federal and State laws applicable to charter schools. TeamCFA agrees to comply with the terms and provisions of the Charter Contract, Charter School Laws and other federal and state laws applicable to charter schools in performing its duties and obligations hereunder. If NS is, at any time, determined to be out of compliance because of any Support Assistance, TeamCFA shall cooperate to correct such deficiency and shall participate in any corrective action plan approved by the Authorizer to remedy such noncompliance.

6.7. Contracting. Except as expressly prohibited by the Charter Contract or Charter School Laws, TeamCFA may contract or subcontract all or any part of Support Assistance required by this Agreement, delegating the performance of, but not the responsibility for, any duties and obligations of TeamCFA hereunder to a qualified independent contractor, expert or professional advisor.

6.8. Acquisitions. In the event that TeamCFA assists with any acquisitions using NS' funds, all such purchased items or assets shall be owned by and remain the property of NS. TeamCFA shall not add any administrative charges or fees to the cost of such acquisitions. All property or assets acquired by TeamCFA with its own funds shall, at TeamCFA's option, be owned by and remain the property of TeamCFA or donated to NS by an express written letter of donation.

6.9. TeamCFA Offices. TeamCFA may or may not maintain offices within the State and TeamCFA may provide Support Assistance from any location at TeamCFA's discretion.

6.10. Other Support Assistance. Support Assistance to be provided by TeamCFA to NS under this Agreement comprise only those duties, responsibilities and obligations of TeamCFA expressly stated herein. TeamCFA shall not be obligated to provide any additional or other Support Assistance to NS except as may be mutually agreed in writing between TeamCFA and the Board in compliance with Subsection 15.15.

7. TeamCFA Loan. In furtherance of TeamCFA's mission, as amended from time to time, TeamCFA makes loans to CFAs in the amount of up to \$300,000, funding \$100,000 per year for a three-year period. The specific terms of the Loan will be memorialized in a promissory note between TeamCFA and NS. Notwithstanding such terms, TeamCFA will not release the first installment of the loan prior to NS' substantial compliance with this Agreement and the Academic, Business and Governance requirements set forth on Exhibit B. "Substantial compliance," as referred to in this Section 7, shall include only those requirements identified in writing by TeamCFA at the time this Agreement is signed by both parties.

## 8. Representations and Warranties.

8.1. NS' Representations and Warranties. NS hereby represents and warrants to TeamCFA that:

8.1.1. it is duly organized and existing as a State nonprofit corporation and an educational institution or organization established under Charter School Laws and is in good standing under the laws of the State; it will maintain, extend and renew its corporate existence under the laws of the State, and it will not do, suffer or

permit any act or thing to be done whereby its right to transact its functions might or could be terminated, its activities restricted or its nonprofit, 501(c)(3) status rescinded;

8.1.2. it has full authority and power to enter into this Agreement and it has been duly authorized to execute and perform this Agreement;

8.1.3. the execution, delivery, and performance of this Agreement will not conflict with or constitute a breach of or default by NS under any other instrument or agreement to which NS is a party or by which its property is bound and will not constitute a violation of any order, rule, or regulation of any court or governmental agency having jurisdiction over NS;

8.1.4. it is not in breach or default under any instrument or agreement, including, without limitation: (i) loans or other financial obligations; (ii) wage or salary obligations and related benefits and payroll taxes; and (iii) leases for real and personal property, where such breach or default may adversely affect NS' required performance under this Agreement;

8.1.5. there are no pending actions, claims, suits or proceedings filed or, to its knowledge, threatened or reasonably anticipated against or affecting it, which, if adversely determined, would have a material adverse effect on its ability to perform its obligations under this Agreement; and

8.1.6. prior to the Board's approval and NS' execution and delivery of this Agreement, each member of the Board and NS' legal counsel were given ample opportunity to review and discuss this Agreement.

8.2. TeamCFA's Representations and Warranties. TeamCFA hereby represents and warrants to NS that:

8.2.1. it is duly organized and existing as an Oregon nonprofit corporation and is in good standing under the laws of the State of Oregon; it will maintain, extend and renew its corporate existence under the laws of the State of Oregon, and it will not do, suffer or permit any act or thing to be done whereby its right to transact its functions might or could be terminated, its activities restricted or its nonprofit, 501(c)(3) status rescinded;

8.2.2. it has full authority and power to enter into this Agreement and it has been duly authorized to execute and perform this Agreement;

8.2.3. the execution, delivery, and performance of this Agreement will not conflict with or constitute a breach of or default by TeamCFA under any other instrument or agreement to which TeamCFA is a party or by which its property is bound and will not constitute a violation of any order, rule, or regulation of any court or governmental agency having jurisdiction over TeamCFA;

8.2.4. it is not in breach or default under any instrument or agreement, including, without limitation: (i) loans or other financial obligations; (ii) wage or salary obligations and related benefits and payroll taxes; and (iii) leases for real and personal property, where such breach or default may adversely affect TeamCFA's required performance under this Agreement;

8.2.5. there are no pending actions, claims, suits or proceedings filed or, to its knowledge, threatened or reasonably anticipated against or affecting it, which, if adversely determined, would have a material adverse effect on its ability to perform its obligations under this Agreement; and

8.2.6. prior to TeamCFA's execution and delivery of this Agreement, TeamCFA and its legal counsel were given ample opportunity to review and discuss this Agreement.

8.3. Disclaimer of Warranty. TeamCFA makes no expressed or implied warranties as to any matter whatsoever with regard to any equipment, materials or supplies purchased on behalf of or for use at NS, including without limitation the condition of any such item, its merchantability or fitness for any particular purpose. No defect or unfitness of any equipment, materials or supplies shall relieve NS of its obligations to pay for use of the item or of any other obligation

under this Agreement. Notwithstanding the foregoing, TeamCFA shall enforce any existing manufacturer warranties on all equipment, materials or supplies purchased on behalf of or for use at NS.

## 9. Insurance.

9.1. General Liability Insurance. Each Party shall, at its own expense, maintain general liability insurance, including, without limitation, bodily injury and property damage insuring itself with a minimum of \$1,000,000.00 per occurrence and \$2,000,000.00 aggregate limit of liability coverage. Each Party shall provide the other Party with a certificate evidencing such insurance and showing the other Party as an additional insured.

9.2. Workers' Compensation Insurance. Each Party shall, at its own expense, maintain workers' compensation insurance as required by law to cover their respective employees (if any) and shall provide the other Party with a certificate or certificates of such insurance.

9.3. Automobile Insurance. If a Party owns or operates any automobiles within the State, such Party shall, at its own expense, maintain comprehensive automobile insurance, insuring itself with a minimum of \$1,000,000.00 combined single limit. Each such Party shall provide the other Party with a certificate evidencing such insurance and showing the other Party as an additional insured.

9.4. Cancellation; Subrogation. Each insurance policy required herein shall provide for not less than 10 days written notice to the other Party in the event of cancellation or material change of coverage. To the maximum extent permitted by its insurance policies, each Party, for the benefit of the other Party, waives any and all rights of subrogation which might otherwise exist (and the certificate required herein shall indicate such waiver of subrogation).

10. Indemnification. NS agrees to indemnify, defend, save and hold TeamCFA, and its directors, officers, employees, agents and other representatives harmless from and against any and all manner of loss, cost, expense (including attorneys' fees and other costs and expenses of litigation, defense and appeal), damage, injury, liability, claims, actions and causes of action whatsoever arising from or in any way related to NS': (i) own negligent or willful acts or omissions; (ii) breach of this Agreement; or (iii) operation of its own business.

## 11. Intellectual Property Rights.

11.1. In connection with its Support Assistance, TeamCFA may furnish NS with TeamCFA's Materials. The Parties agree that all TeamCFA's Materials have been authored, originated, discovered and invented by TeamCFA and that TeamCFA shall be deemed to be the author and originator of all TeamCFA's Materials. TeamCFA shall have and retain all right, title and interest in and to TeamCFA's Materials, all rights to sell, assign or otherwise transfer any right, title or interest in TeamCFA's Materials and all rights to apply for, register, obtain and own any and all copyrights, trademarks, service marks, trade names, patents and/or other exclusive or proprietary registrations or forms of ownership. During the term of this Agreement, TeamCFA hereby grants NS a revocable license to use TeamCFA's Materials; provided, however, that NS shall have no right to sell or otherwise transfer any of TeamCFA's Materials. In the event NS is held, for any reason, to have any right, title or interest to any of TeamCFA's Materials, regardless of the media and whether or not copyrighted or copyrightable, trademarked or registerable, patented or patentable, NS hereby unconditionally and irrevocably transfers and assigns such right, title and interest to TeamCFA as an essential part of the consideration for this Agreement. NS further agrees that it shall, within five days after receipt of a written request from TeamCFA, execute a written instrument for the purpose of waiving its rights, if any, to attribution for any of TeamCFA's Materials under Section 106A(a) of The Copyright Act of 1976 (17 U.S.C. Sec. 101, 1976) or any succeeding law.

## 12. Termination.

12.1. Without further notice and without further liability to either Party, this Agreement shall terminate if:

12.1.1. the State legislature or any other source of public funding fails to appropriate funds for the operation of charter schools in the State. In such an event, this Agreement shall terminate on the last date that funds are appropriated for the operation of charter schools; or

12.1.2. NS' Charter Contract is revoked or not renewed by the State. In such an event, this Agreement shall terminate on the date the Charter Contract expires or on the date of revocation, as applicable;

12.2. In the event NS Defaults, as specified in Section 14, TeamCFA shall have the right to terminate this Agreement upon providing NS proper written notice as required by Section 14.

12.3. In the event TeamCFA Defaults, as specified in Section 14, NS shall have the right to terminate this Agreement upon providing TeamCFA proper written notice as required by Section 14.

12.4. In addition to NS' right to terminate this Agreement upon a Default, subject to Section 12.5, NS shall have the right to terminate this Agreement, with or without cause, on the last day of each of NS' fiscal years during the term of this Agreement, but only if NS has provided TeamCFA a minimum of 90 days prior written notice of such termination. In the event NS fails to provide such prior written notice in a timely manner, NS irrevocably waives the right to terminate for such fiscal year and must wait until the last day of the next fiscal year if it wishes to terminate. As required by Subsection 15.6, time is of the essence with respect to this provision.

12.5. Upon termination of this Agreement, whether due to expiration of the term or earlier termination as provided herein, TeamCFA shall have the right to discontinue all Support Assistance immediately and without further notice. In such event and without further notice, TeamCFA will cancel, terminate, disconnect and discontinue all: (i) marketing programs; (ii) professional training programs and events; (iii) right to collaborate with the TeamCFA network; (iv) board training or recruiting programs and events; (v) board/staff gatherings, programs and events; (vi) access to or renewal of any national or regional contracts or programs to which NS has access or is a party by reason of this Agreement; (vii) other assistance; and (viii) revoke the right to use the "Challenge Foundation Academy" name in conjunction with NS' name. Moreover, TeamCFA and TeamCFA shall cause all Loan funding to cease as of the date of termination. Further, upon termination, NS shall, within 60 days, discontinue using the "Challenge Foundation Academy" name in conjunction with NS' name and discontinue the use of the immediately surrender all TeamCFA Materials, including all copies of TeamCFA Materials, in whatever form, to TeamCFA.

13. Dispute Resolution. In the event of any Dispute between the Parties, the Parties agree to submit the Dispute first to non-binding mediation and then to binding arbitration.

13.1. Mediation. Any Dispute shall be subject to mediation as a condition precedent to binding arbitration. Unless the Parties mutually agree otherwise, such mediation shall be in accordance with the mediation rules of the AAA currently in effect. Request for mediation shall be filed in writing with the other Party and with a mutually-acceptable private mediator or mediation service. The request may be made concurrently with the filing of a demand for arbitration but, in such event, mediation shall proceed in advance of arbitration, which shall be stayed pending mediation for a period of 30 days from the date of filing, unless stayed for a longer period by agreement of the Parties. The Parties shall share the mediator's fee and any filing fee equally. The mediation shall be held in the State, within 25 miles of NS' primary location, unless such location is impracticable for both Parties, in which event the Parties shall mutually agree upon an alternate location. Agreements reached in mediation shall be enforceable as settlement agreements in any court having jurisdiction thereof.

13.2. Arbitration. In the event such Dispute is not resolved through mediation, the Parties agree to submit the Dispute to binding arbitration. The foregoing agreement to arbitrate shall be specifically enforceable under prevailing arbitration law.

13.2.1. Rules; Confidentiality. The Dispute shall be arbitrated in accordance with the Commercial Arbitration Rules of the AAA as then existing, to the extent such rules are not inconsistent with the provisions of this Section 13, but shall not be arbitrated by an AAA tribunal, or administered by the AAA, unless specifically agreed to, in writing, by the Parties. Each of the Parties shall keep all Disputes and arbitration proceedings strictly confidential, except for disclosures of information required by applicable law or regulation.

13.2.2. Procedure. Notice of the demand for arbitration shall be given in writing to the other Party in the manner provided for notice by Subsection 15.8. The demand for arbitration shall be made within a reasonable time after the Dispute has arisen, and in no event shall it be made after the date when institution of legal or equitable proceedings based on such Dispute would be barred by the applicable statute of limitations. Unless



otherwise agreed in writing by the Parties, either the Parties or their legal counsel shall, within 30 days following notification of the arbitration, mutually agree upon, qualify and select an arbiter. In the event the Parties cannot mutually agree on one arbiter, an arbitration panel, composed of three arbiters, shall be selected in the following manner: each of the Parties, or their respective legal counsel, as the case may be, shall, within 40 days after one Party notifies the other of his, her or its intent to arbitrate a Dispute, each select an arbiter and the two arbiters shall, within 15 days following notification of their selection, select a third arbiter. In the event either Party fails to timely select an arbiter, the arbiter selected by the other Party shall be the sole arbiter and shall hear the Dispute. In the event each Party selects an arbiter, and the selected arbiters cannot decide upon a third arbiter for the panel, the third arbiter shall be qualified and selected by the then presiding judge of the State court system from a list of five arbiters provided by the AAA. To qualify to arbitrate any Dispute under this Section 13, the arbiter must be a licensed attorney in the State, must have practiced law in such jurisdiction for a minimum of 10 years and must have a minimum of five years' experience in the area of the law primarily implicated by the Dispute. If the Parties cannot agree on the "primary" area of law implicated, they shall select arbiters with a minimum of five years' experience in business and contract law. Once qualified and notified of his or her selection, the arbiter (or arbitration panel, as applicable) shall hear the Dispute within 60 days and render a written legal opinion and decision, specifying the factual and legal basis for the decision, within 20 days thereafter (or as soon thereafter as is practicable and justified under the circumstances). In the case of an arbitration panel, the opinion of the majority of the arbiters shall be adopted as the panel's opinion.

13.2.3. Discovery; Decision; Award. Discovery may be conducted either upon mutual consent of the Parties, or by order of the arbiter upon good cause being shown. In ruling on motions pertaining to discovery, the arbiter shall consider that the purpose of arbitration is to provide for the efficient and inexpensive resolution of Disputes, and the arbiter shall limit, expedite or order discovery whenever appropriate to insure that this purpose is preserved. The decision and award rendered by the arbiter shall be based upon applicable law and judicial precedent and shall be final, conclusive and binding upon each of the Parties. Judgment may be entered upon the arbiter's decision in accordance with applicable law in a court having jurisdiction thereof. Any such award by the arbiter shall include recovery by the prevailing Party of the costs and expenses of the proceeding, including reasonable attorneys' fees; provided that, if neither Party prevails, the expenses of arbitration (other than attorneys' fees) shall be borne equally between the Parties. Any such award by the arbiter shall not include the award of punitive damages in excess of an amount equal to the compensatory damages awarded in the proceeding.

#### 14. Default; Remedies.

14.1. Default. A Default shall entitle the non-defaulting Party to pursue the remedies set forth in Subsection 14.2. Specific Defaults and cure periods are set forth below:

14.1.1. The failure by either Party to observe, comply with or perform any obligation under this Agreement (expressly including, without limitation, either Party's failure to operate in a manner consistent with the mission, goals or principles of the other Party as required by Subsection 5.1 and 6.2, as applicable) where such Default continues for a period of 60 days after written notice thereof by or on behalf of the non-defaulting Party to the defaulting Party; provided, however, that if the nature of the Default is such that more than 60 days are reasonably required for its cure, then it shall not be deemed to be a Default if the defaulting Party commences such cure within said 60-day period and thereafter diligently prosecutes such cure to completion;

14.1.2. The occurrence of any of the following events: (i) the making by a Party of any general arrangement or assignment for the benefit of creditors; (ii) a Party becomes a "debtor" as defined in 11 U.S. Code Section 101 or any successor statute thereto (unless, in the case of a petition filed against such Party, the same is dismissed within 90 days); (iii) the appointment of a trustee or the judicial appointment of a receiver to take possession of substantially all of a Party's assets, where possession is not restored to such Party within 90 days; or (iv) the attachment, execution or other judicial seizure of substantially all of a Party's assets, where such seizure is not discharged within 90 days; or

14.1.3. The failure by NS to comply with the requirements set forth on Exhibit B of this Agreement.

## 15. General Provisions.

15.1. Incorporation of Recitals. Recitals “A” through “F” above are acknowledged by the Parties to be true and correct and are incorporated herein as a material part of this Agreement.

15.2. No Delegation of Authority. Nothing in this Agreement shall be construed as: (i) delegating to TeamCFA any of the powers or authority of the Board which are not subject to delegation by the Board under Charter School Laws or other applicable law; or (ii) interfering with the Board’s duty to exercise its statutory, contractual and fiduciary responsibilities governing the operation of NS. Furthermore, notwithstanding any contrary provision contained herein, no provision of this Agreement shall be construed to prohibit the Board from acting as an independent, corporate governing body.

15.3. Statutory Requirements.

15.3.1. TeamCFA acknowledges that NS must comply with all the financial requirements for its charter schools under applicable State law. TeamCFA agrees to provide such details and documentation as are reasonably necessary for NS to meet its accounting and reporting obligations. Upon reasonable, written notice, NS and its designees shall have the right to review and audit TeamCFA’s books and records as they relate to this Agreement, including the right to make copies.

15.3.2. Pursuant to applicable state laws, no indebtedness of any kind incurred or created by NS shall constitute any indebtedness of the state or its political subdivisions, and no indebtedness of NS shall involve or be secured by the faith, credit or taxing power of the state or its political subdivision.

15.4. Force Majeure. If performance by TeamCFA or NS of any of their respective obligations under the terms of this Agreement is interrupted or delayed by an act of God, by acts of war, riot, terrorism or civil commotion, by an act of the State, by fire or flood, or by the occurrence of any other event beyond the reasonable control of the Parties, then Parties shall be excused from such performance for the same amount of time as such occurrence lasts or such period of time as is reasonably necessary after such occurrence abates for the effect of the occurrence to have dissipated. The Parties agree to act diligently to remedy the cause of any delay subject to this Subsection 15.4. Each Party shall notify the other Party promptly after any occurrence subject to this Subsection 15.4 that may affect the Party’s performance of its obligations under this Agreement.

15.5. Assignment. Neither Party may assign any of its rights, duties or obligations under this Agreement without the other Party’s prior written consent.

15.6. Time of Essence: Time Periods. Time is of the essence of this Agreement and each and every provision of this Agreement. Any extension of time granted for the performance of any duty under this Agreement shall not be considered an extension of time for the performance of any other duty under this Agreement. Unless expressly stated otherwise, any computation of time periods permitted or required herein stated in “days” shall mean calendar days. “Business day,” when so identified, shall mean normal working days, excluding Saturdays, Sundays and federal or State legal holidays. If the time for performance of any obligation due hereunder or the making of any election permitted hereunder is stated in “days” and expires on a Saturday, Sunday or federal or State legal holiday, then the time for performance of such obligation or for the making of any such election shall be extended to the next day which is not a Saturday, Sunday or legal holiday.

15.7. Successors In Interest. This Agreement shall be binding upon, inure to the benefit of, and be enforceable by and against the respective successors and assigns of the Parties.

15.8. Notices. All notices required or permitted under this Agreement shall be in writing and shall be deemed received upon personal delivery (by hand delivery or courier), three days after being sent by registered or certified United States mail, return receipt requested, properly addressed with postage fully prepaid, or one day after being sent by a reputable, overnight express-mail service, addressed to the respective Party at its address as set forth above, or to such other address as each Party shall, from time to time, specify in the manner provided herein.

15.9. Severability. To the full extent possible each provision of this Agreement shall be interpreted in such fashion as to be effective and valid under applicable law. If any provision of this Agreement is declared void or unenforceable with respect to particular circumstances, such provision shall remain in full force and effect in all other circumstances. If any provision of this Agreement is declared entirely void or unenforceable, such provision shall be deemed severed from this Agreement and this Agreement shall otherwise remain in full force and effect.

15.10. Governing Law. This Agreement shall be deemed to be made under, shall be construed in accordance with, and shall be governed by, the internal, substantive laws of the State, without reference to any choice-of-law principles or provisions.

15.11. Indemnities; Survival. Each and every indemnity given herein, and the provisions of Subsection 15.16, Attorneys' Fees, shall survive the expiration or termination of this Agreement.

15.12. Consents and Approvals. Except as otherwise expressly provided herein, wherever in this Agreement the consent or approval of a Party is required to an act by or for the other Party, such consent or approval shall not be unreasonably withheld or delayed.

15.13. Waivers. No waiver of any term covenant or condition hereof shall be deemed a waiver of any other term, covenant or condition hereof, or of any subsequent violation of the same or any other term, covenant or condition hereof. A Party's consent to or approval of, any act of the other Party shall not be deemed to render unnecessary the obtaining of the applicable Party's consent to, or approval of, any subsequent or similar act by the other Party, or be construed as the basis of an estoppel to enforce the provision or provisions of this Agreement requiring such consent.

15.15. Amendments. This Agreement may be amended or modified only in writing, signed by the Parties in interest at the time of the modification.

15.17. Counterparts. This Agreement may be executed in any number of counterparts, all such counterparts shall be deemed to constitute one and the same instrument, and each of the executed counterparts shall be deemed an original of this Agreement; provided, however, that this Agreement shall not be effective or enforceable unless and until it is executed by each Party.

15.18. No Third Party Rights. No person or entity who is not a party to this Agreement shall have any right to performance under this Agreement nor shall any person or entity who is not a party to this Agreement have any right to enforce this Agreement.

5.19. Captions; References; Interpretation. Captions and headings are for convenience only and shall not alter the interpretation of any provision or be used in construing this Agreement. Reference to any "section" or "subsection" contained herein is a reference to such section or subsection of this Agreement, unless the reference expressly identifies a section or subsection of another document. If the context requires, the use of the singular or plural (including the use of defined terms) shall also refer to the other. The word "including" is not exclusive; if exclusion is intended, the word "comprising" is used instead. The word "or" shall be construed to mean "and/or" unless the context clearly prohibits that construction. The language in all parts of this Agreement shall in all cases be construed as a whole according to its fair meaning and not strictly for or against any Party. Each Party warrants and represents that they have read this Agreement in its entirety, that they understand each and every term and condition hereof, and that they have had ample time to seek the advice of their own legal counsel and other professional advisors before signing this Agreement. Accordingly, any rule of construction to the effect that ambiguities are to be construed against the drafting Party shall not apply to the interpretation of this Agreement or any amendment or exhibit hereof.

15.20. Representative Signatures. The Parties each represent and warrant that any individual signing in a representative capacity for such Party has been duly authorized to execute and deliver this Agreement and has full authority and power to bind his or her principal to this Agreement. Each Party shall, upon the execution of this Agreement, deliver to the other Party documents evidencing such authority.

15.21. No Disparagement. During the term of this Agreement and for a period of two years thereafter, TeamCFA agrees that neither it, nor its directors, officers, employees or agents, will defame or disparage NS, nor any of NS' directors, officers, employees, or agents. During the term of this Agreement and for a period of two years thereafter, NS, on behalf of itself and any of its affiliated entities, agrees that neither it, nor its directors, officers, employees or agents, will defame or disparage TeamCFA, or TeamCFA's directors, officers, employees, agents or affiliates, including any TeamCFA-affiliated school.

15.22. Entire Agreement. This Agreement, including any exhibits or schedules referenced herein, contains the entire agreement and understanding of the Parties with respect to the subject matter of this Agreement and all agreements and understandings entered into prior to this Agreement, with respect to the subject matter hereof, are revoked and superseded by this Agreement.

IN WITNESS WHEREOF, the undersigned have executed this Agreement as of the date and year first written above.

\_\_\_\_\_, a \_\_\_\_\_ nonprofit corporation

By: \_\_\_\_\_

Printed Name: \_\_\_\_\_

Title: \_\_\_\_\_

TEAMCFA FOUNDATION, an Oregon nonprofit corporation

By: \_\_\_\_\_

Printed Name: \_\_\_\_\_

Title: \_\_\_\_\_

ACKNOWLEDGMENT OF RECEIPT OF A COPY OF THE AFFILIATION AGREEMENT:

\_\_\_\_\_  
Board President/Chair

\_\_\_\_\_  
Board Vice President/Vice Chair

\_\_\_\_\_  
Board Secretary

\_\_\_\_\_  
Board Treasurer

\_\_\_\_\_  
Board Member

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Board Member

EXHIBIT A  
SUPPORT ASSISTANCE

Pursuant to Section 6.1 of the Affiliate School Agreement (the "Agreement"), dated \_\_\_\_\_ between \_\_\_\_\_ ("NS") and TeamCFA Foundation ("TeamCFA"), TeamCFA agrees to provide support assistance to NS substantially in the following manner:

1. Marketing. This program includes custom school-specific TeamCFA supported website including individual teacher pages, marketing toolkit and promotional materials, the ConnectCFA magazine, logo development, assistance with setting up school e-mails and a print portal to order printed materials.
2. Core Knowledge Foundation Training and Materials. For so long as the Core Knowledge Foundation permits TeamCFA and CFAs such discounts, regular Core Knowledge training at a 10 percent discount and a 15 percent discount on Core Knowledge materials.
3. Loan. Unless this Agreement is terminated before the end of three years from the Effective Date and provided that NS complies with the terms of the Loan set forth in a separate Loan Agreement and/or Promissory Note, TeamCFA will provide a loan to NS in the amount of \$100,000.00 per year for the first three years of the term of this Agreement.
4. National Collaboration. As an integral part of affiliating with TeamCFA, NS will have the right to collaborate with the entire national network of CFAs.
5. Board Training and Recruitment. NS will receive assistance with ongoing board training and board member recruitment as well as the appointment of two TeamCFA representatives to sit on NS' governing board and serve as liaisons between NS and TeamCFA.
6. Board/Staff Gatherings. Periodic sponsored Board Dinners and Staff-Board luncheons for the purpose of furthering the "community" culture of the TeamCFA network.
7. National Conference. Subject to TeamCFA policies and restrictions, NS will receive grant support to attend the TeamCFA National Conference. Subject to State laws and regulations, attendance at the TeamCFA Conference may, but is not guaranteed to, provide Continuing Education Credit.
8. Educational Technology Support. Educational Technology support offers advice, recommendations and help with all aspects of technology such as infrastructure, help with school technology plans, recommendations on hardware and software, integrating technology with Core Knowledge, and Professional Development.
9. Public Relations Support. The public relations program includes assistance in identifying local media markets, press release and announcement support, promotion as a member of the TeamCFA network, both internally and externally, through traditional media outlets as well as social media. Training is provided, upon request, in all aspects of effective public relations.

## EXHIBIT B

### TeamCFA ACADEMIC, BUSINESS AND GOVERNANCE REQUIREMENTS

Pursuant to Section 5.8 of the Affiliate School Agreement (the "Agreement"), dated \_\_\_\_\_ between \_\_\_\_\_ ("NS") and TeamCFA Foundation ("TeamCFA"), NS agrees to perform the following Academic, Business and Governance Requirements.

1. Pursuant to NS' Bylaws or organizational procedures, elect or accept two representatives designated by TeamCFA in TeamCFA's sole discretion, to NS' Board of Directors or Governing Board of the Charter School and, if required, make amendments to NS' Articles of Incorporation or Bylaws to permit such appointment or election;
2. Implement the Core Knowledge Sequence for grades kindergarten through eight and adopt and implement any phonics-based reading instruction for grades kindergarten through two and permit site visitations or other evaluations by the Core Knowledge Foundation or TeamCFA staff to evaluate NS' fidelity to the Core Knowledge Sequence, at a frequency determine by TeamCFA;
3. Change and maintain its name or trade name in accordance with Section 3.1 of the Agreement;
4. Actively maintain and update NS' website in a format prescribed by TeamCFA, in TeamCFA's sole discretion;
5. Adopt a dress code policy which, at a minimum, provides for required student uniforms that include NS's logo;
6. Implement nationally-normed assessments as determined by TeamCFA (at present, the Northwest Evaluation Association's Measures of Academic Progress test in grades kindergarten through eight) at a minimum, during the fall and spring testing periods and provide the test results to TeamCFA upon request;
7. Develop, implement and measure a school-wide model of technology integration that complements the NS' mission and purpose;
8. Implement a coherent, individualized, software-based learning platform for teachers and student to provide customized student instruction and remediation both inside and outside the school that supports NS' academic goals and the Core Knowledge Sequence as determined by TeamCFA (currently CompassLearning Odyssey);
9. Develop a written professional growth program emphasizing implementation of the Core Knowledge Sequence and provide a copy of the plan to TeamCFA;
10. Demonstrate fiscal responsibility by utilizing a recognized, regularly audited accounting system and monitoring all financial transactions;
11. Maintain insurance that adequately covers school and directors;
12. Demonstrate a plan to annually reduce per-student operating costs;
13. Prepare and review financial reports as recommended by TeamCFA, whose current recommendation includes, at a minimum: monthly board review of current and year to date budget to actual reports, monthly finance committee or board review of cash position and voucher/expense reports, quarterly board review of balance sheet, annual board review of statement of cash flows, financial audit and 990;
14. Obtain an annual independent audit and provide a copy of the auditor's report and Form 990 Tax Return to TeamCFA within 30 days of the completion of the report or return;
15. At all times during the term of this Agreement and any extension thereof, maintain a board of directors that has at least three directors (not including the two representatives appointed by TeamCFA), of which a majority of the board of directors are not related parties by family or business relationships;
16. Maintain an exclusive affiliation with TeamCFA unless TeamCFA and NS otherwise agree in writing;
17. Demonstrate professionalism, collaboration and idea-sharing with TeamCFA and the TeamCFA network of affiliated schools by, at a minimum, providing academic data and test results to TeamCFA upon request; provide usage and progress access to software learning programs on a regular basis (weekly); providing financial data and audit reports to TeamCFA upon request; engage in the annual evaluation required pursuant to Section 5.5 of the Agreement; participate in good faith in TeamCFA events, including the annual conference, board dinners, staff luncheons and community development luncheons, as appropriate; provide ideas and accomplishments to TeamCFA and to other TeamCFA Network Schools on a regular basis; and provide NS' teachers the opportunity to share and collaborate on the TeamCFA website.



## **TeamCFA Strategic Plan**

- I. **TeamCFA Mission: To support the development of academically rigorous, financially sustainable charter schools by employing proven academic, business and governance practices and leveraging the free market to support the broader school choice movement.**
  
- II. **Vision: To graduate thoughtful, articulate youth who are prepared to become productive, accountable, engaged citizens.**
  
- III. **Team CFA Core capabilities:**
  - John Bryan vision
  - Bryan family resources
  - Core Knowledge curricula
  - School management; continuous improvement
  - Teacher excellence; continuous improvement
  - Successful school models
  - Technology
  - Cost effective and high quality buildings
  - State policy analysis capabilities
  - Key stakeholder relationships in target states
  - Annual conference
  - Committed leadership and staff
  
- IV. **Team CFA capability gaps (opportunities/improvement areas)**
  - School improvement capability
  - School and student performance evaluation tools
  - Fundraising capability
  - Leadership identifier and development capability
  - Effective governance model

## V. TeamCFA Strategic Goals

### 1) **Strategic Goal 1: Reach financial stability that protects and promotes Challenge Foundation donor intent but also raises additional resources to help sustain and grow the network for decades into the future.**

- a) Objective: review, revise and adjust current programs and activities to ensure optimal use of resources towards advancing TeamCFA mission.
  - i) Strategy:
    - (1) The TeamCFA Board will hold an annual March budget planning meeting, using a zero based budget template to ensure that each dollar is being allocated to the highest areas of need in our network, consistent with the four strategic goals, designed by our Chief Operating Officer. These goals were constructed after extensive interviews with our network school leadership and the TCFA staff, and review of Mr. Bryan's five year budget goals.
    - (2) As each budget is constructed from 2016/17 through 2020/21, we request the following budget contribution commitment from the Challenge Foundation:
      - (a) Year 1 - 100% (not to exceed \$7 million)
      - (b) Year 2 - 90%
      - (c) Year 3 - 75%
      - (d) Year 4 - 60%
      - (e) Year 5 - 50%

### 2) **Strategic Goal 2: The overall academic performance of each affiliated school demonstrates improvement over prior year or rates among the highest in the state.**

- a) Objective 1: Each affiliate school demonstrates curricula aligned with its State standards with Core Knowledge as the centerpiece, adding pieces to satisfy state requirements.
  - i) Strategy:
    - (1) Train and support school leaders and staff in the implementation of Core Knowledge, all curricula and effective practices.
      - (a) January 2016 - August 2017
        - (i) Create a menu of professional development workshops based on observed school needs. Develop detailed task analyses of State Standards.
        - (ii) Provide individual support for school leaders.
        - (iii) Presentation and monitoring of effective instructional practices focusing on Core Knowledge and including curriculum implementation. (Domain map, CKLA with listen and learn and read alouds, Singapore math).
        - (iv) Evaluate the implementation of Core Knowledge content in affiliated schools.
      - (b) June 2016 through August 2021



- (i) Yearly update detailed task analyses of State standards.
- (ii) Develop and implement effective Core Knowledge curriculum maps.
- (c) Measurement: State Directors will give yearly reports on each school in their region as to the standing of each school and progression of CK as based on CK evaluations.

b) Objective 2: Each affiliate school effectively assesses academic performance over time.

i) Strategy:

(1) Support schools in acquiring necessary tools to perform desired assessments.

(a) January 2016 - August 2017

(i) Support schools in the development of unit and domain assessments aligned to state standards.

(ii) Support schools in implementing a technology based assessment system.

(b) June 2016 - August 2021

(i) Continue to support implementation and refinement of assessment programs.

(ii) Support schools in implementing a technology based assessment system.

(c) Measurement: Technology Division will give yearly report on level of implementation of technology per school as well as use of tech to support academics concentrating on Core Knowledge.

(2) Review and evaluate assessment data

(a) January 2016 - August 2017

(i) Train all schools, but focus on new and struggling schools in effective evaluation of NWEAMAP data.

(b) Measurement: After each assessment, person(s) responsible for NWEA MAP data will report to each school board.

(3) Train and support Board Reps and board members to understand and make effective decisions based on all relevant data.

(a) January 2016 - August 2017

(i) Train board members to understand MAP data.

(ii) Introduce board members to other relevant data collected by schools.

(b) June 2016 - August 2021

(i) Yearly training for full board by MAP Data team member.

(ii) Yearly training for full board by Data team member.

**3) Strategic Goal 3: The overall financial performance of each affiliated school demonstrates a viable organization with strong fiscal management practices.**

a) Objective (2a): Each affiliate school functions within its operating budget and works to build a minimum of three month's cash in reserve over the first five years of operation.

i) Strategy:

- (1) Train and support school leaders to maximize available resources to enhance school performance.
  - (a) January 2016 - August 2017
    - (i) Train new and struggling school leaders in funding sources and use of funds
  - (b) June 2016 - August 2021
    - (i) School Support team will continue to train and support school leader.
  - (c) Measurement: SST Leaders will give quarterly reports to COO on individual leader's progress.
  - (d) January 2016 - August 2017
    - (i) Train new leaders in budget development
  - (e) June 2016 - August 2021
    - (i) TeamCFA will contract with local financial providers to perform intensive trainings for all new and developing school directors.
- (2) Train and support board reps and school board members in the complexities of school finance.
  - (a) January 2016 - August 2017
    - (i) Introduce board members to state funds, major federal grants/title funds and school budgets
- (3) Train and support board reps and board members in reviewing expenditures.
  - (a) January 2016 - August 2017
    - (i) Train and support board members to evaluate monthly budgets and projections.
  - (b) June 2016 - August 2021
    - (i) TeamCFA will contract with local financial providers to preform once yearly budget training for full boards.
- (4) Train and Support board reps in TeamCFA financial targets
- (5) Review and evaluate monthly board reports
  - (a) January 2016 - August 2017
    - (i) Review and evaluate information collected in board reports.
  - (b) Measurements: State Directors will give quarterly reports to the COO on individual school board reports.

b) Objective (2b): All startup schools are provided appropriate financial support.

i) Strategy:

- (1) Leverage significant purchasing power and the funds to support the concept of providing goods and services to each CFA at lower costs than available separately.
  - (a) January 2016 - June 2017
    - (i) Explore other purchasing opportunities.
- (2) Identify and provide resources for the implementation of curriculum, professional development and assessments.
  - (a) January 2016 - June 2017

- (i) Further develop resources such as webpage, Core Knowledge materials, marketing materials, Compass Learning, etc.
- (3) Identify and provide resources for facility acquisition and development.
  - (a) January 2016 - June 2017
    - (i) Further develop and explore the availability of resources such as those provided by CFP.

**4) Strategic Goal 4: The overall governance performance of each affiliated school demonstrates a viable organization with strong oversight practices.**

- a) Objective: Each affiliate school demonstrates sound operations.
  - i) Strategy:
    - (1) Train and support board reps in the applicable laws and obligations of the charter contract.
      - (a) January 2016 - June 2017
        - (i) Once yearly board training, conducted by TeamCFA contractors
      - (b) June 2016 – August 2021
        - (i) Ongoing
      - (c) Measurement: Yearly, the State Director will review training with TeamCFA board reps in their State. State Directors will appoint Board Reps in their state.
    - (2) Reviews and evaluate monthly board reports for implementation of good governance practices.
      - (a) January 2016 - June 2017
        - (i) State Directors will review and rework the TeamCFA Board Representative Report.
      - (b) June 2017 - August 2021
        - (i) Ongoing
      - (c) Measurement: State Directors will evaluate the monthly reports from all the TeamCFA Board Representatives of their giving quarterly reports to the COO.

**5) Strategic Goal 5: TeamCFA will continue to grow the network**

- a) Objective (4a): expand the network within existing states (North Carolina, Arizona, Indiana)
  - i) Strategy:
    - (1) State Directors will lead the development and submission of new charter applications within the states TeamCFA currently operates.
      - (a) January 2016 - August 2017
        - (i) Work through existing application submissions. (Indiana X2) Fall 2017
      - (b) Measurement: Quarterly, State Directors will give written reports on plans for new applications or potential target areas for new applications.

- (2) State Directors will identify and vet approved charter school applicants in the state TeamCFA currently operates that have not yet opened for addition to the network.
  - (a) January 2016 - August 2017
    - (i) Explore the mission and academic programs of recently approved applicants and determine whether it would be mutually beneficial to invite the school in to the network.
  - (b) June 2016 - August 2021
    - (i) Identify Core Knowledge schools with potential growth, with internal capacity to improve, and with committed board members.
  - (c) Measurement: Annually, State Directors will give written reports on contacts/exploration of potential existing non-profits that have secured new charters that have yet to open. Reports will be due 30 days after the approval date(s) for the state. If a state has more than one approval date, a report will be required for each approval date.
- (3) State Directors will identify existing charter schools for inclusion in the network.
  - (a) January 2016 - August 2021
    - (i) Explore the mission and academic programs of operating schools and determine whether it would be mutually beneficial to invite the school into the network
  - (b) Measurement: Quarterly, State Director's will give written reports on contact/exploration of existing charter schools with potential to add to the network.

b) Objective (4b): expand the network in additional states

i) Strategy:

- (1) TeamCFA will explore the expansion of network schools in states where it is most strategically advantageous (based on a decision making framework).
  - (a) January 2016 – August 2017
    - (i) Develop a decision making framework based on key factors such as location, proximity to existing network, state policy environment, key stake holders, other potential donor partners, etc.
    - (ii) Apply the decision making tool to explore expansion opportunities in states additional states such as but not limited to OK, AR, OH, SC, TN, GA, NM, NV, CO, KY, and others.
    - (iii) Develop POVs on selected target states and map out expansion plan, identify a state director and assist them in executing strategy
  - (b) June 2017 - August 2021
    - (i) Board to consider recommended schools for TeamCFA growth consideration.
  - (c) Measurements; the Director of Advancement will give an Annual report to potential schools in stats that do not have current TeamCFA schools. This report will encompass the nation with information gathered from sources

both inside and outside of TeamCFA. The report will be delivered to the COO no later than June first yearly.

(d) January 2016 - August 2017

(i) Build or acquire a minimum of 3, maximum of 5 in the network per year

(e) June 2017 - August 2021

(i) Build or acquire a minimum of 3, maximum of 5 schools per year in network (a maximum of 3 schools per state per year)

(f) Measurement: State Directors will be held responsible as a unit to expansion totals. Growth does not need to be uniform, but growth should be across the nation.

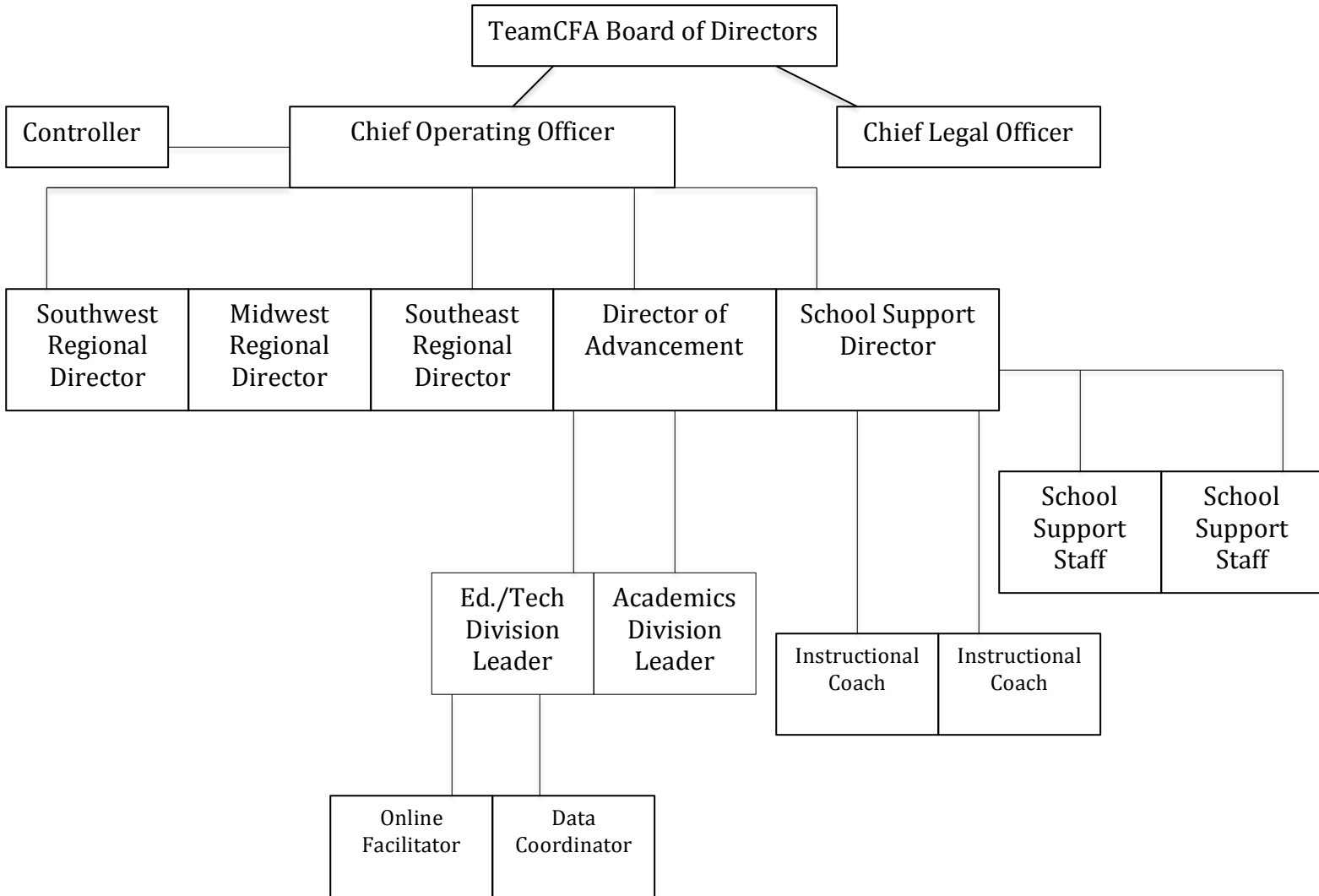
6) Additional strategic objectives to consider:

a) Development of a capability and strategic decision making framework (tool used to identify the most effective states and communities in which to expand)

b) Develop a governance model based on cost/benefit analysis and analysis of past success/failures.

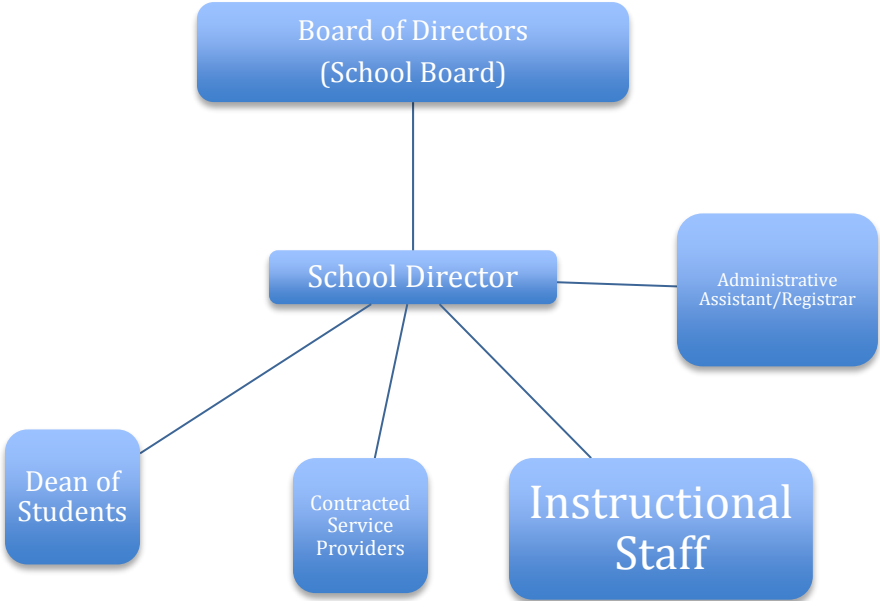
c) Develop a plan for effectively growing the TeamCFA staff based on having people with the right skills and knowledge in the right roles with the right responsibilities

d) Develop a set of guiding principles that are core to the TeamCFA culture and that allow employees, school affiliates and other key stakeholders to make sure we are all functioning based on the same principles in our work.



**TeamCFA Organization Chart**

Rosa Parks: A Challenge Foundation Academy



# **Attachment 11**

## **Course Scope and Sequence**



## Curriculum Alignment 8.23.15

## Singapore Alignment K-8

Supplement	Indiana Academic Standard	CCSS	Description	K	1	2	3	4	5	6	7	8
	MA.K.CA.1	K.OA.1	Represent addition and subtraction within 10	X								
	MA.K.CA.2	K.OA.2, K.O	Solve real-world problems that involve addition and subtraction within 10	X								
	MA.K.CA.3	K.OA.3	Decompose numbers less than or equal to 10	X								
	MA.K.CA.4	K.OA.4	Find the number that adds to make 10	X								
Add	MA.K.CA.5	K.OA.5	Create, give rule for simple repeating and growing patterns	X								
	MA.K.DA.1	K.MD.3	Identify, sort, classify objects and explain reasoning.	X								
	MA.K.G.1	K.G.1	Describe the position of objects in space using appropriate terms	X								
	MA.K.G.2	K.G.2	Compare 2D and 3D shapes	X								
	MA.K.G.3	K.G.3	Model shapes in the world using objects and drawing shapes	X								
	MA.K.G.4	K.G.4	Compose simple geometric shapes to form larger shapes	X								
	MA.K.M.2		Understand concepts of time, including clocks and calendars	X								
	MA.K.NS.1	K.CC.1, 1.N	Count to 100 by tens and ones	X	X							
	MA.K.NS.1	K.CC.2	Count forward beginning from any number	X								
	MA.K.NS.1, MA.1.NS.2	K.NBT.1, 1.	Recognize the place-value of tens and ones	X	X							
	MA.K.NS.2	K.CC.3	Write and represent numbers from 0-20.	X								
Add	MA.K.NS.3		Finding a number one more or less than whole numbers to 20	X								
	MA.K.NS.4	K.CC.4	Counting objects and understanding number names pair with objects counted	X								
	MA.K.NS.5	K.CC.5	Count to answer "How many?" up to 20 in various ways.	X								
Add	MA.K.NS.6		Recognize patterned arrangements of 1-10 objects without counting	X								
	MA.K.NS.7	K.CC.6	Identify whether objects in a group are greater than, less than, or equal to a number of objects in another group.	X								
	MA.K.NS.8	K.CC.7	Compare values of 2 numbers written as numerals.	X								
Add	MA.K.NS.9, MA.K.M.1	K.CC.6, K.M	Use correctly words for comparison	X								
Add	MA.K.NS.10		Separate sets of ten or fewer objects into groups	X								
	MA.K.NS.11	K.NBT.1	Develop initial understanding of place value and the base 10 number system	X	X							
	MA.1.CA.1	1.OA.4	Recognize the relationship between addition and subtraction		X							
	MA.1.CA.1	1.OA.6	Add or subtract within 20 using various strategies including properties of operations		X							
	MA.1.CA.2	1.OA.1	Illustrate the meaning of addition and subtraction, Solve 1-step word problems on addition and subtraction within 20		X							
	MA.1.CA.2	1.OA.1	Write mathematical statements for given situations involving addition or subtraction		X							
	MA.1.CA.2	1.OA.5	Relate counting to addition and subtraction		X							
	MA.1.CA.3		Solve real-world problems that involve addition and subtraction within 20	X	X							
	MA.1.CA.4	1.OA.2	Solve word problems on addition of three 1-digit numbers		X							
	MA.1.CA.4	1.OA.8	Determine the unknown number in addition and subtraction in any position in the equation		X	X						
	MA.1.CA.6	1.OA.7	Determine if equations involving addition and subtraction are true or false, understand the meaning of the equal sign		X							
	MA.1.CA.6	1.OA.7	Understand the meaning of the equal sign		X							
	MA.1.CA.7		Describe and extend regular number patterns within 100		X							
	MA.1.CA.5	1.NBT.4	Add within 100 using concrete models or drawing and strategies based on place value concepts and properties of operations, and/or relationship between addition and subtraction		X							
	MA.1.DA.1		Collect, organize, and present data in line plots, bar graphs, and tables		X		X	X				
	MA.1.DA.1	1.MD.4	Organize, represent, and interpret data in a picture graph with up to 3 categories		X							
	MA.1.G.1		Identify and classify 2D and 3D objects		X							
	MA.1.G.2	1.G.1	Determine if a shape is open or closed. Group simple shapes according to orientation		X	X						
	MA.1.G.2	1.G.1	Group triangles, circles, squares, and rectangles according to shape, size, or color		X							
	MA.1.G.3	1.G.2	Create a composite shape with 2-dimensional figures. Create a composite shape with solids		X							
	MA.1.G.4	1.G.3	Divide a shape into halves or fourths. Count the number of parts (2 or 4) in the whole		X							
	MA.1.M.1	1.MD.1	Compare the length of two or more objects in non-standard units		X							

Curriculum Alignment 8.23.15  
Singapore Alignment K-8

Supplement	Indiana Academic Standard	CCSS	Description	K	1	2	3	4	5	6	7	8
	MA.1.M.1	1.MD.2	Measure length in non-standard units		X							
	MA.1.M.2	1.MD.3	Tell and write time in hours and half-hours using analog and digital clocks		X							
Add	MA.1.M.3		Find the value of a collection of pennies, nickels, and dimes		X							
	MA.1.NS.1	1.NBT.1	Count to 120 and read and write numbers to 120. Read and write numbers up to 100 in numerals, words, and expanded form		X							
	MA.1.NS.1	1.NBT.1	Represent a given number by a set of objects		X							
Add	MA.1.NS.2, MA.1.NS.6	1.NBT.2	Understand that two digits of a two-digit number represent amounts of tens and ones		X							
	MA.1.NS.3		Use ordinal numbers such as first, second, third up to tenth		X							
	MA.1.NS.4	1.NBT.3	Compare two 2-digit numbers using place-value. Use the symbols ">" and "<" to compare two numbers within 100		X							
	MA.1.NS.5	1.NBT.5	Mentally find 10 more or 10 less than a number within 100		X							
	MA.1.NS.5	1.NBT.6	Add/subtract tens to/from a 2-digit number using various strategies		X							
	MA.2.CA.1	2.NBT.5	Subtract 2-digit numbers using strategies based on place-value, properties of operations, and relationship between addition and subtraction		X	X						
	MA.2.CA.1	2.NBT.5	Fluently add/subtract 2-digit numbers using concrete models or drawing and strategies based on place-value concepts and properties of operations, and/or relationship between addition and subtraction		X	X						
	MA.2.CA.1	2.OA.2	Commit addition within 20 to memory. Mentally add or subtract within 20 using various strategies		X	X						
	MA.2.CA.2	2.OA.1	Solve 1-step word problems on addition and subtraction within 100		X	X						
	MA.2.CA.3	2.MD.5	Use addition and subtraction within 100 to solve word problems using lengths given in the same unit			X						
	MA.2.CA.4	2.NBT.6	Add up to four 2-digit numbers			X						
	MA.2.CA.4	2.NBT.7	Add and subtract within 1,000 using concrete models and various strategies based on place-value			X						
	MA.2.CA.4	2.NBT.8	Mentally add or subtract 10 or 100 to or from a number 100-900			X						
	MA.2.CA.5	2.OA.4	Use addition to find the total number of objects in a rectangular array up to 5 rows and 5 columns		X	X						
	MA.2.CA.6	1.OA.3	Apply properties of operations as strategies to add and subtract		X							
	MA.2.CA.6	2.NBT.9	Explain why various addition and subtraction strategies work			X						
	MA.2.DA.1	2.MD.10	Organize, represent, and interpret data in a picture and bar graph with up to 4 categories and single unit scale		X	X						
	MA.2.G.1	2.G.1	Identify cubes, triangles, quadrilaterals, pentagons and hexagons. Recognize and draw shapes having specified attributes				X					
Add	MA.2.G.2		Create squares, rectangles, triangles, cubes, right rectangular prisms using appropriate materials.			X						
Add	MA.2.G.3		Investigate and predict the result of composing and decomposing 2- and 3-dimensional shapes			X						
	MA.2.G.4	2.G.2	Partition a rectangle into rows and columns of squares and count to find the total number			X						
	MA.2.G.5	2.G.3	Partition shapes into up to 4 equal shares in different ways and use the words halves, thirds, etc.			X						
Add	MA.2.M.1		Describe relationships among inch, foot, and yard. Describe relationship between centimeter and meter.			X						
	MA.2.M.2	2.MD.1	Measure length using appropriate tools such as rulers, yardsticks, meter sticks, and measuring tools			X						
	MA.2.M.2	2.MD.3	Estimate and measure length in meters, centimeters, feet, or inches			X						
	MA.2.M.2	2.MD.4	Measure to find out how much longer one object is than another and find the difference in length			X						
	MA.2.M.2	2.MD.9	Repeatedly measure lengths of objects to the nearest whole units and plot the data on a line plot			X						
	MA.2.M.3	2.MD.2	Measure the length of an object using different units and describe how the measurement relates to the unit size			X						
Add	MA.2.M.4		Estimate and measure volume (capacity) using cups and pints			X						
	MA.2.M.5	2.MD.7	Tell and write time to the nearest 5 minutes from analog and digital clocks. Use a.m. and p.m.			X						
	MA.2.M.6		Know relationships of time (years, months, days, weeks, hours, and seconds)			X						
	MA.2.M.7	2.MD.8	Solve word problems involving counting dollar bills, quarters, dimes, nickels and pennies. Use \$ and ¢ symbols appropriately.			X						
	MA.2.NS.2	2.NBT.2	Count to 1,000 by hundreds, tens, and ones			X						
	MA.2.NS.2	2.NBT.2	Count in steps of 5 and 10		X	X						
	MA.2.NS.3	2.MD.6	Represent whole numbers within 100 on a number line. Show sums and differences on a number line			X						
Add	MA.2.NS.4		Use ordinal numbers such as first, second, third up to 30 items			X						
	MA.2.NS.5	2.OA.3	Determine whether a group of objects within 20 has an odd or even number of members			X						
	MA.2.NS.6	2.NBT.1	Recognize place values of hundreds, tens, and ones			X						

## Curriculum Alignment 8.23.15

## Singapore Alignment K-8

Supplement	Indiana Academic Standard	CCSS	Description	K	1	2	3	4	5	6	7	8
	MA.2.NS.7	2.NBT.3	Read and write numbers up to 1,000 in numerals, words, and expanded form			X						
	MA.2.NS.7	2.NBT.4	Compare two 3-digit numbers using place-value and use the symbols ">" and "<"			X						
Add	MA.3.AT.1		Solve word problems involving addition and subtraction of whole numbers within 1000 (e.g. using drawings and equations with symbol for unknown)			X						
	MA.3.AT.2	3.OA.3	Solve word problems involving multiplication/division within 100 involving equal groups, arrays, and measurement quantities (e.g. using drawings and equations with symbol for unknown)			X	X					
	MA.3.AT.3	3.OA.8	Solve up to 2-step word problems involving the four operations on whole numbers				X					
	MA.3.AT.3	3.OA.8	Use estimation to verify the reasonableness of calculated results in addition and subtraction				X	X	X			
	MA.3.AT.3	3.OA.8	Use estimation to verify the reasonableness of calculated results in multiplication and division				X	X	X			
	MA.3.AT.3	3.OA.8	Write equations for word problem situations using a letter to stand for the unknown quantity				X					
	MA.3.AT.4	3.OA.1	Interpret products of whole numbers as the total number of objects in equal groups		X	X	X					
	MA.3.AT.5, MA.4.AT.2	3.OA.4	Determine the unknown number in a multiplication or division equation			X	X					
	MA.3.AT.6	3.OA.9	Describe/extend regular number patterns within 10,000. Recognize/extend regular linear patterns involving multiplication				X					
	MA.3.C.1, MA.2.CA.7	3.NBT.2	Add and subtract within 1,000 using various strategies based on place-value and order of operations			X	X					
	MA.3.C.2	3.MD.7b	Represent whole number of products as rectangular arrays			X	X					
	MA.3.C.2		Multiply a whole number within 1,000 by a 1-digit whole number using strategies based on place-value and properties of operations and illustrate using equations and arrays				X					
	MA.3.C.3, MA.4.AT.2		Represent the concept of division of whole numbers as partitioning, sharing, and the inverse of multiplication				X	X				
	MA.3.C.4	3.OA.2	Interpret whole number quotients of whole numbers as sharing into equal groups or making equal groups			X	X					
	MA.3.C.5	3.NBT.3	Multiply tens within the range 10-90 by a 1-digit number				X					
	MA.3.C.5	3.OA.5	Apply properties of operations as strategies to multiply and divide			X	X					
	MA.3.C.5, MA.4.AT.2	3.OA.6	Understand division as unknown factor problems			X	X					
	MA.3.C.6		Build the multiplication tables of 0-10 and commit to memory			X						
	MA.3.DA.1	3.MD.3	Organize, represent, and interpret data in bar and picture graphs with a scale representation			X	X					
	MA.3.DA.2	3.MD.4	Generate measurement data by measuring lengths to the nearest half or fourth of an inch and record the data in a line plot				X					
	MA.3.G.1		Identify cubes, spheres, prisms, pyramids, cones, and cylinders.			X	X					
	MA.3.G.2, MA.4.G.1	3.G.1	Categorize some shapes, including quadrilaterals. Draw quadrilaterals that are not rhombuses, rectangles, or squares. Identify rhombuses, rectangles, and squares as examples of quadrilaterals				X					
	MA.3.G.3, MA.4.G.4	4.G.1	Identify and draw points, line segments, and rays				X	X				
	MA.3.G.4	3.G.2	Partition shapes into parts with equal area and express the area as a unit fraction of the whole			X	X					
	MA.3.M.1	3.MD.2	Compare the mass of two or more objects in non-standard units. Estimate and measure in liters, kilograms, or grams		X							
	MA.3.M.1	3.MD.2	Solve 1-step word problems involving mass or volume in only one unit			X	X					
Add	MA.3.M.2		Choose and use appropriate tools to measure length, width, and temperature. Use quarter-inch, pounds, Celsius, and Fahrenheit.				X					
	MA.3.M.3	3.MD.1	Solve word problems involving the addition and subtraction of time in minutes using a number line. Tell time to the minute.			X	X					
	MA.3.M.4		Count combinations of coins up to 100 cents or bills up to 100 dollars		X							
	MA.3.M.4		Match one coin or bill of one denomination to an equivalent set of coins and bills of another denomination		X							
	MA.3.M.4		Count combinations of bills and coins to \$10.00			X						
	MA.3.M.5	3.MD.5	Find the area of shapes by covering them with unit squares or by counting squares				X					

Curriculum Alignment 8.23.15  
Singapore Alignment K-8

Supplement	Indiana Academic Standard	CCSS	Description	K	1	2	3	4	5	6	7	8
	MA.3.M.5	3.MD.6	Measure areas by counting squares in nonstandard units				X					
	MA.3.M.5	3.MD.6	Measure areas by counting squares in standard units (square cm, square in., square ft.)				X					
	MA.3.M.5	3.MD.7a	Derive the formula for area of a rectangle					X				
	MA.3.M.6	3.MD.7b	Use the formula to calculate the area of rectangles with whole number side lengths					X				
	MA.3.M.7	3.MD.8	Exhibit rectangles with same perimeter and different area, or same area and different perimeter				X					
	MA.3.M.7	3.MD.8	Find an unknown side length of a polygon given the length of the other sides				X	X				
	MA.3.M.7	3.MD.8	Find the perimeter of polygons				X					
	MA.3.NS.1		Read and write numbers up to 10,000 in numerals, words, and expanded form, and recognize the place value of each digit				X					
	MA.3.NS.2		Compare and order numbers within 10,000				X					
	MA.3.NS.3	3.NF.1	Understand a fraction $1/b$ as the quantity formed by 1 part when a whole is partitioned into $b$ equal parts. Understand $a/b$ is a quantity formed by parts of size $1/b$ .			X	X					
	MA.3.NS.3	3.NF.3c	Express whole numbers as a fraction and recognize fractions that are equivalent to whole numbers					X				
	MA.3.NS.4	3.NF.2	Represent and understand fractions on number lines					X				
	MA.3.NS.4	3.NF.2a	Represent a fraction, $1/b$ , on a number line and partition in to equal parts equal to $1/b$ .				X					
	MA.3.NS.5	3.NF.2b	represent a fraction, $a/b$ , on a number line by marking of lengths $1/b$ from 0.				X					
	MA.3.NS.6	3.NF.3a	Recognize and name equivalent fractions using number lines				X	X				
	MA.3.NS.7	3.NF.3b	Write equivalent fractions of a given fraction				X					
	MA.3.NS.8	3.NF.3d	Compare two fractions with the same numerator or denominator, and use the symbols " $>$ ", " $<$ " and " $=$ "				X					
	MA.3.NS.9	3.NBT.1	Round numbers within 10,000 to the nearest 10 or 100				X					
	MA.4.AT.1	4.OA.3	Assess the reasonableness of answers to multi-step word problems involving the four operations using mental computation and estimation					X				
	MA.4.AT.2		Determine an unknown addend in an addition equation. Illustrate the meaning of multiplication as repeated addition.		X	X						
	MA.4.AT.2		Multiply numbers whose product is not greater than 40, using repeated addition to find the answer		X							
	MA.4.AT.2		Relate division to multiplication with a missing factor			X	X					
	MA.4.AT.3	4.OA.1	Interpret multiplication equation as a comparison (times as many)			X	X	X				
	MA.4.AT.4	4.OA.2	Distinguish additive comparison from multiplicative comparison			X	X	X				
	MA.4.AT.4	4.OA.2	Multiply or divide to solve word problems involving multiplicative comparison (times as many) using drawings and equations with a symbol for the unknown number			X	X	X				
	MA.4.AT.5	4.NF.3d	Solve word problems involving addition and subtraction of like fractions					X				
	MA.4.AT.6	4.OA.5	Generate a shape and number pattern that follows given rules					X				
	MA.4.AT.6	4.OA.5	Identify apparent features of the pattern that were not evident in the rule itself					X				
	MA.4.C.1	4.NBT.4	Add and subtract multi-digit whole numbers using the standard algorithm			X	X	X				
	MA.4.C.2	4.NBT.5	Illustrate multiplication of 10,000 by a 1-digit whole number and multiplication of two 2-digit numbers with arrays and/or area models					X				
	MA.4.C.2	4.NBT.5	Multiply a whole number within 10,000 by a 1-digit whole number using strategies based on place-value and properties of operations and illustrate using equations					X				
	MA.4.C.2	4.NBT.5	Multiply two 2-digit numbers, using strategies based on place-value and properties of operations and illustrate using equations					X				
	MA.4.C.3	4.NBT.6	Illustrate division of a whole number within 10,000 by a 1-digit whole number with arrays and/or area models					X				
	MA.4.C.3, MA.4.AT.2	4.NBT.6	Divide a number within 10,000 by a 1-digit whole number, using strategies based on place-value and properties of operations, and relationship between multiplication and division and illustrate with equations					X				
	MA.4.C.4	3.OA.7	Build the multiplication tables up to $10 \times 10$ and commit to memory				X					
	MA.4.C.5	4.NF.3a	Understand adding and subtracting fractions as joining and separating fractions of the same whole				X	X				
	MA.4.C.5	4.NF.3b	Decompose a fraction into the sum of fractions with the same denominator in different ways					X				
	MA.4.C.7	3.MD.7c	Use tiling and area to illustrate the distributive property						X			

Curriculum Alignment 8.23.15  
Singapore Alignment K-8

Supplement	Indiana Academic Standard	CCSS	Description	K	1	2	3	4	5	6	7	8
Add	MA.4.C.7		Show how the communicative property and associative property will not change the product. Use and understand the distributive property.					X				
	MA.4.DA.2	4.MD.4	Add and subtract fractions in fourths, halves, and eighths					X				
	MA.4.DA.2	4.MD.4	Make a line plot to display a data set of measurements in fractions (1/2, 1/4, or 1/8). Solve problems involving addition or subtraction of fractions using information in the line plots.					X				
	MA.4.DA.3		Collect, organize and display data in pie charts						X			
	MA.4.G.1		Draw squares, rectangles, parallelograms and triangles given dimensions (side lengths and angles) and/or using the appropriate tools					X	X			
	MA.4.G.1		Recognize and name parallelograms. Recognize and name trapezoids, using the exclusive definition of a trapezoid					X				
	MA.4.G.1, MA.4.G.5	4.G.2	Recognize and name trapezoids, using the inclusive definition of a trapezoid					X				
	MA.4.G.2	4.G.3	Recognize symmetric figures and lines of symmetry, draw lines of symmetry					X				
	MA.4.G.3, MA.4.M.5	4.MD.5	Recognize angles as shapes formed whenever two rays share an endpoint					X				
	MA.4.G.4	4.G.1	Identify and draw acute and obtuse angles. Identify and draw perpendicular and parallel lines.					X				
	MA.4.G.4, MA.4.M.6	4.MD.6	Draw angles of specified measure					X				
	MA.4.G.5	4.G.2	Classify 2-D figures based on presence or absence of parallel or perpendicular lines, or angles of a specified size					X				
	MA.4.G.5	4.G.2	Recognize and name right triangles				X	X				
Add	MA.4.M.1		Choose and use appropriate tools to measure length, width, and temperature. Use quarter-inch, eighth-inch, and millimeter					X				
	MA.4.M.2	4.MD.1	Convert a measure in a larger unit to a smaller unit. Record measurement equivalencies in a two-column table.				X	X				
	MA.4.M.2	4.MD.1	Visualize the relative magnitudes of hours, minutes, and seconds and convert from the larger unit to the smaller unit				X	X				
	MA.4.M.2	4.MD.1	Visualize the relative magnitudes of standard measurements of length, mass, capacity, weight, and time			X	X	X				
	MA.4.M.3	4.MD.2	Solve word problems involving the four operations and length, capacity and mass, including simple fractions or decimals, converting from larger to smaller representing the measurements using diagrams such as number lines featuring a measurement scale					X				
	MA.4.M.3	4.MD.2	Solve word problems involving the four operations and money, including simple fractions or decimals, converting from larger to smaller unit					X				
	MA.4.M.3	4.MD.2	Solve word problems involving the four operations and time including simple fractions or decimals					X				
	MA.4.M.3	4.MD.2	Use the four operations to solve word problems involving measurement and simple decimals					X				
	MA.4.M.4	3.MD.7d	Find the area of simple composite figures made up of rectangles and solve problems					X				
	MA.4.M.4	4.MD.3	Use the area and perimeter formulas for rectangles in real world and mathematical problems					X				
	MA.4.M.5	4.MD.5a	Understand that 1 degree is 1/360 of a circle					X				
	MA.4.M.5	4.MD.5b	Understand that that an angle that turns through n degrees has a measure of n degrees.					X				
	MA.4.M.6	4.MD.6	Measure angles with a protractor					X				
	MA.4.NS.1	4.NBT.2	Compare two numbers within 1,000,000 based on place-values, using >, <, and =					X				
	MA.4.NS.2	4.NBT.2	Read and write whole numbers up to 1,000,000 using base-ten numerals, number names, and expanded form, and recognize the place value of each digit					X				
	MA.4.NS.3, MA.4.C.6	4.NF.3c	Add and subtract mixed numbers with like fractions					X	X			
	MA.4.NS.4	4.NF.1	Recognize and generate equivalent fractions. Use diagrams to explain equivalent fractions				X	X				
	MA.4.NS.4	4.NF.5	Express a fraction with a denominator of 10 as an equivalent fraction with denominator of 100, and add/subtract fractions with denominators of 10 or 100					X				
	MA.4.NS.5	4.NF.2	Compare fraction to benchmark fractions such as 1/2. Compare two unrelated fractions of the same whole using >, <, and =.					X				
	MA.4.NS.6	4.NF.6	Use decimal notation for fractions with denominators of 10 or 100, locate on a number line					X				
	MA.4.NS.6	5.NBT.3a	Read and write decimals to thousandths using base-ten numerals, number names, and expanded form					X	X			

## Curriculum Alignment 8.23.15

## Singapore Alignment K-8

Supplement	Indiana Academic Standard	CCSS	Description	K	1	2	3	4	5	6	7	8
	MA.4.NS.7	4.NF.7	Compare two decimals to hundredths using $>$ , $<$ , $=$					X				
	MA.4.NS.8	4.OA.4	Determine if a whole number is a multiple of a given 1-digit whole number					X				
	MA.4.NS.8	4.OA.4	Identify composite and prime numbers within 100. List the factors of a whole number up to 100.					X				
	MA.4.NS.8	4.OA.4	Recognize that a whole number is a multiple of its factors					X				
	MA.4.NS.9	4.NBT.3	Round numbers within 1,000,000 to any place					X				
	MA.5.AT.1	4.OA.3	Represent word problems using equations with a letter standing for the unknown quantity					X				
	MA.5.AT.1	4.OA.3	Solve multi-step word problems involving the 4 operations on whole numbers					X	X			
	MA.5.AT.2	5.NF.2	Solve word problems involving addition and subtraction of fractions using visual fraction models or equations					X	X			
	MA.5.AT.2	5.NF.2	Use benchmark fractions and number sense of fractions to estimate and assess reasonableness of answers involving addition and subtraction of fractions						X			
	MA.5.AT.3	5.NF.6	Solve real world problems involving multiplication of fractions and mixed numbers using fraction models or equations						X			
	MA.5.AT.4	5.NF.7c	Solve real world problems involving division of unit fractions by a whole number or whole number by a unit fraction using fraction models and equations						X			
Add	MA.5.AT.5		Solve real world problems involving addition, subtraction, multiplication, and division with decimals to hundredths, including money in decimal notation						X			
	MA.5.AT.6	5.G.1	Understand the coordinate plane, x and y axis and coordinates, and plot ordered pairs (first quadrant)					X	X			
	MA.5.AT.7	5.G.2	Graph points on a coordinate plane and interpret values in context of real-world and mathematical situation						X			
Add	MA.5.AT.8, MA.6.AF.3, MA.6.GM.1		Define and use up to two variables to write linear expressions that arise from real-world problems, and evaluate them for given values						X	X		
	MA.5.C.1	5.NBT.5	Multiply multi-digit whole numbers using the standard algorithm		X			X	X			
	MA.5.C.2	5.NBT.6	Find whole number quotients of whole numbers with up to 4-digit dividends and 2-digit divisors, using strategies base on place value, properties of operations, relationship between multiplication and division and illustrate using equations		X				X			
	MA.5.C.2	5.NBT.6	Illustrate 4-digit by 2-digit division with whole number quotients using rectangular arrays and/or area models		X							
	MA.5.C.3	5.NF.5a	Compare the size of the product to the size of one factor, without multiplying						X			
	MA.5.C.4	5.NF.1	Add and subtract unlike fractions, including mixed numbers						X			
	MA.5.C.5	4.NF.4a	Understand fractions as a multiple of unit fractions				X	X				
	MA.5.C.5	4.NF.4b	Multiply fractions by a whole number using understanding of fractions as multiples of multiples of unit fractions						X			
	MA.5.C.5	4.NF.4c	Solve word problems involving multiplication of fractions by a whole number using concepts of multiples of a unit fraction						X			
	MA.5.C.5	5.NF.4a	Find fraction of a set by interpreting $a/b \times q$ as $a \times q \div b$ (including mixed number answers)						X			
	MA.5.C.5	5.NF.4a	Find fraction of a set by interpreting $a/b \times q$ as $a \times q \div b$ (whole number answers)				X	X	X			
	MA.5.C.6	5.NF.5b	Explain why multiplying a number by a fraction greater than 1 results in a product greater than the given number						X			
	MA.5.C.6	5.NF.5b	Explain why multiplying a number by a fraction smaller than 1 results in a product smaller than the given number						X			
	MA.5.C.6	5.NF.5b	Relate fractions equivalence $a/b = (ma)/(mb)$ to multiplying by 1					X	X			
	MA.5.C.7	5.NF.7a	Interpret division of a unit fraction by a whole number and find the quotient						X			
	MA.5.C.7	5.NF.7b	Interpret division of a whole number by a unit fraction and find the quotient						X			
	MA.5.C.8	5.NBT.7	Add and subtract decimals to hundredths, using concrete models or drawings and strategies based on place value, properties of operation					X	X			
	MA.5.C.8	5.NBT.7	Multiply and divide decimals to hundredths, using concrete models or drawings and strategies based on place value, properties of operation						X			
	MA.5.C.9	5.OA.1	Use parentheses, brackets, or braces in numerical expressions and evaluate the expressions (including nested)						X			
	MA.5.DS.1	5.MD.2	Make a line plot to display a data set of measurements in fractions ( $1/2$ , $1/4$ , or $1/8$ ). Use operations on fractions to solve problems involving information in the line plot, such as finding the average						X			
	MA.5.DS.2		Identify the mode and median of categorical data. Understand, find, and compare mean, median, and mode of a set of data.					X	X			
Add	MA.5.G.1		Identify, describe, and draw triangles and circles using appropriate tools. Find the radius and diameter of a circle						X			

Curriculum Alignment 8.23.15  
Singapore Alignment K-8

Supplement	Indiana Academic Standard	CCSS	Description	K	1	2	3	4	5	6	7	8
	MA.5.G.1		Understand the relationship between radius and diameter						X			
	MA.5.G.2	5.G.3	Understand that attributes belonging to a category of 2-dimensional figures belong to all subcategories of that category					X	X			
	MA.5.G.2	5.G.4	Classify 2-D figures in a hierarchy based on properties					X	X			
	MA.5.M.1	5.MD.1	Convert between measurements within the same system using decimals in solving multi-step real-world problems						X			
	MA.5.M.2	5.NF.4b	Find the area of a rectangle with fractional side lengths by tiling it with unit squares of unit fractions and show that area is the same as would be found by multiplying the side lengths. Represent fraction product as rectangular areas.						X			
	MA.5.M.3		Derive the formula for area of a parallelogram and find the area of parallelograms						X			
Add	MA.5.M.3		Derive the formula for area of a trapezoid and find the area of trapezoids						X			
	MA.5.M.3		Derive the formula for the area of a triangle and find the area of a triangle given the base and height						X			
	MA.5.M.4	5.MD.3	Understand that volume can be measured with unitcubes				X	X	X			
	MA.5.M.4	5.MD.4	Measure volume by counting unit cubes of standard units. Measure volumes by counting unit cubes of nonstandard units					X	X			
	MA.5.M.4	5.MD.5a	Derive the formula $V = b \times h$ . Derive the formulas $V = l \times w \times h$						X			
	MA.5.M.5	4.MD.5a	Understand that angles are measured with reference to degree of turning in a circle					X				
	MA.5.M.5	5.MD.5b	Find the volume of right rectangle prisms with whole number side length given the lengths and solve word problems					X	X			
	MA.5.M.6	5.MD.5c	Find to volume of compound figures made of right rectangular prisms and solve word problems						X			
	MA.5.NS.1	5.NBT.3b	Compare two decimals to thousandths based on place value using symbols $>$ , $<$ , and $=$					X	X			
	MA.5.NS.2	5.NF.3	Interpret a fraction as division of the numerator by the denominator and solve word problems involving division of whole numbers, expressing the quotient as a mixed number					X	X			
	MA.5.NS.3	4.NBT.1	Recognize that in a multi-digit whole number, a digit in one place represents ten times what it represent in the place to its right			X	X	X				
	MA.5.NS.3	5.NBT.1	Recognize that in a multi-digit number, a digit in one place represents ten times what it represent in the place to its right and $1/10$ of what it represents to the left					X	X			
	MA.5.NS.4	5.NBT.2	Explain patterns in the number of zeros of the product when multiplying a number by powers of 10					X	X			
	MA.5.NS.4	5.NBT.2	Explain patterns in the placement of the decimal point when a decimal is multiplied or divided by a power of 10						X			
	MA.5.NS.4	5.NBT.2	Use whole number exponents to denote powers of 10						X			
	MA.5.NS.5	5.NBT.4	Round decimals to any place						X			
Add	MA.5.NS.6		Understand, interpret, and model percents as part of a hundred						X			
Add	MA.6.AF.1		Evaluate expressions for specific values of their variables, including expressions with whole-number exponents and those that arise from formulas using real-world problems						X			
	MA.6.AF.2, MA.7.AF.1	7.EE.1	Apply properties of operations to create equivalent linear expressions							X		
	MA.6.AF.4	7.EE.3	Understand that solving an equation or inequality is the process of finding what makes an equation or inequality true. Use substitution.							X	X	
Add	MA.6.AF.5, MA.7.AF.2	7.EE.4AB	Solve equations of the form $px+q=r$ and $p(x+q)=r$ fluently. Represent real-world problems using equations							X	X	
	MA.6.AF.6		Write an inequality where $c$ is a rational number to represent a real problem. Recognize that inequalities have infinitely many solutions							X		
	MA.6.AF.7	5.OA.3	Understand the signs of numbers in ordered pairs determine quadrants. Generate numerical patterns using two given rules, identify relationships between corresponding terms, create ordered pairs, and graph on a coordinate plane					X	X			
Add	MA.6.AF.8		Solve real-world and mathematical problems by graphing points on a coordinate plane							X	X	
	MA.6.AF.9		Make tables of equivalent ratios relating quantities with whole-number measurements							X		
	MA.6.C.1		Divide whole numbers up to 4 digits by whole numbers up to 2-digits, with whole number remainders, using the standard algorithm						X			
	MA.6.C.2		Compute with positive fractions and positive decimals fluently using standards algorithmic approach							X		
Add	MA.6.C.3		Solve real-world problems with positive fractions and decimals by using one or two operations							X		
Add	MA.6.C.4		Solve real-world problems involving division of fractions by fractions. Use visual fraction model and/or equation.							X		













INDIANA 2014 STATE STANDARDS FOR ENGLISH LANGUAGE ARTS & LITERACY IN HISTORY/SOCIAL STUDIES, SCIENCE, AND TECHNICAL SUBJECTS

**Reading Standards for Literature K–8**

College and Career Readiness Anchor:	Kindergarten:	Grade 1:	Grade 2:	Grade 3:	Grade 4:	Grade 5:	Grade 6–8:
<b>Key Ideas and Details</b>							
1. Read closely to determine what the text says explicitly and to make logical inferences from it; cite specific textual evidence when writing or speaking to support conclusions drawn from the text.	~ WPS, ask and answer questions about key details K.RL.1, K.RL.2.1	~ WPS, read and comprehend literature that is grade-level appropriate ~ Ask and answer questions about key details ~ Make predictions about what will happen next in the text 1.RL.1, 1.RL.2.1, 1.RL.2.4	~ Ask and answer: <i>who, what, where, when, why, how</i> ~ Demonstrate understanding ~ Make predictions about the content of the text using prior knowledge, explaining whether or not they were confirmed 2.RL.2.1, 2.RL.2.4	~ Ask and answer questions ~ Demonstrate understanding ~ Refer explicitly to text 3.RL.1, 3.RL.2.1	~ Refer to details and examples ~ Explain text explicitly ~ Draw inferences from text 4.RL.1, 4.RL.2.1	~ Quote from text ~ Explain text explicitly ~ Draw inferences from text 5.RL.1, 5.RL.2.1	~ Cite textual evidence ~ Support analysis of text message and inferences 6-8.RL.1, 6-8.RL.2.1
2. Determine central ideas or themes of a text and analyze their development; summarize the key supporting details and ideas.	~ WPS, retell stories ~ Include key details ~ Make predictions about what will happen in a story K.RL.1, K.RL.2.1, K.RL.2.2, K.RL.2.4	~ WPS, read and comprehend literature that is grade-level appropriate ~ Retell stories ~ Include key details ~ Demonstrate understanding 1.RL.1, 1.RL.2.2	~ Recount stories ~ Determine central message 2.RL.1, 2.RL.2.2	~ Recount stories ~ Determine central message ~ Explain how details convey central message 3.RL.1, 3.RL.2.2	~ Determine theme ~ Summarize text 4.RL.1, 4.RL.2.2	~ Determine theme, using character response to challenges and narrator reflection ~ Summarize text 5.RL.1, 5.RL.2.2	~ Determine theme ~ Analyze theme development ~ Provide an objective summary of text 6-8.RL.1, 6-8.RL.2.2
3. Analyze how and why individuals, events, and ideas develop and interact over the course of a text.	~ WPS, identify characters, settings, and major events K.RL.1, K.RL.2.3	~ Describe characters, settings, and major events ~ Include key details 1.RL.2.3	~ Describe characters' responses to major events and challenges 2.RL.1, 2.RL.2.3	~ Describe characters ~ Explain how characters' actions contribute to sequence of events 3.RL.1, 3.RL.2.3	~ Describe characters in depth ~ Draw on specific details 4.RL.1, 4.RL.2.3	~ Compare and contrast characters, settings, or events ~ Draw on specific details 5.RL.1, 5.RL.2.3	~ Analyze how dialogue and events contribute to plot sequence and/or character development 6-8.RL.1, 6-8.RL.2.3
<b>Craft and Structure</b>							
4. Interpret words and phrases as they are used in a text, including determining technical, connotative, and figurative meanings, and analyze how specific word choices shape meaning or tone.	~ Ask and answer questions about unknown words K.RL.1, K.RV.3.1, K.RV.3.2, K.SL.2.4, K.SL.3.2	~ Identify words that suggest feelings or appeal to the senses ~ Use key details from the text 1.RL.2.2, 1.RL.2.3, 1.RV.3.1	~ Describe how words and phrases supply rhythm and meaning 2.RL.1, 2.RV.3.1	~ Determine word meaning using text ~ Distinguish literal from nonliteral language ~ Recognize the meanings of idioms in context 3.RV.2.1, 3.RV.2.4, 3.RV.3.1, 3.RV.3.3	~ Determine word meaning using text, including those that allude to mythological characters 4.RV.2.1, 4.RV.2.4	~ Determine word meaning using text, including figurative language 5.RV.2.1, 5.RV.2.2, 5.RV.2.4, 5.RV.3.1, 5.RV.3.3	~ Determine word meaning, including figurative and connotative meanings ~ Analyze the impact of word choice 6-8.RV.1, 6-8.RV.2.1, 6-8.RV.2.2, 6-8.RV.2.3, 6-8.RV.2.4, 6-8.RV.2.5, 6-8.RV.3.1, 6-8.RV.3.2, 6-8.RV.3.3
5. Analyze the structure of texts, including how specific sentences, paragraphs, and larger portions of the text (e.g., a section, chapter, scene, or stanza) relate to each other and the whole.	~ Recognize common text types K.RL.3.1	~ Explain major differences between literary and informational texts; draw on a range of text types 1.RL.3.1	~ Describe story structure, including introductions and conclusions 2.RL.3.1	~ Refer to story parts when writing or speaking ~ Describe story part succession 3.RL.3.1	~ Explain major differences between texts ~ Refer to structural elements when writing or speaking 4.RL.3.1	~ Explain how story parts provide overall structure 5.RL.3.1	~ Analyze how story structure contributes to meaning and tone 6-8.RL.3.1
6. Assess how point of view or purpose shapes the content and style of a text.	~ WPS, name author and illustrator; define role of each K.RL.3.2	~ Identify narrator at various points in the text 1.RL.3.2	~ Acknowledge differences in points of view ~ Speak in different voices for different characters 2.RL.3.2	~ Distinguish own point of view from characters or narrator 3.RL.3.2	~ Compare and contrast narration, including first- and third person story narrations 4.RL.3.2	~ Describe how point of view influences event descriptions 5.RL.3.2	~ Analyze the points of view of characters, narrators, and audience (Grades 6&7) ~ Analyze a particular point of view in a work, considering how it reflects heritage and culture. (Grade 8) 6-8.RL.3.2

Curriculum Alignment 8.23.15  
CK Alignment K-8

College and Career Readiness Anchor:	Kindergarten:	Grade 1:	Grade 2:	Grade 3:	Grade 4:	Grade 5:	Grade 6–8:
<b>Integration of Knowledge and Ideas</b> 7. Integrate and evaluate content presented in diverse media and formats, including visually and quantitatively, as well as in words.	~ WPS, describe illustration and story relationship  K.ML.1, K.RL.4.1	~ Use illustrations and details to describe story elements  1.RL.4.1	~ Use illustrations and words to demonstrate understanding of story elements  2.RL.4.1	~ Explain how illustration aspects contribute to story elements  3.RL.4.1	~ Make connections between text and illustration ~ Identify where each reflects message  4.RL.2.1, 4.RL.4.1	~ Analyze visual and multimedia elements ~ Identify how information found in electronic print and mass media is used to inform, persuade, entertain, and transmit culture ~ Review claims made in various types of media and evaluate evidence to support those claims ~ Identify the role of the media in focusing people's attention on events and in forming their opinions on issues  5.RL.4.1, 5.ML.1, 5.ML.2.1, 5.ML.2.2	~ Compare and contrast and analyze written stories from alternative production formats  6-8.RL.4.1
8. Delineate and evaluate the argument and specific claims in a text, including the validity of reasoning as well as the relevance and sufficiency of evidence.	~ (Not applicable to literature)	~ (Not applicable to literature)	~ (Not applicable to literature)	~ (Not applicable to literature)	~ (Not applicable to literature)	~ (Not applicable to literature)	~ (Not applicable to literature)
9. Analyze how two or more texts address similar themes or topics in order to build knowledge or to compare the approaches the authors take.	~ WPS, compare and contrast character experiences  K.RL.1, K.RL.4.2	~ Compare and contrast character experiences  1.RL.4.2	~ Compare and contrast different versions of the same story  2.RL.4.2	~ Compare and contrast story elements in a book series  3.RL.4.2	~ Compare and contrast story elements in world literature  4.RL.4.2	~ Compare and contrast story elements in books from same genre  5.RL.4.2	~ Compare and contrast works of literature in different forms or genres in terms of their approaches to similar themes and topics (6th grade) ~ Compare and contrast a fictional portrayal with a historical event as a mean of understanding how authors of fiction use or alter history (7th grade) ~ Analyze how works of literature draw on and transform earlier texts.  6-8.RL.4.2
<b>Range of Reading and Level of Text Complexity</b>							
10. Read and comprehend complex literary and informational texts independently and proficiently.	~ Engage in group reading activities  K.RL.1, K.RF.1	~ WPS, read in grade 1 complexity band  1.RL.1, 1.RF.1	~ Read and comprehend in grades 2–3 complexity band, WPS at high end  2.RL.1, 2.RF.1	~ Read and comprehend in grades 2–3 complexity band  3.RL.1, 3.RF.1	~ Read and comprehend in grades 4–5 complexity band, WPS at high end  4.RL.1, 4.RF.1	~ Read and comprehend in grades 4–5 complexity band  5.RL.1, 5.RF.1	~ Read and comprehend in grades 6–8 complexity band, WPS as needed in grades 6–7  6-8.RL.1

INDIANA 2014 STATE STANDARDS FOR ENGLISH LANGUAGE ARTS & LITERACY IN HISTORY/SOCIAL STUDIES, SCIENCE, AND TECHNICAL SUBJECTS

**Reading Standards for Informational Texts K–8**

College and Career Readiness Anchor:	Kindergarten:	Grade 1:	Grade 2:	Grade 3:	Grade 4:	Grade 5:	Grade 6–8:
<b>Key Ideas and Details</b>							
<i>1. Read closely to determine what the text says explicitly and to make logical inferences from it; cite specific textual evidence when writing or speaking to support conclusions drawn from the text.</i>	~ WPS, ask and answer questions about key details  K.RN.2.1, K.RN.2.2	~ Ask and answer questions about key details  1.RN.1, 1.RN.2.1	~ Ask and answer: who, what, where, when, why, how ~ Demonstrate understanding  2.RN.1, 2.RN.2.1	~ Ask and answer questions ~ Demonstrate understanding ~ Refer explicitly to text  3.RN.1, 3.RN.2.1	~ Refer to details and examples ~ Explain text explicitly ~ Draw inferences from text  4.RN.1, 4.RN.2.1	~ Quote from text ~ Explain text explicitly ~ Draw inferences from text  5.RN.1, 5.RN.2.1	~ Cite textual evidence ~ Support analysis of text message and inferences  6-8.RN.1, 6-8.RN.2.1
<i>2. Determine central ideas or themes of a text and analyze their development; summarize the key supporting details and ideas.</i>	~ WPS, identify topic and retell key ideas  K.RN.2.2	~ Identify topic and retell main ideas  1.RN.1, 1.RN.2.2	~ Identify overall topic ~ Identify focus of specific paragraphs  2.RN.1, 2.RN.2.2	~ Determine main idea ~ Recount key details ~ Explain main idea support  3.RN.1, 3.RN.2.2	~ Determine main idea ~ Explain support ~ Summarize  4.RN.1, 4.RN.2.2	~ Determine multiple main ideas ~ Explain support ~ Summarize  5.RN.1, 5.RN.2.2	~ Determine central idea ~ Analyze idea development ~ Summarize objectively  6-8.RN.1, 6-8.RN.2.2
<i>3. Analyze how and why individuals, events, and ideas develop and interact over the course of a text.</i>	~ WPS, describe connection between two elements  K.RN.2.3	~ Describe connection between two elements  1.RN.1, 1.RN.2.3	~ Describe connection between multiple text elements  2.RN.1, 2.RN.2.3	~ Describe connection between multiple text elements ~ Use proper language  3.RN.1, 3.RN.2.3	~ Explain text elements, based on specific textual information  4.RN.1, 4.RN.2.3	~ Explain relationships between multiple text elements, using specific information  5.RN.1, 5.RN.2.3	~ Analyze how key details are introduced and elaborated in a text ~ Analyze textual connections in detail  6-8.RN.1, 6-8.RN.2.3
<b>Craft and Structure</b>							
<i>4. Interpret words and phrases as they are used in a text, including determining technical, connotative, and figurative meanings, and analyze how specific word choices shape meaning or tone.</i>	~ WPS, ask and answer questions about unknown words  K.RV.3.1, K.RV.3.2, K.SL.2.4, K.SL.3.2	~ Ask and answer questions to determine or clarify word meaning  1.RV.1, 1.RV.2.1, 1.RV.2.4, 1.RV.3.2, 1.SL.2.4, 1.SL.3.2	~ Determine meaning of words and phrases in a grade 2 topic or subject area  2.RV.1, 2.RV.2.1, 2.RV.2.4, 2.RV.3.2	~ Determine meaning of words and phrases in a grade 3 topic or subject area ~ Recognize the meanings of idioms in a text  3.RV.2.1, 3.RV.2.4, 3.RV.3.1, 3.RV.3.3	~ Determine meaning of words and phrases in a grade 4 topic or subject area  4.RV.2.4, 4.RV.2.5, 4.RV.3.1, 4.RV.3.2, 4.RV.3.3	~ Determine meaning of words and phrases in a grade 5 topic or subject area  5.RV.2.1, 5.RV.2.4, 5.RV.2.5, 5.RV.3.2, 5.RV.3.3	~ Determine meaning of complex words and phrases as they are used in a text  6-8.RV.1, 6-8.RV.2.1, 6-8.RV.2.2, 6-8.RV.2.3, 6-8.RV.2.4, 6-8.RV.2.5, 6-8.RV.3.1, 6-8.RV.3.2, 6-8.RV.3.3
<i>5. Analyze the structure of texts, including how specific sentences, paragraphs, and larger portions of the text (e.g., a section, chapter, scene, or stanza) relate to each other and the whole.</i>	~ Identify book parts  K.RN.3.1	~ Know and use text features ~ Locate information  1.RN.3.1	~ Know and use text features ~ Locate information effectively  2.RN.3.1	~ Use text features and search tools ~ Locate information effectively  3.RN.3.1	~ Describe structure of information  4.RN.3.1, 4.RN.3.2	~ Compare and contrast structure of information across texts  5.RN.3.2	~ Analyze the structure of a text, and the role of major sections and sentences  6-8.RN.3.2
<i>6. Assess how point of view or purpose shapes the content and style of a text.</i>	~ Name author and illustrator ~ Define role of each  K.RN.3.1, K.RN.4.1, K.RN.4.2	~ Distinguish illustrations from words  1.RN.3.1	~ Identify author's purpose  2.RN.3.3	~ Distinguish own point of view from author's ~ Distinguish between fact and opinion  3.RN.3.3, 3.RN.4.1	~ Compare and contrast first- and secondhand account ~ Describe differences between accounts ~ Distinguish between fact and opinion  4.RN.3.3, 4.RN.4.1	~ Analyze multiple accounts, noting similarities and differences  5.RN.3.3, 5.RN.4.2	~ Determine author's point of view ~ Analyze how author responds to other viewpoints  6-8.RN.3.3

Curriculum Alignment 8.23.15  
CK Alignment K-8

College and Career Readiness Anchor:	Kindergarten:	Grade 1:	Grade 2:	Grade 3:	Grade 4:	Grade 5:	Grade 6–8:
<b>Integration of Knowledge and Ideas</b> 7. Integrate and evaluate content presented in diverse media and formats, including visually and quantitatively, as well as in words.	~ WPS, describe relationship between text and illustrations ~ Recognize various types of media  K.RN.3.1, K.ML.1	~ Use illustrations and details to describe key ideas ~ Identify how a nonfiction text can be structured in order to explain a cause and effect relationship ~Recognize the role of media in informing, persuading, entertaining, and transmitting culture. ~ Demonstrate understanding of media by asking and answering questions  1.RN.3.1, 1.RN.3.2, 1.ML.1, 1.ML.2.1	~ Explain how images contribute to and clarify a text ~ Identify how a nonfiction text can be structured to compare and contrast, to describe a procedure, and to explain cause and effect ~Recognize the role of media in informing, persuading, entertaining, and transmitting culture. ~Recognize that media can be used for different purposes  2.RV.2.5, 2.RN.3.2, 2.RN.3.3, 2.ML.1, 2.ML.2.1	~ Use illustrations and words to demonstrate understanding of text ~Recognize the role of media in informing, persuading, entertaining, and transmitting culture. ~Recognize that media can be used for different purposes  3.RN.3.1, 3.ML.1, 3.ML.2.1	~ Interpret visual and multimedia information ~ Explain how information contributes to textual understanding ~Identify how information found in media is used to inform, persuade, entertain, and transmit culture ~Recognize claims in media and identify evidence used to support these claims  4.SL.4.1, 4.SL.4.2, 4.ML.1, 4.ML.2.1	~ Draw on information from multiple illustrations or multimedia to answer questions and solve problems ~Identify how information found in electronic print and mass media is used to inform, persuade, entertain, and transmit culture ~ Review claims made in various types of media and evaluate evidence to support those claims ~ Identify the role of the media in focusing people's attention on events and in forming their opinions on issues  5.RN.4.2, 5.ML.1, 5.ML.2.1, 5.ML.2.2	~ Evaluate different forms of media for presenting different ideas ~Critically analyze information found in electronic, print, and mass media used to inform, persuade, entertain, and transmit culture ~Use evidence to evaluate the accuracy of information and ways information is presented in multiple media messages ~Identify target audience of a particular media message ~ Analyze the ways that the media use words and images to attract the public's attention (7th grade only) and how different people experience it (8th grade only)  6-8.RN.4.2, 6-8.RN.4.3, 6-8.ML.1, 6-8.ML.2.1, 6-8.ML.2.2
8. Delineate and evaluate the argument and specific claims in a text, including the validity of reasoning as well as the relevance and sufficiency of evidence.	~ WPS, identify supporting reasons  K.RN.2.1, K.RN.2.2, K.RN.4.1	~ Identify supporting reasons  1.RN.4.1	~ Describe how reasons support points ~ Identify how a nonfiction text can be structured to compare and contrast, to describe a procedure, and to explain cause and effect  2.RN.3.2, 2.RN.4.1	~ Describe connections between parts of a text  3.RN.4.2	~ Explain how reasons and evidence support points  4.RN.4.1, 4.SL.4.1, 4.SL.4.2	~ Explain how reasons and evidence support points ~ Identify supporting reasons and evidence  5.RN.4.1, 5.RN.4.2	~ Trace and evaluate argument and specific claims within a text ~ Assess if reasoning is sound and evidence relevant  6-8.RN.4.1
9. Analyze how two or more texts address similar themes or topics in order to build knowledge or to compare the approaches the authors take.	~ WPS, identify similarities and differences between two text texts  K.RN.4.2	~ Identify similarities and differences between two texts  1.RN.4.2	~ Compare and contrast key points in two texts  2.RN.4.2	~ Compare and contrast key points and details in two texts ~Distinguish between fact and opinion  3.RN.3.2, 3.RN.4.2	~ Integrate information from two texts to write or speak  4.RN.4.2	~ Integrate information from several texts to write or speak  5.RN.4.2	~ Analyze two or more texts using different arguments and/or evidence  6-8.RN.3.3, 6-8.RN.4.1, 6-8.RN.4.3
<b>Range of Reading and Level of Text Complexity</b> 10. Read and comprehend complex literary and informational texts independently and proficiently.	~ Engage in group reading activities  K.RL.1, K.RN.1	~ WPS, read in grade 1 complexity band  1.RL.1, 1.RN.1	~ Read and comprehend in grades 2–3 complexity band, WPS at high end  2.RL.1, 2.RN.1, 2.RF.1, 2.RV.3.1	~ Read and comprehend in grades 2–3 complexity band  3.RL.1, 3.RN.1, 3.RF.1	~ Read and comprehend in grades 4–5 complexity band, WPS at high end  4.RL.1, 4.RN.1, 4.RF.1	~ Read and comprehend in grades 4–5 complexity band  5.RL.1, 5.RN.1, 5.RF.1	~ Read and comprehend in grades 6–8 complexity band, WPS as needed in grades 6–7  6-8.RL.1, 6-8.RN.1



INDIANA 2014 STATE STANDARDS FOR ENGLISH LANGUAGE ARTS & LITERACY IN HISTORY/SOCIAL STUDIES, SCIENCE, AND TECHNICAL SUBJECTS

**Foundational Skills for K–5**

College and Career Readiness Anchor:	Kindergarten:	Grade 1:	Grade 2:	Grade 3:	Grade 4:	Grade 5:	Grade 6–8:
<b>Print Concepts</b> 1. Demonstrate understanding of the organization and basic features of print.	<ul style="list-style-type: none"> <li>~ Follow words from left to right, top to bottom, and page by page</li> <li>~ Recognize that spoken words are represented in written language by specific letter sequences</li> <li>~ Understand that words are separated by spaces in print</li> <li>~ Recognize and name all upper- and lowercase letters</li> </ul> <p>K.RF.1, K.RF.2.1, K.RF.2.2, K.RF.2.3, K.RF.2.4,</p>	<ul style="list-style-type: none"> <li>~ Develop an understanding of the five components of reading to build foundational skills</li> <li>~ Recognize the distinguishing features of a sentence</li> </ul> <p>1.RF.1, 1.RF.2.3</p>	<ul style="list-style-type: none"> <li>~ Demonstrate an understanding of the five components of reading to build foundational skills</li> </ul> <p>2.RF.1</p>	<ul style="list-style-type: none"> <li>~ Apply foundational reading skills to demonstrate reading fluency and comprehension</li> </ul> <p>3.RF.1</p>	<ul style="list-style-type: none"> <li>~ Apply foundational reading skills to demonstrate reading fluency and comprehension</li> </ul> <p>4.RF.1</p>	<ul style="list-style-type: none"> <li>~ Apply foundational reading skills to demonstrate reading fluency and comprehension</li> </ul> <p>5.RF.1</p>	~ Not applicable for 6-8
<b>Phonological Awareness</b> 2. Demonstrate understanding of spoken words, syllables, and sounds (phonemes).	<ul style="list-style-type: none"> <li>~ Recognize and produce rhyming words</li> <li>~ Count, produce, blend, and segment syllables</li> <li>~ Blend and segment onsets and rimes of single-syllable words</li> <li>~ Isolate and produce the initial, medial vowel, and final sounds</li> <li>~ Add or substitute sounds in simple words to make new words</li> </ul> <p>K.RF.3.1, K.RF.3.2, K.RF.3.3, K.RF.3.4, K.RF.3.5</p>	<ul style="list-style-type: none"> <li>~ Distinguish long from short vowel sounds</li> <li>~ Orally produce single-syllable words by blending sounds</li> <li>~ Add, delete, or substitute sounds to change single-syllable words</li> <li>~ Isolate and produce initial, medial vowel, and final sounds</li> <li>~ Segment spoken single-syllable words into their complete sequence of individual sounds</li> </ul> <p>1.RF.3.4, 1.RF.3.2, 1.RF.3.3, 1.RF.3.5, 1.RF.4.1,</p>	~ (Ends in grade 1)	~ (Ends in grade 1)	~ (Ends in grade 1)	~ (Ends in grade 1)	~ Not applicable for 6-8

Curriculum Alignment 8.23.15  
CK Alignment K-8

College and Career Readiness Anchor:	Kindergarten:	Grade 1:	Grade 2:	Grade 3:	Grade 4:	Grade 5:	Grade 6–8:
<b>Phonics and Word Recognition</b> 3. Know and apply grade-level phonics and word analysis skills in decoding words	~ Demonstrate basic knowledge of letter-sound correspondence ~ Distinguish between similarly spelled words by identifying the sounds of the letters that differ ~ Produce the primary or most frequent sounds for each consonant ~ Associate long and short sounds with common spellings for five major vowels ~ Read common high-frequency words by sight  K.RF.4.1, K.RF.4.2, K.RF.4.3, K.RF.4.4, K.RF.4.5	~ Know the spelling/ sound correspondences for common digraphs, and final vowel team conventions for long vowel sounds ~ Recognize and read grade appropriate irregular words ~ Decode regular one-syllable words, and two-syllable words using basic syllabic patterns. ~ Determine the number of syllables in a printed word ~ Read words with inflectional endings  1.RF.3.5, 1.RF.4.1, 1.RF.4.2, 1.RF.4.3, 1.RF.4.4, 1.RF.4.6	~ Distinguish long and short vowels when reading regular one-syllable words ~ Know spelling/sound correspondences for common vowel teams ~ Use knowledge of the six major syllable patterns to decode words ~ Decode regularly spelled two-syllable words with long vowels, and words with common prefixes and suffixes ~ Identify words with inconsistent but common spelling/sound correspondences ~ Recognize and read grade-appropriate irregular words  2.RF.4.2, 2.RF.4.3, 2.RF.4.4, 2.RF.4.5, 2.RF.4.6	~ Identify and know the meaning of the most common prefixes and derivational suffixes ~ Use knowledge of the six major syllable patterns to decode words ~ Decode words with common Latin suffixes, and multisyllabic words ~ Recognize and read grade appropriate irregular words  3.RF.1, 3.RF.4.2, 3.RF.4.4, 3.RF.4.5	~ Use combined knowledge of all letter-sound correspondences, syllabication patterns, and morphology to read accurately unfamiliar multisyllabic words in context and out of context  4.RF.4.2, 4.RF.4.6, 4.RV.2.2, 4.RV.2.4	~ Use combined knowledge of all letter-sound correspondences, syllabication patterns, and morphology to read accurately unfamiliar multisyllabic words in context and out of context  5.RF.4.6, 5.RN.2.1, 5.RV.2.2, 5.RV.2.4	~ Not applicable for 6-8
<b>Fluency</b> 4. Read with sufficient accuracy and fluency to support comprehension.	~ Read emergent reader texts with purpose and understanding  K.RL.1, K.RF.5	~ Read on-level text with purpose and understanding ~ Read on-level text orally with accuracy, appropriate rate, and expression on successive readings ~ Use context to confirm or self correct word recognition and understanding ~ Reread as necessary  1.RL.1, 1.RF.5	~ Read on-level text with purpose and understanding ~ Read on-level text orally with accuracy, appropriate rate, and expression on successive readings ~ Reread as necessary  2.RL.1, 2.RF.5, 2.RV.3.1	~ Read on-level text with purpose and understanding ~ Read on-level prose and poetry orally with accuracy, appropriate rate, and expression on successive readings ~ Read grade-appropriate words that have blends ~ Read multi-syllabic words composed of roots, prefixes and suffixes, irregular contractions, and possessives ~ Use context to confirm or self correct word recognition and understanding ~ Reread as necessary  3.RL.1, 3.RF.4.4, 3.RF.4.6, 3.RF.5	~ Read on-level text with purpose and understanding ~ Read on-level prose and poetry orally with accuracy, appropriate rate, and expression on successive readings ~ Use context to confirm or self correct word recognition and understanding ~ Reread as necessary  4.RL.1, 4.RF.5	~ Read on-level text with purpose and understanding ~ Read on-level prose and poetry orally with accuracy, appropriate rate, and expression on successive readings ~ Use context to confirm or self correct word recognition and understanding ~ Reread as necessary  5.RL.1, 5.RF.5	~ Not applicable for 6-8

INDIANA 2014 STATE STANDARDS FOR ENGLISH LANGUAGE ARTS & LITERACY IN HISTORY/SOCIAL STUDIES, SCIENCE, AND TECHNICAL SUBJECTS

**Writing Standards for K–8**

College and Career Readiness Anchor:	Kindergarten:	Grade 1:	Grade 2:	Grade 3:	Grade 4:	Grade 5:	Grade 6–8:
<b>Text Types and Purposes</b>							
1. Write arguments to support claims in an analysis of substantive topics or texts, using valid reasoning and relevant and sufficient evidence.	~ Write for specific purposes and audiences ~ Draw, dictate, and write opinion pieces  K.W.1, K.W.3.1	~ Write opinion pieces with reasons and basic structure  1.W.3.1	~ Write opinion pieces with an introduction, reasons—using linking words— and a conclusion  2.W.3.1	~ Write opinion pieces with an introduction, organizational structure, reasons, linking words, and a conclusion  3.W.1, 3.W.3.1	~ Write opinion pieces with an introduction, organizational structure, facts and details, linking words and phrases, and a conclusion  4.W.3.1	~ Write opinion pieces with an introduction, organizational structure, logically ordered reasons, linking words, phrases, and clauses, and a conclusion  5.W.3.1	~ Write arguments to support claims with reasons and relevant evidence, with an introduction, logical organization, supporting claims, linking words, phrases, and clauses, a formal style, and a conclusion  6-8.W.3.1
2. Write informative/ explanatory texts to examine and convey complex ideas and information clearly and accurately through the effective selection, organization, and analysis of content.	~ Write for specific purposes and audiences ~ Draw, dictate, and write informative/ explanatory texts  K.W.1, K.W.3.2	~ Write informative/explanatory texts with some facts and basic structure  1.W.3.2	~ Write informative/explanatory texts with an introduction, developed points, and a conclusion  2.W.3.2	~ Write informative/explanatory texts with an introduction, grouped related information, illustrations, facts and details, linking words, and a conclusion  3.W.3.2	~ Write informative/ explanatory texts with an introduction, organizational structure, formatting, illustrations, multimedia, details, facts, quotations, linking words and phrases, precise language, domain-specific vocabulary, and a conclusion  4.W.3.2	~ Write informative/ explanatory texts with an introduction, organizational structure, formatting, illustrations, multimedia, details, facts, quotations, linking words, phrases, and clauses, precise language, domain-specific vocabulary, and a conclusion  5.W.3.2	~ Write informative/ explanatory texts with an introduction, organizational structure, formatting, graphics, multimedia, details, facts, quotations, appropriate transitions, precise language, domain-specific vocabulary, a formal style, and a conclusion.  6-8.W.3.2
3. Write narratives to develop real or imagined experiences or events using effective technique, well chosen details, and well structured event sequences.	~ Write for specific purposes and audiences ~ Draw, dictate, and write to narrate a single event or loose series of events ~ Sequence and provide reactions  K.W.1, K.W.3.3	~ Write narratives using sequencing, details, temporal words, and a closing  1.W.3.3	~ Write narratives using sequencing, details, temporal words, and a closing  2.W.3.3	~ Write narratives of real or imagined events using details, natural sequencing, an introduction, developed experiences, temporal diction, and a conclusion  3.W.3.3	~ Write narratives of real or imagined events using details, natural sequencing, an introduction, developed experiences and responses, transitional and precise diction, and a conclusion  4.W.3.3	~ Write narratives of real or imagined events using details, natural sequencing, an introduction, developed experiences and responses, transitional and precise diction, and a conclusion  5.W.3.3	~ Write narratives of real or imagined events using details and natural sequencing, a clear context and point of view, an introduction, narrative techniques, transitional and precise diction, and a conclusion  6-8.W.3.3
<b>Production and Distribution of Writing</b>							
4. Produce clear and coherent writing in which the development, organization, and style are appropriate to the task, purpose, and audience.	~ Write for specific purposes and audiences  K.W.1	~ Write routinely over brief time frames and for a variety of purposes and audiences  1.W.1	~ Write routinely over brief time frames and for a variety of purposes and audiences  2.W.1	~ WPS, develop and organize writing  3.W.4	~ Develop and organize clear and coherent writing  4.W.4	~ Develop and organize clear and coherent writing  5.W.4	~ Produce clear and coherent writing appropriate for grade level (see Writing Standards 1–3)  6-8.W.4
5. Develop and strengthen writing as needed by planning, revising, editing, rewriting, or trying a new approach.	~ WPS, respond to questions and suggestions ~ WPS, add details to strengthen writing  K.W.4	~ WPS, respond to questions and suggestions ~ WPS, add details to strengthen writing on a topic  1.W.4	~ WPS, strengthen topical writing as needed by revising and editing  2.W.4	~ WPS, develop and strengthen writing by planning, revising, and editing  3.W.4	~ WPS, develop and strengthen writing by planning, revising, and editing  4.W.4	~ WPS, develop and strengthen writing by planning, revising, editing, or trying a new approach  5.W.4	~ WPS, develop and strengthen writing by planning, revising, editing, rewriting, or trying a new approach ~ Focus on task, purpose, and audience  6-8.W.4

Curriculum Alignment 8.23.15  
CK Alignment K-8

College and Career Readiness Anchor:	Kindergarten:	Grade 1:	Grade 2:	Grade 3:	Grade 4:	Grade 5:	Grade 6–8:
<b>Production and Distribution of Writing</b>							
<i>6 Use technology, including the internet, to produce and publish writing and to interact and collaborate with others</i>	~ WPS, collaboratively produce and publish writing using digital tools ~ Recognize various types of media ~ Recognize common signs and logos and identify commercials or advertisements  K.W.4, K.ML.1, K.ML.2.1	~ WPS, collaboratively produce and publish writing using digital tools ~ Recognize the role of media in informing, persuading, entertaining, and transmitting culture. ~ Demonstrate understanding of media by asking and answering questions  1.W.4, 1.ML.1, 1.ML.2.1	~ WPS, collaboratively produce and publish writing using digital tools ~ Recognize the role of media in informing, persuading, entertaining, and transmitting culture. ~ Recognize that media can be used for different purposes  2.W.5, 2.SL.4.2, 2.ML.1, 2.ML.2.1	~ WPS, produce and publish writing, and collaborate with others using digital tools ~ Type one page in a single setting ~ Recognize the role of media in informing, persuading, entertaining, and transmitting culture. ~ Recognize that media can be used for different purposes  3.W.4, 3.ML.1, 3.ML.2.1	~ WPS, produce and publish writing, and collaborate with others using digital tools ~ Type one page in a single setting  4.W.4	~ WPS, produce and publish writing, and collaborate with others using digital tools ~ Type one page in a single setting  5.W.4	~ Use technology to produce and publish writing ~ Present the relationships between information and ideas effectively ~ Interact and collaborate with others  6-8.W.4
<i>7. Conduct short as well as more sustained research projects based on focused questions, demonstrating understanding of the subject under investigation.</i>	~ Collaborate on research and writing projects  K.W.5	~ Collaborate on research and writing projects  1.W.5	~ Collaborate on research and writing projects  2.W.5	~ Conduct short research projects  3.W.5	~ Conduct short research projects ~ Investigate different aspects of a topic  4.W.5	~ Conduct short research projects ~ Use several sources ~ Investigate different aspects of a topic  5.W.5	~ Conduct short research projects ~ Draw on several sources ~ Generate questions for further investigation  6-8.W.5
<i>8. Gather relevant information from multiple print and digital sources, assess the credibility and accuracy of each source, and integrate the information while avoiding plagiarism.</i>	~ WPS, recall information to answer a question  K.W.5	~ WPS, recall information to answer a question  1.W.5	~ Recall information to answer a question  2.W.5	~ Recall and gather information to answer a question ~ Take brief notes ~ Assess source credibility ~ Sort evidence ~ Present information, choosing from a variety of formats  3.W.5	~ Recall and gather information ~ Take notes ~ Assess source credibility ~ List sources ~ Present information, choosing from a variety of formats  4.W.5	~ Recall and gather information ~ Take notes ~ Assess source credibility ~ Avoid plagiarism ~ List sources ~ Summarize ~ Present information, choosing from a variety of formats  5.W.5	~ Formulate research question ~ Gather relevant information ~ Follow standard citation format ~ Avoid plagiarism ~ Assess source credibility ~ Quote or paraphrase ~ Present information, choosing from a variety of formats  6-8.W.5
<b>Research to Build and Present Ideas</b>							
<i>9. Draw evidence from literary or informational texts to support analysis, reflection, and research.</i>	~ (Begins in grade 4)	~ (Begins in grade 4)	~ (Begins in grade 4)	~ (Begins in grade 4)	~ Draw evidence from literature and informational texts according to grade 4 reading standards  4.SL.3.1, 4.RL.4.2, 4.RN.4.2, 4.W.1, 4.W.3.2	~ Draw evidence from literature and informational texts according to grade 5 reading standards  5.RL.2.1, 5.RL.2.3, 5.RL.3.1, 5.RN.2.1, 5.RN.2.3, 5.RN.3.1, 5.W.1, 5.W.3.2	~ Draw evidence from literature and informational texts according to grades 6–8 reading standards  6-8.RL.2.1, 6-8.RL.3.2, 6-8.RN.2.1, 6-8.RN.2.3, 6-8.RN.3.3, 6-8.RN.4.1, 6-8.W.1, 6-8.W.3.1, 6-8.W.3.2, 6-8.W.5, 6-8.ML.2.1
<b>Range of Writing</b>							
<i>10. Write routinely over extended time frames (time for research, reflection, and revision) and shorter time frames (a single sitting or a day or two) for a range of tasks, purposes, and audiences.</i>	~ Write for specific purposes and audiences ~ Write by moving from left to right and top to bottom  K.W.1, K.W.2.2	~ Write routinely over brief time frames and for a variety of purposes and audiences  1.W.1	~ Write routinely over brief time frames and for a variety of purposes and audiences  2.W.1	~ Write routinely over long and short time frames  3.W.1	~ Write routinely over long and short time frames  4.W.1	~ Write routinely over long and short time frames  5.W.1	~ Write routinely over long and short time frames for a range of tasks, purposes, and audiences  6-8.W.1

INDIANA 2014 STATE STANDARDS FOR ENGLISH LANGUAGE ARTS & LITERACY IN HISTORY/SOCIAL STUDIES, SCIENCE, AND TECHNICAL SUBJECTS

**Speaking and Listening Standards for K-8**

College and Career Readiness Anchor:	Kindergarten:	Grade 1:	Grade 2:	Grade 3:	Grade 4:	Grade 5:	Grade 6-8:
<b>Comprehension and Collaboration</b>							
1. Prepare for and participate effectively in a range of conversations and collaborations with diverse partners, building on others' ideas and expressing their own clearly and persuasively.	~ Converse with partners about kindergarten topics and texts in small and large groups ~ Follow discussion rules ~ Converse with multiple exchanges  K.SL.1, K.SL.2.1, K.SL.2.3, K.SL.2.5	~ Converse with partners about grade 1 topics and texts in small and large groups. ~ Follow discussion rules ~ Respond to comments ~ Ask questions  1.SL.1, 1.SL.2.1, 1.SL.2.3, 1.SL.2.4, 1.SL.2.5	~ Converse with partners about grade 2 topics and texts in small and large groups. ~ Follow discussion rules ~ Ask for clarification and explanation  2.SL.1, 2.SL.2.1, 2.SL.2.3, 2.SL.2.4, 2.RV.3.2	~ Converse with partners about grade 3 topics and texts in small and large groups. ~ Come to discussions prepared ~ Follow discussion rules ~ Ask questions ~ Explain own point of view  3.SL.1, 3.SL.2.1, 3.SL.2.2,	~ Converse with partners about grade 4 topics and texts in small and large groups. ~ Come to discussions prepared ~ Follow discussion rule ~ Pose and respond to questions ~ Review key ideas ~ Explain own point of view ~ Paraphrase  4.SL.3.1, 4.SL.4.1	~ Converse with partners about grade 5 topics and texts in small and large groups. ~ Come to discussions prepared ~ Follow discussion rule ~ Pose and respond to questions ~ Elaborate on the remarks of others ~ Review key ideas ~ Draw conclusions ~ Summarize  5.RL.2.2, 5.RN.2.2, 5.SL.2.5, 5.SL.3.1, 5.SL.3.2	~ Converse with partners about grade 6-8 topics and texts, as appropriate, in small and large groups. ~ Come to discussions prepared ~ Refer to evidence discovered during preparation ~ Follow discussion rules ~ Pose and respond to detailed questions ~ Recognize new evidence and consider it in relation to one's own views ~ Interpret and analyze diverse media and formats <b>~ Analyze main ideas and supporting details presented in diverse media formats, and explain who the ideas clarify a topic, text, or issue under study</b>  6.SL.3.1, 7.SL.3.1
2. Integrate and evaluate information presented in diverse media and formats, including visually, quantitatively, and orally.	~ Confirm understanding by questioning  K.SL.3.1	~ Ask and answer questions about key details in literature and informational texts  1.RV.3.2, 1.SL.3.1, 1.SL.3.2	~ Recount key details ~ Use appropriate language  2.SL.3.1, 2.SL.3.2	~ Determine main ideas and details ~ Retell information  3.SL.2.5, 3.SL.3.1			
3. Evaluate a speaker's point of view, reasoning, and use of evidence and rhetoric.	~ Ask and answer questions for help, information, or clarity  K.SL.3.2	~ Ask and answer questions to gather information, or clarify  1.RV.3.2, 1.SL.2.4, 1.SL.3.2	~ Ask and answer questions to clarify, gather information, or understand  2.SL.2.4, 2.SL.3.2	~ Ask and answer questions with elaboration and detail  3.SL.2.4, 3.SL.3.2	~ Identify reasons and evidence for points  4.SL.2.4, 4.SL.2.5, 4.SL.3.2	~ Summarize points and supporting reasons and evidence  5.RL.2.2, 5.RN.2.2, 5.SL.2.5, 5.SL.3.1, 5.SL.3.2	~ Delineate arguments, claims, and evidence ~ Evaluate soundness of reasoning  6-8.SL.3.2
<b>Presentation of Knowledge and Ideas</b>							
4. Present information, findings, and supporting evidence such that listeners can follow the line of reasoning and the organization, development, and style are appropriate to task, purpose, and audience.	~ Describe familiar things ~ WPS, provide detail  K.SL.4.1	~ Clearly describe things with detail <b>~ Speak audibly using appropriate language</b>  1.SL.4.1	~ Tell a story with details ~ Speak audibly  2.SL.2.3, 2.SL.2.5, 2.SL.3.1, 2.SL.4.1	~ Report on a topic or tell a story with detail ~ Speak clearly  3.SL.4.1	~ Report on a topic or tell a story with detail ~ Support main ideas ~ Speak clearly  4.SL.4.1	~ Report on a topic or present an opinion ~ Sequence ideas logically ~ Use detail ~ Support main ideas ~ Speak clearly  5.SL.4.1	~ Present claims and findings ~ Emphasize salient points coherently ~ Use reasoning and detail ~ Use appropriate eye contact ~ Speak clearly and audibly  6-8.SL.4.1
5. Make strategic use of digital media and visual displays of data to express information and enhance understanding of presentations.	~ Add visuals to descriptions <b>~Recognize various types of media</b> <b>~Recognize common signs and logos and identify commercials or advertisements</b>  K.ML.1, K.ML.2.1, K.SL.3.1	~ Add visuals to descriptions to clarify <b>~ Recognize the role of the media in information, persuading, entertaining, or transmitting culture</b> <b>~ Demonstrate understanding of media by asking and answering questions about what is heard, read, or viewed</b>  1.SL.4.2, 1.ML.1, 1.ML.2.1	~ Create audio and visual displays to clarify <b>~Recognize the role of media in informing, persuading, entertaining, and transmitting culture.</b> <b>~Recognize that media can be used for different purposes</b>  2.SL.4.2, 2.ML.1, 2.ML.2.1	~ Create engaging audio and visual displays to emphasize details <b>~Recognize the role of media in informing, persuading, entertaining, and transmitting culture.</b> <b>~Recognize that media can be used for different purposes</b>  3.SL.4.2, 3.ML.1, 3.ML.2.1	~ Add audio and visual displays to enhance main ideas or themes <b>~ Identify how information found in electronic, print, and mass media is used to inform, persuade, entertain, and transmit culture</b> <b>~Recognize claims in print, image, and multimedia and identify evidence used to support these claims</b>  4.SL.4.2, 4.ML.1, 4.ML.2.1	~ Include multimedia and visual displays to enhance main ideas or themes <b>~Identify how information found in electronic print and mass media is used to inform, persuade, entertain, and transmit culture</b> <b>~ Review claims made in various types of media and evaluate evidence to support those claims</b> <b>~ Identify the role of the media in focusing people's attention on events and in forming their opinions on issues</b>  5.SL.4.2, 5.ML.1, 5.ML.2.1, 5.ML.2.2	~ Include multimedia and visual displays to clarify and strengthen claims and evidence <b>~Critically analyze information found in electronic, print, and mass media used to inform, persuade, entertain, and transmit culture</b> <b>~Use evidence to evaluate the accuracy of information and ways information is presented in multiple media messages</b> <b>~Identify target audience of a particular media message</b> <b>~ Analyze the ways that the media use words and images to attract the public's attention (7th grade only)</b>  6-8.SL.4.2, 6-8.ML.1, 6-8.ML.2.1, 6-8.ML.2.2

Curriculum Alignment 8.23.15

CK Alignment K-8

College and Career Readiness Anchor:	Kindergarten:	Grade 1:	Grade 2:	Grade 3:	Grade 4:	Grade 5:	Grade 6–8:
<b>Presentation of Knowledge and Ideas</b> 6. Adapt speech to a variety of contexts and communicative tasks, demonstrating command of formal English when indicated or appropriate.	~ Speak audibly (IGS) ~ Express thoughts clearly ~ Give, restate, and follow simple two-step directions  K.SL.1, K.SL.4.3	~ Produce complete sentences when appropriate ~ Give and follow three- and four-step directions  1.SL.4.3	~ Produce complete sentences to provide detail or to clarify ~ Give and follow multi-step directions  2.SL.4.1, 2.SL.4.2, 2.SL.4.3	~ Speak in complete sentences to provide detail or to clarify contexts for formal and informal speaking  3.SL.1, 3.SL.2.1	~ Differentiate between contexts for formal and informal speaking  4.SL.1	~ Adapt speech to grade 5 contexts (formal vs. informal)  5.SL.1	~ Adapt speech to grades 6–8 contexts (formal vs. informal)  6-8.SL.1

**Language Standards for K–8**

College and Career Readiness Anchor:	Kindergarten:	Grade 1:	Grade 2:	Grade 3:	Grade 4:	Grade 5:	Grade 6–8:
<b>Conventions of Standard English</b> 1. Demonstrate command of the conventions of standard English grammar and usage when writing or speaking.	<ul style="list-style-type: none"> <li>~ Print upper- and lowercase letters</li> <li>~ Use common words: nouns, verbs, question words, and prepositions</li> <li>~ Form regular plural nouns</li> <li>~ Collaborate to produce and expand complete sentences</li> </ul> <p>K.W.2.1, K.W.6.1, K.W.6.1(A-D)</p>	<ul style="list-style-type: none"> <li>~ Print upper- and lowercase letters</li> <li>~ <b>Learn and apply knowledge of alphabetical order</b></li> <li>~ Use common words: nouns, singular and plural nouns in basic sentences, pronouns, <b>adjectives (2GS)</b>, conjunctions, determiners, and <b>prepositions (4GS)</b></li> <li>~ Form and use verbs in past, present, and future</li> <li>~ <b>Produce and expand complete sentences, including declarative, interrogative, imperative, and exclamatory</b></li> </ul> <p>1.RF.2.4, 1.W.2.1, 1.W.6 (A,B,C,D,E)</p>	<ul style="list-style-type: none"> <li>~ Use collective nouns, adjectives and adverbs, and reflexive pronouns</li> <li>~ Form and use past tenses of irregular verbs</li> <li>~ Produce, expand, and rearrange complete simple, compound, declarative, interrogative, imperative, and exclamatory sentences</li> </ul> <p>2.W.6.1A-C, 2.W.6.2E</p>	<ul style="list-style-type: none"> <li>~ Explain function of nouns, verbs, pronouns, adjectives, and adverbs</li> <li>~ Use regular and irregular plural nouns, and abstract nouns.</li> <li>~ Form and use regular and irregular verbs, the simple, comparative and superlative adjectives and adverbs, and coordinating and subordinating conjunctions.</li> <li>~ Ensure subject-verb and pronoun antecedent agreement</li> <li>~ Produce simple, compound, and complex sentences</li> </ul> <p>3.W.6.1(A-C), 3.W.6.1E, 3.SL.1</p>	<ul style="list-style-type: none"> <li>~ Use relative pronouns, modal auxiliaries, and frequently confused words</li> <li>~ Form and use the progressive and prepositional phrases</li> <li>~ <b>Write sentences that use the progressive verb tenses and recognize inappropriate shifts in verb tense</b></li> <li>~ Use adjectives and adverbs</li> <li>~ Recognize and correct run-ons and fragments</li> <li>~ <b>Produce simple, compound, and complex sentences</b></li> </ul> <p>4.W.6.1(A,B,C,D,E), 4.SL.1</p>	<ul style="list-style-type: none"> <li>~ Explain function of grammar choice</li> <li>~ Form and use the perfect tense</li> <li>~ Use tense to convey time</li> <li>~ Recognize and correct inappropriate tense</li> <li>~ Use correlative conjunctions</li> <li>~ <b>Use prepositions</b></li> </ul> <p>5.W.6.1(A,B,C,D,E), 5.SL.1</p>	<ul style="list-style-type: none"> <li>~ Ensure pronouns are in proper case</li> <li>~ Use intensive pronouns</li> <li>~ Recognize variations from standard English in speaking and writing</li> <li>~ Identify strategies to improve expression</li> <li>~ Explain the function of phrases, clauses, and verbals</li> <li>~ Choose among sentence types to signify meaning</li> <li>~ Use semicolon appropriately</li> <li>~ Use commas, semicolon, parentheses, ellipses, and dash to set off elements in text</li> <li>~ Form and use verbs in active, passive, indicative, imperative, interrogative, conditional, and subjunctive</li> </ul> <p>6-8.W.6-8.1, 6-8.W.6-8.1(A-E), 6-8.SL.1</p>
2. Demonstrate command of the conventions of standard English capitalization, punctuation, and spelling when writing.	<ul style="list-style-type: none"> <li>~ Use initial sentence caps</li> <li>~ Capitalize I</li> <li>~ Recognize and name end punctuation</li> <li>~ Write letter(s) for most phonemes</li> <li>~ Spell simple words phonetically</li> </ul> <p>K.W.6.2 (A-C)</p>	<ul style="list-style-type: none"> <li>~ Capitalize dates and names of people</li> <li>~ Use end punctuation</li> <li>~ Use commas in dates and series</li> <li>~ Spell words with common, patterns, common, irregular words, and untaught words phonetically</li> </ul> <p>1.W.6.1A, 1.W.6.2(A-C)</p>	<ul style="list-style-type: none"> <li>~ Form letters correctly and space words and sentences properly</li> <li>~ Capitalize proper nouns</li> <li>~ Use commas in letters</li> <li>~ Use apostrophes to form contractions and in common possessives</li> <li>~ Generalize spelling patterns</li> </ul> <p>2.W.2.1, 2.W.6.2(A-C)</p>	<ul style="list-style-type: none"> <li>~ <b>Write legibly in cursive</b></li> <li>~ Capitalize title words</li> <li>~ Use commas in addresses, and commas and quotation marks in dialogue</li> <li>~ Use spelling patterns in writing, and conventional spelling for common words and suffixing</li> <li>~ Form and use possessives</li> <li>~ Consult reference materials</li> </ul> <p>3.W.2.1, 3.W.6.2(A-C), 3.RV.2.5</p>	<ul style="list-style-type: none"> <li>~ <b>Write legibly in cursive or print</b></li> <li>~ Use correct capitalization</li> <li>~ Use commas and quotation marks for speech and quotes, and commas in compound sentences</li> <li>~ Spell grade-appropriate words correctly</li> <li>~ Consult reference materials</li> </ul> <p>4.W.2.1, 4.W.6.2(A-D), 4.RV.2.5</p>	<ul style="list-style-type: none"> <li>~ Use correct capitalization</li> <li>~ Use punctuation in series</li> <li>~ Use commas to separate introductions, to set off yes and no, tag questions, and to indicate direct address</li> <li>~ Format titles correctly</li> <li>~ Spell grade-appropriate words correctly</li> <li>~ Consult reference materials</li> </ul> <p>5.W.6.1(A-E), 6.W.6.2(A-D)</p>	<ul style="list-style-type: none"> <li>~ Use punctuation correctly</li> <li>~ Use an ellipsis to indicate an omission</li> <li>~ Spell correctly</li> </ul> <p>6-8.W.6-8.2(A-C)</p>
<b>Knowledge of Language</b> 3. Apply knowledge of language to understand how language functions in different contexts, to make effective choices for meaning or style, and to comprehend more fully when reading or listening.	~ (Begins in grade 2)	~ (Begins in grade 2)	~ Compare formal and informal English  2.W.6.1	~ Choose words and phrases for effect ~ Recognize differences between conventional formal and informal English  3.RV.1, 3.SL.1, 3.SL.4.1, 3.W.4	~ Choose words and phrases for precision ~ Choose punctuation for effect ~ Differentiate contexts for formal and informal English  4.RV.1, 4.W.4, 4.W.6.1(A-E), 4.W.6.2(A-D)	~ Expand, combine, and reduce sentences for effect ~ Compare and contrast varieties of English in texts  5.RV.1, 5.W.4, 5.W.6.1(A-E), 5.W.6.2(A-D)	~ Vary sentence patterns ~ Maintain consistency in style and tone ~ Choose appropriate language ~ Use verbs to achieve effects  6-8.RV.1, 6-8.RV.2.5, 6-8.SL.1, 6-8.W.4, 6-8.W.6-8.1(A-E), 6-8.W.6-8.2(A-C)

Curriculum Alignment 8.23.15  
CK Alignment K-8

College and Career Readiness Anchor:	Kindergarten:	Grade 1:	Grade 2:	Grade 3:	Grade 4:	Grade 5:	Grade 6–8:
<b>Vocabulary Acquisition and Use</b> <i>4. Determine or clarify the meaning of unknown and multiple-meaning words and phrases by using context clues, analyzing meaningful word parts, and consulting general and specialized reference materials, as appropriate.</i>	~ Identify and apply new meanings for familiar words ~ Determine meaning by using common inflexions and affixes  K.RV.2.4, K.RV.1	~ Determine word meaning by using context or common affixes ~ Identify common root words  1.RF.4.5, 1.RF.4.6, 1.RV.2.4	~ Determine word meaning by using sentence context, known prefixes, known root words, and reference materials  2.RV.2.1, 2.RV.2.4, 2.RV.2.5	~ Determine word or phrase meaning by using sentence context, known affixes, known root words, and reference materials  3.RV.1, 3.RV.2.1, 3.RV.2.4, 3.RV.2.5, 3.RV.3.2	~ Determine word or phrase meaning by using context, Greek and Latin affixes and roots, and reference materials  4.RV.1, 4.RV.2.1, 4.RV.2.4, 4.RV.2.5, 4.RV.3.2	~ Determine meaning of words and phrases using context, common Greek and Latin affixes and roots, and reference materials  5.RV.2.1, 5.RV.2.4, 5.RV.2.5, 5.RV.3.2	~ Determine or clarify the meaning of words and phrases based on grades 6–8 reading and content, as appropriate, choosing from a variety of strategies.  6-8.RV.1, 6-8.RV.2.1, 6-8.RV.2.2, 6-8.RV.2.3, 6-8.RV.2.4, 6-8.RV.2.5
<i>5. Demonstrate understanding of figurative languages, word relationships, and nuances in word meanings.</i>	~ WPS, sort common objects into categories ~ WPS, relate common verbs and adjectives with their antonyms ~ WPS, identify connections between words and use ~ WPS, act out meanings of similar verbs  K.RV.1, K.RV.2.2	~ WPS, sort words into categories ~ WPS, define words by category ~ WPS, identify connections between words and use ~ WPS, define verbs and adjectives with similar meanings  1.RV.2.1, 1.RV.2.2	~ Identify connections between words and use ~ Distinguish differences in verbs and adjectives with similar meanings  2.RV.2.2	~ Distinguish literal and nonliteral meanings ~ Identify connections between words and use ~ Distinguish differences in states of mind and certainty words  3.RV.1, 3.RV.3.1, 3.RV.2.2	~ Explain simple similes and metaphors ~ Recognize and explain meaning of common idioms ~ Relate words to antonyms and synonyms  4.RV.2.2, 4.RV.3.1, 4.RV.3.2	~ Interpret figurative language ~ Recognize and explain meaning of common idioms ~ Use relationships between words to understand meaning  5.RV.2.1, 5.RV.2.2, 5.RV.2.4, 5.RV.3.1, 5.RV.3.3	~ Interpret figures of speech in context ~ Use the relationship between words to better understand them ~ Distinguish among the connotations of words with similar denotations  6-8.RV.2.2, 6-8.RV.2.3, 6-8.RV.3.1, 6-8.R.3.2, 6-8.RV.3.3
<i>6. Acquire and use accurately a range of general academic and domain-specific words and phrases sufficient for reading, writing, speaking, and listening at the college and career readiness level; demonstrate independence in gathering vocabulary knowledge when encountering an unknown term important to comprehension or expression.</i>	~ Use heard words and phrases  K.RV.1	~ Use heard words and phrases, and common conjunctions  1.RV.1	~ Use heard words and phrases, and descriptive adjectives and adverbs  2.SL.2.5	~ Acquire and use academic and domain-specific words ~ Use spatial and temporal words  3.RV.1, 3.RV.3.2	~ Acquire and use academic and domain-specific words ~ Use precise verbs and nouns  4.RV.1, 4.RV.3.2, 4.W.1, 4.W.4	~ Acquire and use academic and domain-specific words ~ Use contrast and relational words  5.RV.1, 5.RV.3.2, 5.W.1, 5.W.4	~ Acquire and use academic and domain-specific words ~ Gather knowledge when considering an important word  6-8.RV.1, 6-8.RV.2.5, 6-8.W.1, 6-8.W.4



## Core Knowledge K-5 Sequence

Kindergarten	Week	Core Knowledge Domain	ELA Standards	Social Studies	Science
	1	Intro/Procedures			
	2-4	Nursery Rhymes and Fables	RF,RL,RV,W,SL		
	5-7	The Five Senses	RF,RL,RN,RV,W,SL		(3) Life Science
	8-11	Stories	RF,RL,RV,W,SL		
	12-15	Plants	RF,RL,RN,RV,W,SL		(2) Earth Science, (3) Life Science
	16-17	Review			
	18-20	Farms	RF,RL,RN,RV,W,SL, ML	(1) History, (2) Civics and Government, (3) Geography, (4) Economy	(3) Life Science
	21-23	Native Americans	RF,RL,RN,RV,W,SL	(1) History, (2) Civics and Government, (3) Geography, (4) Economy	
	24-25	Kings and Queens	RF,RL,RN,RV,W,SL		
	26-27	Seasons and Weather	RF,RL,RN,RV,W,SL	(3) Geography	(1) Physical Science, (2) Earth Science
	28-29	Columbus and the Pilgrims	RF,RL,RN,RV,W,SL	(1) History, (2) Civics and Government, (3) Geography	
	30-31	Review			
	32-33	Colonial Towns and Townspeople	RF,RL,RN,RV,W,SL	(1) History, (2) Civics and Government, (3) Geography, (4) Economy	
	34-36	Taking Care of the Earth	RF,RL,RN,RV,W,SL, ML	(3) Geography, (4) Economy	(1) Physical Science, (2) Earth Science, (3) Life Science, (4) Science, Eng., Tech
37-39	Presidents and American Symbols	RF,RL,RN,RV,W,SL, ML	(1) History, (2) Civics and Government, (3) Geography, (4) Economy		
40	Review				

1st Grade	Week	Core Knowledge Domain	ELA Standards	Social Studies	Science
	1	Intro/Procedures			
	2-4	Fables and Stories	RF,RL,RV,W,SL		
	5-7	The Human Body	RF,RL,RN,RV,W,SL		(3) Life Science
	8-10	Different Lands, Similar Stories	RF,RL,RN,RV,W,SL, ML	(1) History, (2) Civics and Government, (3) Geography, (4) Economy	(2) Earth Science
	11-14	Early World Civilizations	RF,RL,RN,RV,W,SL	(1) History, (2) Civics and Government, (3) Geography	
	15-17	Early American Civilizations	RF,RL,RN,RV,W,SL	(1) History, (2) Civics and Government, (3) Geography, (4) Economy	
	18-20	Astronomy	RF,RL,RN,RV,W,SL		(2) Earth Science
	21-23	The History of the Earth	RF,RL,RN,RV,W,SL	(3) Geography	(2) Earth Science, (3) Life Science
	24-26	Animals and Habitats	RF,RL,RN,RV,W,SL, ML	(3) Geography	(2) Earth Science, (3) Life Science
	27-30	Fairy Tales	RF,RL,RV,W,SL		
	31-33	A New Nation	RF,RL,RN,RV,W,SL	(1) History, (2) Civics and Government, (3) Geography, (4) Economy	
	34-36	Frontier Explorers	RF,RL,RN,RV,W,SL	(1) History, (2) Civics and Government, (3) Geography	
	37	Mexico	RF,RL,RN,RV,W,SL, ML	(1) History, (2) Civics and Government, (3) Geography, (4) Economy	(2) Earth Science
	38	Matter	RF,RL,RN,RV,W,SL		(1) Physical Science, (4) Science, Eng., Tech
39	Electricity	RF,RL,RN,RV,W,SL		(1) Physical Science, (4) Science, Eng., Tech	
40	Review				

2nd Grade	Week	Core Knowledge Domain	ELA Standards	Social Studies	Science
	1	Intro/Procedures			
	2-4	Fairy Tales and Tall Tales	RF,RL,RV,W,SL		
	5-8	Early Asian Civilization	RF,RL,RN,RV,W,SL	(1) History, (3) Geography	
	9	Japan	RF,RL,RN,RV,W,SL, ML	(1) History, (2) Civics and Government, (3) Geography, (4) Economy	(2) Earth Science
	10-12	The Ancient Greek Civilizations	RF,RL,RN,RV,W,SL	(1) History, (3) Geography	
	13-15	Greek Myths	RF,RL,RN,RV,W,SL		
	16-18	The War of 1812	RF,RL,RN,RV,W,SL	(1) History, (2) Civics and Government, (3) Geography, (4) Economy	
	19-21	Cycles in Nature	RF,RL,RN,RV,W,SL		(3) Life Science
	22-24	Westward Expansion	RF,RL,RN,RV,W,SL	(1) History, (2) Civics and Government, (3) Geography, (4) Economy	(2) Earth Science
	25-27	Insects	RF,RL,RN,RV,W,SL		(3) Life Science

Curriculum Alignment 8.23.15 CK

Sequence K-8

28-30	The U.S. Civil War	RF,RL,RN,RV,W,SL, ML	(1) History, (2) Civics and Government, (3) Geography, (4) Economy	
31-33	The Human Body: Building Blocks and Nutrition	RF,RL,RN,RV,W,SL		(3) Life Science
34-36	Immigration	RF,RL,RN,RV,W,SL, ML	(1) History, (2) Civics and Government, (3) Geography, (4) Economy	
37-38	Fighting for a Cause	RF,RL,RN,RV,W,SL	(1) History, (2) Civics and Government, (3) Geography, (4) Economy	
39	Simple Machines	RF,RL,RN,RV,W,SL		(1) Physical Science, (4) Science, Eng., Tech
40	Magnetism	RF,RL,RN,RV,W,SL		(1) Physical Science, (4) Science, Eng., Tech

## Core Knowledge K-5 Sequence

	Week	Core Knowledge Domain	ELA Standards	Social Studies	Science
3rd Grade	1	Intro/Procedures			
	2-4	Classic Tales: The Wind in the Willows	RF,RL,RV,W,SL		
	5-7	Classification of Animals	RF,RL,RN,RV,W,SL		(3) Life Science
	8-10	The Human Body: Systems and Senses	RF,RL,RN,RV,W,SL, ML		(3) Life Science
	11-14	Ancient Roman Civilizations	RF,RL,RN,RV,W,SL	(1) History, (2) Civics and Government, (3) Geography	
	15-17	Light and Sound	RF,RL,RN,RV,W,SL		(1) Physical Science, (4) Science, Eng., Tech
	18-19	Review			
	20-21	The Viking Age	RF,RL,RN,RV,W,SL	(1) History, (3) Geography	
	22-25	Astronomy	RF,RL,RN,RV,W,SL, ML		(2) Earth Science
	26-27	Native Americans: Regions and Culture	RF,RL,RN,RV,W,SL, ML	(1) History, (2) Civics and Government, (3) Geography	
	28-30	Early Exploration of North America	RF,RL,RN,RV,W,SL	(1) History, (2) Civics and Government, (3) Geography	
	31-33	Colonial America	RF,RL,RN,RV,W,SL	(1) History, (2) Civics and Government, (3) Geography, (4) Economy	
	34-35	Ecology	RF,RL,RN,RV,W,SL, ML		(2) Earth Science
	36	Geography	RF,RL,RN,RV,W,SL, ML	(1) History, (3) Geography	(2) Earth Science
	37-38	Rivers of the World	RF,RL,RN,RV,W,SL		(2) Earth Science
	39-40	Review			

	Week	Core Knowledge Domain	ELA Standards	Social Studies	Science
4th Grade	1	Intro/Procedures	RF,RL,RN,RV,W,SL		
	2-7	Personal Narrative	RF,RV,W,SL		
	8-11	The Middle Ages	RF,RL,RN,RV,W,SL	(1) History, (3) Geography	
	12-14	Poetry	RF,RL,RN,RV,W,SL		
	15-18	The Islamic Empire	RF,RL,RN,RV,W,SL, ML	(1) History, (3) Geography	
	19-20	The Circulatory System	RF,RL,RN,RV,W,SL		(3) Life Science
	21-23	Eureka!	RF,RL,RN,RV,W,SL		(1) Physical Science, (4) Science, Eng., Tech
	24-26	Geology	RF,RL,RN,RV,W,SL	(3) Geography	(2) Earth Science
	27-30	The American Revolution	RF,RL,RN,RV,W,SL, ML	(1) History, (2) Civics and Government, (3) Geography, (4) Economy	
	31-34	Treasure Island	RF,RL,RN,RV,W,SL		
	35-36	Atoms	RF,RL,RN,RV,W,SL		(1) Physical Science
	37-38	Meteorology	RF,RL,RN,RV,W,SL, ML		(1) Physical Science, (2) Earth Science, (4) Science, Eng., Tech
	38-40	Review			

	Week	Core Knowledge Domain	ELA Standards	Social Studies	Science
5th Grade	1	Intro/Procedures			
	2-4	Personal Narrative	RF,RL,RV,W,SL, ML		
	5-7	Early American Civilizations	RF,RL,RN,RV,W,SL	(1) History, (2) Civics and Government, (3) Geography, (4) Economy	
	8-10	Poetry	RF,RL,RV,W,SL		
	11	Classifying	RF,RL,RN,RV,W,SL		(3) Life Science
	12-13	Cells and Plants	RF,RL,RN,RV,W,SL		(2) Earth Science, (3) Life Science
	14-16	Contemporary Poetry	RF,RL,RN,RV,W,SL		
	17-20	Don Quixote	RF,RL,RN,RV,W,SL		
	21-24	Life Cycles and the Human Body	RF,RL,RN,RV,W,SL, ML		(3) Life Science
	25-27	The Renaissance	RF,RL,RN,RV,W,SL	(1) History, (2) Civics and Government, (3) Geography, (4) Economy	
	28-30	The Reformation	RF,RL,RN,RV,W,SL	(1) History, (2) Civics and Government, (3) Geography, (4) Economy	
	31-33	A Midsummer's Night's Dream	RF,RL,RV,W,SL		
	34-38	Native Americans	RF,RL,RN,RV,W,SL, ML	(1) History, (2) Civics and Government, (3) Geography, (4) Economy	
	39-40	Chemistry	RF,RL,RN,RV,W,SL		(1) Physical Science, (4) Science, Eng., Tech

## Middle School Sequence

6th Grade	Week	Main Standards Covered in ELA, SS, Science Domains	ELA Domains	Social Studies Domains and Standards	Science Domains and Standards
	Aug	ELA: RF, RL, RN, RV, W, SL, ML	Intro/Procedures, Short Stories	Deserts of the World (3) Geography	Deserts (2) Earth Science
	Sept	ELA: RF, RL, RN, RV, W, SL, ML	Short Stories	World Religions (Judaism and Christianity) (1) History, (3) Geography	Scientific Method (1) Physical Science, (4) Science, Eng., Tech
	Oct	ELA: RF, RL, RN, RV, W, SL, ML	<i>Iliad</i>	Ancient Civilizations (Greece and Rome), The Enlightenment (1) History, (3) Geography	Plate Tectonics (2) Earth Science
	Nov	ELA: RF, RL, RN, RV, W, SL, ML	<i>Odyssey, Julius Caesar</i>	The Revolutionary War (1) History, (2) Civics and Government, (3) Geography, (4) Economy	Oceans of the World (2) Earth Science, (3) Life Science
	Dec	ELA: RF, RL, RN, RV, W, SL, ML	<i>Julius Caesar</i>	French Revolution, Romanticism (1) History, (2) Civics and Government, (3) Geography, (4) Economy	Energy, Forms/Sources/Heat and Temperature (1) Physical Science, (4) Science, Eng., Tech
	Jan	ELA: RF, RL, RN, RV, W, SL, ML	Research	Latin American Independence, Industrialism, Capitalism (1) History, (2) Civics and Government, (3) Geography, (4) Economy	Heat and Energy Transfer, Atomic Structure (1) Physical Science, (4) Science, Eng., Tech
	Feb	ELA: RF, RL, RN, RV, W, SL, ML	Myths and Figures of Speech	Socialism, Civil War (1) History, (2) Civics and Government, (3) Geography, (4) Economy	Atomic Structure, Biographies (1) Physical Science, (4) Science, Eng., Tech
	Mar	ELA: RF, RL, RN, RV, W, SL, ML	<i>Prince and the Pauper Poetry</i>	Immigration, Industrialization (1) History, (2) Civics and Government, (3) Geography, (4) Economy	Physics (1) Physical Science, (4) Science, Eng., Tech
	Apr	ELA: RF, RL, RN, RV, W, SL, ML	Technical Writing	Reform in Industrial America (1) History, (2) Civics and Government, (4) Economy	Electromagnetic Radiation and Light (1) Physical Science, (4) Science, Eng., Tech
May/June	ELA: RF, RL, RN, RV, W, SL, ML	Persuasive Writing	Economics and Government (1) History, (2) Civics and Government, (3) Geography, (4) Economy	Sound Waves, Astronomy (1) Physical Science, (2) Earth Science, (4) Science, Eng., Tech	

7th Grade	Week	Main Standards Covered in ELA, SS, Science Domains	ELA Domains	Social Studies Domains and Standards	Science Domains and Standards
	Aug	ELA: RF, RL, RN, RV, W, SL, ML	Intro/Procedures, Short Stories	America Expansion, Spanish-American War (1) History, (2) Civics and Government, (3) Geography, (4) Economy	America (2) Earth Science
	Sept	ELA: RF, RL, RN, RV, W, SL, ML	Short Stories Elements of Fiction	America Expansion, Spanish-American War (1) History, (2) Civics and Government, (3) Geography, (4) Economy	Scientific Method (1) Physical Science, (4) Science, Eng., Tech
	Oct	ELA: RF, RL, RN, RV, W, SL, ML	Edgar Allen Poe	World War I (1) History, (2) Civics and Government, (3) Geography, (4) Economy	Atomic Structure (1) Physical Science, (4) Science, Eng., Tech
	Nov	ELA: RF, RL, RN, RV, W, SL, ML	Edgar Allen Poe	Russian Revolution (1) History, (2) Civics and Government, (3) Geography, (4) Economy	Chemical Reactions (1) Physical Science, (4) Science, Eng., Tech
	Dec	ELA: RF, RL, RN, RV, W, SL, ML	Cyrano de Bergerac	America in the 1920s (1) History, (2) Civics and Government, (3) Geography, (4) Economy	Chemical Reactions (1) Physical Science, (4) Science, Eng., Tech
	Jan	ELA: RF, RL, RN, RV, W, SL, ML	Literature <i>The Call of the Wild</i>	Great Depression FDR and the New Deal (1) History, (2) Civics and Government, (3) Geography, (4) Economy	Cells and Genetics (3) Life Science, (4) Science, Eng., Tech
	Feb	ELA: RF, RL, RN, RV, W, SL, ML	<i>Dr. Jekyll and Mr. Hyde</i> Research	Totalitarianism in Europe (1) History, (2) Civics and Government, (3) Geography, (4) Economy	Cells and Genetics History of the Earth (2) Earth Science, (3) Life Science, (4) Science, Eng., Tech
	Mar	ELA: RF, RL, RN, RV, W, SL, ML	Research WWII	Europe and America in WWII (1) History, (2) Civics and Government, (3) Geography, (4) Economy	History of the Earth (2) Earth Science, (3) Life Science
	Apr	ELA: RF, RL, RN, RV, W, SL, ML	<i>Diary of Anne Frank</i>	Pacific During WWII (1) History, (2) Civics and Government, (3) Geography, (4) Economy	Evolution Human Body (3) Life Science
May/June	ELA: RF, RL, RN, RV, W, SL, ML	Poetry	Conclusions of WWII Geography of America (1) History, (2) Civics and Government, (3) Geography, (4) Economy	Human Body Ecology (2) Earth Science, (3) Life Science, (4) Science, Eng., Tech	

## Middle School Sequence

Week	Main Standards Covered in ELA, SS, Science Domains	ELA Domains	Social Studies Domains and Standards	Science Domains and Standards
Aug	ELA: RF, RL, RN, RV, W, SL, ML	Intro/Procedures, Short Stories	Map Skills (3) Geography	Geography (2) Earth Science
Sept	ELA: RF, RL, RN, RV, W, SL, ML	Short Stories Elements of Fiction	Geography of Canada and Mexico (1) History, (3) Geography	Scientific Method Motion and Forces (1) Physical Science, (4) Science, Eng., Tech
Oct	ELA: RF, RL, RN, RV, W, SL, ML	Short Stories Elements of Fiction	The Middle East: Geography, Oil, and Politics (1) History, (2) Civics and Government, (3) Geography, (4) Economy	Motion and Forces Density and Buoyancy (1) Physical Science, (4) Science, Eng., Tech
Nov	ELA: RF, RL, RN, RV, W, SL, ML	<i>The Good Earth</i>	Decline of European Colonialism (1) History, (2) Civics and Government, (3) Geography, (4) Economy	Work, Energy, and Power Electromagnetic Radiation and Light (1) Physical Science, (4) Science, Eng., Tech
Dec	ELA: RF, RL, RN, RV, W, SL, ML	<i>Lord of the Flies</i>	The Vietnam War (1) History, (2) Civics and Government, (3) Geography, (4) Economy	Electromagnetic Radiation and Light (1) Physical Science, (4) Science, Eng., Tech
Jan	ELA: RF, RL, RN, RV, W, SL, ML	<i>Animal Farm</i>	The Civil Rights Movement (1) History, (2) Civics and Government, (3) Geography, (4) Economy	Sound (1) Physical Science, (4) Science, Eng., Tech
Feb	ELA: RF, RL, RN, RV, W, SL, ML	Argument/Counter Argument	End of the Cold War Apartheid and Modern Europe (1) History, (2) Civics and Government, (3) Geography, (4) Economy	Chemistry of Food and Respiration (1) Physical Science, (2) Life Science, (4) Science, Eng., Tech
Mar	ELA: RF, RL, RN, RV, W, SL, ML	Poetry	Breakup of the USSR (1) History, (2) Civics and Government, (3) Geography, (4) Economy	Weather (2) Earth Science, (4) Science, Eng., Tech
Apr	ELA: RF, RL, RN, RV, W, SL, ML	<i>Twelfth Night</i>	American Democracy (1) History, (2) Civics and Government, (3) Geography, (4) Economy	Electricity and Magnetism (1) Physical Science, (2) Earth Science, (4) Science, Eng., Tech
May/June	ELA: RF, RL, RN, RV, W, SL, ML	Autobiography/Memior	American Government (1) History, (2) Civics and Government (4) Economy	Electricity and Magnetism Rocks (1) Physical Science, (2) Earth Science, (4) Science, Eng., Tech

8th Grade

## Attachment 12

### Exit Standards

In order for a student to be promoted to High School, he/she must show a mastery of academic standards for 8th graders as adopted by the Indiana Board of Education and proficiency in the Grade 8 Core Knowledge Curriculum as included in Attachment 11. This will be demonstrated by:

1. Attaining a passing grade in math and English/Language Arts courses. The school will adopt the following grade scale: A+ (97-100), A (94-96), A- (90-93), B+ (87-89), B (84-86), B- (80-83), C+ (77-79), C (74-76), C- (70-73), F (below 70). The student will meet all state mandated performance criteria for promotion from 8th grade.
2. If a student's end of course grade is less than a "C-", a student must demonstrate proficiency in the following in order to be promoted to High School.
  - A. Reading – NWEA RIT score on the end of year NWEA test must be 220 or higher
  - B. Language Arts – NWEA RIT score on the end of year NWEA test must be 219 or higher
  - C. Mathematics – NWEA RIT score on the end of year NWEA test must be 230 or higher

In the event that a student does not meet the above standards, a remediation plan will be put into place where the student will receive targeted intervention and have an opportunity to demonstrate mastery during the summer. Our goal is to have all students prepared and ready for a successful high school career.

If the student does not meet any of the criteria listed above, the student may be retained in grade 8.

## Attachment 13

### School Calendar 2017/2018

Monday July 24th	First day of pre-service for teachers
Monday August 7th	First day for students
Monday September 4th	No School Students and Staff (Labor Day)
Tuesday September 5th	No School Students (Staff In-Service)
October 9th-October 20th	No School Students (Fall Break)
Monday October 23th	No School Students (Staff In-Service)
Wednesday November 8th	Half Day for Students (Staff In-Service)
November 22th-24th	No School (Thanksgiving Break)
December 21st	Last day of 1st Semester
Friday December 22th	No School (Winter Break Begins)
December 25th-January 5th	No School (Winter Break)
January 8th	First Day of 2nd Semester
Monday January 15th	No School Students and Staff
Tuesday January 16th	No School Students (Staff In-Service)
Wednesday February 7th	Half Day Students (Staff In-Service)
Monday February 19th	No School Students and Staff
Wednesday March 7th	Half Day Students (Staff In-Service)

Monday March 19th-  
Friday March 30th

No School (Spring Break)

Wednesday April 18th

Half Day Students (Staff In-Service)

Friday May 25th

No School Students and Staff

Monday May 28th

No School Students and Staff

Friday June 15th

Last Day of School



<b>Summary of Days</b>			
<b>Students</b>		<b>Staff</b>	
		<b>Full PD Days</b>	<b>12</b>
		<b>Student Days</b>	<b>81</b>
<b>Total First Semester</b>	<b>81</b>	<b>Total First Semester</b>	<b>94</b>
		<b>Full PD Days</b>	<b>1</b>
		<b>Student Days</b>	<b>101</b>
<b>Total Second Semester</b>	<b>101</b>	<b>Total Second Semester</b>	<b>102</b>
<b>Total Instructional Days</b>	<b>182</b>	<b>Total Staff Days</b>	<b>195</b>

## Daily Schedule

Our doors will open for breakfast at 7:20. Our school day will run from 7:50-3:00 with a 40 minute break for lunch and recess/break. This constitutes 370 minutes of instruction a day. Our instructional day includes 45 minutes of enrichment in Art, Music or Physical Education every day. 180 minutes each day is devoted to literacy. 90 minutes of the instructional day is devoted to mathematics. There is also additional time of 75 minutes built into the daily schedule for small groups and remediation.

Components of the Day	Description	Duration
Before School Activities	School Director will greet students as they arrive at school. Staff will be monitoring students as they arrive in the cafeteria for breakfast. Students will then either work on their drill and practice packets or they will move to the computer lab, if they are assigned to lab for that day.	30 Minutes (Duration of Arrival)
Morning Routine	School-wide Pledge of Allegiance and announcements are done. Teachers will go over the objectives of the day as well as other grade whole class activities such as calendar.	20 Minutes
Listening and Learning	The Listening and Learning Component of CKLA will be taught during this time.	60 Minutes
Break Time	Students will have a snack, use the restroom and refocus for the next block.	20 minutes
Skills	The Skills component of CKLA, this includes small groups and writing activities.	80 minutes
Lunch/Recess/Break		40 minutes

Specials Class	This time provides students with exposure to the Core Knowledge curriculum in Art and Music. Physical Education is also provided during this time	45 minutes
Math	Singapore math lessons will be taught with fidelity.	90 minutes
Center Rotations	These centers can be for Science and Social Studies content enrichment from Core Knowledge, technology integration, math and small group remediation of skills not mastered.	75 minutes

The school weekly calendar will be the same as the daily calendar. The only difference will be what Specials class a student will have in a given week. Students will have an A/B schedule where they will attend PE twice every week, but Music and Art will rotate where one week Music will be attended twice a week and Art once a week and then the opposite the next. This will allow students to be exposed to the Art and Music scope and sequence of the Core Knowledge curriculum six sessions a month each.

# 2017-2018

## School Year Calendar

July 17						
Su	M	Tu	W	Th	F	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

August 17						
Su	M	Tu	W	Th	F	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

September 17						
Su	M	Tu	W	Th	F	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

October 17						
Su	M	Tu	W	Th	F	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

November 17						
Su	M	Tu	W	Th	F	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

December 17						
Su	M	Tu	W	Th	F	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

January 18						
Su	M	Tu	W	Th	F	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

February 18						
Su	M	Tu	W	Th	F	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28			

March 18						
Su	M	Tu	W	Th	F	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

April 18						
Su	M	Tu	W	Th	F	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

May 18						
Su	M	Tu	W	Th	F	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

June 18						
Su	M	Tu	W	Th	F	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

July 18						
Su	M	Tu	W	Th	F	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

August 18						
Su	M	Tu	W	Th	F	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

- Pre-Service for Staff
- No School Students and Staff
- First Day/Last Day of Semester
- No School (Staff In-Service)
- Early Release Students

We will follow the IPS Flex Schedule if inclement weather requires the school to close and instructional days need to be made up.

Early Release Days dismiss students at 1:10

## **Attachment 14**

### **Enrollment Policies**

Rosa Parks: A Challenge Foundation Academy (“Rosa Parks:CFA”) is a public charter school. Rosa Parks:CFA admits students of any gender, race, color, religion, disability, national and ethnic origin, socio-economic status, or any other factor that may be considered unlawful, to all the rights, privileges, programs, and activities generally accorded or made available to students at the school. Rosa Parks:CFA shall enroll an eligible student who submits a timely application, unless the number of applications exceeds the capacity of a program, grade level, or building. In such cases, all applicants shall have an equal chance of being admitted through a random selection process. Applications will be made available online through our school website, at the school building and at community functions.

Prior to the School’s opening, an open enrollment period will be established. During the open enrollment period, all families interested in enrolling their child in the school will indicate interest by completing a form that will only include director information such as student name, date of birth, address, and phone number. At the end of the enrollment period, parents will be notified of admittance to the school or assigned a lottery number in the event that number of applications exceed capacity. If capacity is not reached after the established enrollment period, subsequent applications will be accepted in the order they are received.

At each phase of the admission process, the appropriate correspondence will be generated and communicated to each applicant. The data will be monitored and reports created to determine the need for a lottery, waitlists, and letters of admittance. If, at the end of the open enrollment period, there is an over capacity for any grade level, a lottery will be conducted (see Lottery Policy, below).

In subsequent years, applications and re-enrollment forms will be accepted each year during an open enrollment period and continuously to maintain capacity in each grade level. All currently enrolled students will be given priority and automatically enrolled the following school year, if their family indicates they intend to have their child reenroll in the school. All new applications will be date/time stamped as they are received and filed by grade level. If the number of applications exceeds the capacity of a program, grade level, or building, a public lottery will be held to determine which applicants are admitted. The number of seats available will be determined by the number of students who recommit minus the capacity. The drawing will continue until every name has been drawn and scheduled for enrollment, placed on a numerical waiting list, or placed back into the applicant pool. The lottery will be system generated. If an applicant is selected in the Lottery, the parent/guardian of the applicant will be offered a seat no later than five days after the date of the Lottery. If an accepted applicant decides not to attend the school, the slot will be given to the first person on the waiting list.

#### **Lottery Policy**

In accordance with public school law statutes, any child who is qualified under the laws of this state for admission to a public school is qualified for admission to charter schools. Charter schools shall not discriminate against any student on the basis of ethnicity, national origin, gender, or disability. Also, the School shall not limit admission to students on the basis of intellectual ability, measures of achievement or aptitude, athletic ability, disability, race, creed, gender, national origin, religion or ancestry, or any other factor that may be considered unlawful.

#### **Open Enrollment Period**

while a student is at school in any school building and on any school premises, attending school-sponsored activities, on or about any school-owned or operated vehicle, off school property at any school-sponsored or school approved activity or function or during any period of time when students are subject to the authority of school personnel and at any time when the student's behavior has a direct and immediate effect on maintaining order and discipline and protecting safety and welfare of students and staff.

*\*Note: at the discretion of the School Director other interventions may be assigned as deemed appropriate, including: referral to school counselor, detention, meeting of school personnel and/or other professionals, restricted activities, denial of school activities and extra-curricular events, behavior essays, referral to substance abuse programs, referral to mental health programs/evaluations/testing, referrals to other professionals, and involvement with outside agencies. Please note that this list is not all-inclusive but only a sample of possible interventions.*

#### **Legal Disclaimer**

Nothing in this policy is intended to contradict local, state, or federal laws or binding directives from the Indiana Charter School Board. In the event that any item in this policy does conflict with a local, state, or federal law, or binding directive of the Indiana Charter School Board, the respective law or directive supersedes the policy item.

The Board of Director of Rosa Parks: A Challenge Foundation Academy, Inc. reserves the right to amend the Student Code of Conduct at any time during the school year as a result of an independent review, occurrence of a situation not covered under this policy, or recommendation by a school representative, parent, or other stakeholder. The Student Code of Conduct may only be amended with a majority vote of the Board of Directors during a time which the Board is conducting regular school business. In the event the Student Code of Conduct is amended during the school year, parents/guardians and students will be promptly notified.

Applications for enrollment will be accepted during the months of January and February. All applications received during January and February will have equal priority for the lottery which will be held in March.

After February 24th, all applications will be dated and time stamped by computer submission and will be added to the waiting list in the order received. These applicants will be used to fill available vacancies after the lottery list has been depleted.

### **Enrollment Priority**

The School may give enrollment priority to applicants who have siblings who are currently enrolled at the school. The term siblings include any of the following who reside in the same household: half siblings, stepsiblings, and children residing in a family foster home.

### **Lottery Procedures for Sibling Applicants**

- a. If multiple birth siblings apply for admission to the School and a lottery is needed, the School shall enter one surname in the lottery to represent all of the multiple birth siblings applying at the same time. If that surname is selected, all multiple birth siblings shall be admitted.
- b. If siblings apply for admission who do not already have a sibling attending the School, all siblings will be entered as one surname in the lowest grade level that is being applied. If the surname of the siblings is selected, then all of the siblings shall be admitted to the extent that space is available and does not exceed the grade level capacity.

### **Lottery Conduct**

The conduct of the lottery shall be open to the public. Public notice will be sent to all concerned parties at least one week in advance. Additionally, members of the Rosa Parks:CFA board will be present, if possible. Members of the Indiana Charter School Board will also be notified of the lottery and invited to attend. The lottery will be monitored by a non-biased third party.

### **Rules: General**

1. For the purposes of the following rules, the following terms are defined as follows:
  - a. All references to dates are defined to mean the CLOSE OF BUSINESS on the date indicated.
  - b. Lottery refers to the selection of applicant names by a random method such as a system generated process or the blind drawing of individual names from a container in sequence until all names in the container have been exhausted.
  - c. Lottery refers to the process whereby all eligible applicants are assigned a random number by the student information system and sorted, by grade, in order of the randomly assigned number.
2. Only applications received prior to the end of the enrollment deadline are eligible to participate in the initial lottery.
3. All applicants offered a seat shall be required to respond to the offer within 1 week (7 days), starting from the date that the offer was made.

4. A lottery shall be conducted by a school to include all grades in which the number of applicants exceeds the number of expected seats available.

**Waiting List Policy**

A waiting list will be established using the lottery system whenever capacity is exceeded and the students on the list will be contacted if and when openings occur in the current school year only. The waiting list does not roll over to the following school year. A new application must be completed online during open enrollment each school year to be included in the lottery. Families who do not have online access will be invited to complete the application at the school.

**Notification of Acceptance Policy**

Parent/guardians will be notified of their child's acceptance or placement on a waiting list by an official letter from the School Director following the conclusion of the lottery.

**Acceptance of Seat Policy**

After notification of acceptance, a student registration packet must be completed and submitted prior to the due date set by administration, otherwise a seat will not be guaranteed for that student, and he/she will be placed at the end of the waiting list.

**Transfer Policy**

Transfer students follow public lottery procedures during open-enrollment or if applying after February 24th, will have to be placed on the waiting list until seats become available and until enrollment closes. If transfer students apply after school has begun and there are seats available, they will be admitted to the grade which they are assigned. If no seats are available, they will be placed on the waiting list for the grade to which they are assigned.

**Withdrawal**

Parents withdrawing their children must fill out a "Withdrawal Form" at the time of withdrawal. Student's permanent records will not be forwarded until the form is completed and a request for transcripts has been received from the student's new school.

**Re-Enrollment**

Students currently attending Rosa Parks:CFA will have the opportunity to re-enroll for the next school year by accurately completing and returning the required Student Re-Enrollment Form by the deadline provided. Students whose parents who fail to return an accurate Student Re-Enrollment Form by the posted deadline will not be guaranteed enrollment for the upcoming school year and will be required to participate in the new enrollment process with new students seeking admission to the school.



Enrollment Process  
2017-2018 School Year

To Apply: Rosa Parks:CFA is non-selective and open to all applicants. When there are more applicants to our school than available spots, we are required to conduct a lottery or random selection of students to be awarded seats in our school. We strongly encourage families to apply during our open enrollment period in order to have the best chance of being awarded a seat in our school. Open enrollment begins at 7:30 a.m. on January 9, 2017 and ends on February 24, 2017 @ 4:30 p.m. When open enrollment ends, applications are counted. If there are fewer applications than openings, all applications will be accepted. If there are more applications than openings, a lottery will be held.

Lottery: The lottery is a random selection to determine who will be accepted and who will be placed on a waiting list. It will be held at 6:00 p.m. on March 7, 2017 at Rose Parks:CFA. During the lottery, names will be randomly generated from our computer system. Preference is given for any available openings to siblings of students already enrolled. Parents will be notified by mail of the lottery results during the week of March 13, 2017. Applications received after open enrollment are accepted on a first-come, first-serve basis for any remaining openings or put on a waiting list.

If your child is on a Waiting List: You will be notified of acceptance by mail or phone if an opening becomes available for your child. Please make sure you notify Rosa Parks:CFA immediately if your contact information changes after you have turned in your application.

To Enroll: If your child has a spot in our school for the 2017-2018 school year, you are strongly encouraged attend a New Family Orientation. Orientation information will be sent out with your letter of acceptance. Parents must submit to the school all of the following items by the date specified in the letter: Official Release of Records Form, Admissions Form, and the most recent Immunization Records. If these are not received by that date, your child's enrollment may be delayed.

**IMPORTANT NOTES:**

- Your child is expected to be in attendance on the first day of school.
- Please notify the office if you do not intend to send your child to Rosa Parks:CFA.
- It is your responsibility to notify the school of address and/or phone number changes. If we are unable to reach you because of wrong address or phone – your child's name may be removed from our list.
- Each application is valid for one school year only. Students enrolled do not need to apply for future years.

Rosa Parks: A Challenge Foundation Academy is a public charter school. Rosa Parks:CFA admits students of any gender, race, color, religion, disability, national and ethnic origin, or any other factor considered unlawful to all the rights, privileges, programs, and activities generally accorded or made available to students at the school. It does not discriminate on the basis of gender, race, color, religion, disability, or national or ethnic origin, or any other factor considered unlawful, in administration of its educational policies, admissions policies, athletic, and other school-administered programs.

Rosa Parks: A Challenge Foundation Academy  
Application & Enrollment Calendar 2017-2018 School Year

January 9th	Enrollment Window Begins
January 9th	Begin Accepting Applications for School Year
January 30th	Rosa Parks-CFA Open House for Prospective Families (6PM)
February 24th	Application Deadline for New Students
March 7th	Lottery for New Applications (6PM)
March 13th	Letters sent to accepted applicants
April 3rd	Deadline for New Families to Register for New Family Orientation
April 15th	New Family Orientation Day
May 8th	Registration Packets Due for New Families

Enrolling Your Child: What Do You Do Once You've Secured a Spot at Rosa Parks:CFA?  
Attend New Family Orientation!

Parents and/or Guardians of new students need to attend a Rosa Parks:CFA Family Orientation. At that time, we will distribute the Rosa Parks:CFA Family Handbook and other critical information and introduce families to Rosa Parks:CFA mission, program, rules and expectations. If your child is admitted, you will receive registration information about the New Family Orientation in your child's acceptance letter. All New Family Orientations will be held on Saturday, April 16, 2016.

New Applicants to Rosa Parks:CFA must complete and return the following:

1. Initial Application by February 24th
2. Attend New Family Orientation April 15th
3. Registration Packets Due May 8th

Rosa Parks: A Challenge Foundation Academy is a tuition-free, public charter school open to all students, grade K-2. All students are welcome to apply. Please contact our office with any questions you may have.

**Rosa Parks: A Challenge Foundation Academy  
Student Code of Conduct**

**School Discipline Philosophy**

We, at Rosa Parks: A Challenge Foundation Academy (“RP:CFA”), believe that all children are valuable, have an innate curiosity, a willingness to learn, and that every child brings a unique gift to our school. We believe that in order for students to achieve at their maximum potential, it is the responsibility of the entire learning community to develop a safe and nurturing learning environment. All members of the school community are expected to work positively toward this goal and to respect the individuality and the rights of every person. Parent(s)/Guardian, students and school personnel are also expected to deal effectively with behavioral concerns.

The Student Code of Conduct is derived from successful practices of leading school discipline experts and is based on the following core beliefs:

- A school must ensure a safe, nurturing environment that inspires high academic achievement.
- A school must provide a socially, emotionally, and physically enriching environment.
- A school must be a community of individuals (teachers, school director, parents, board members and students) that support and respect each other.
- School staff must set an example of behavioral expectations for students to follow.
- School staff must demonstrate sensitivity to the social, emotional, and physical needs of students.
- Teachers have a responsibility to teach all students.
- Difficult student behavior should be seen as opportunities to educate students.
- Promoting student responsibility through positive reinforcement and encouragement leads to less discipline.
- Students must be taught to think globally and embrace the ideals of tolerance and fairness.
- Students must take ownership in creating a safe and nurturing learning environment by becoming active, positive participants in their school communities and the community as a whole.

**Student Behavior Expectations**

At all times, RP:CFA students are expected to follow its code of conduct. Students and school staff will work together to model positive behavior. Students are expected to:

- Be responsible for one’s own behavior.
- Conduct oneself in a manner which is conducive to learning and does not interfere with other student’s right to learn.
- Respect the personal, civil and property rights of all members of the school community.
- Refrain from the use of physical force, verbal abuse or harassment, or any illegal activities.
- Attend school and classes regularly, on-time, and be prepared with the necessary learning materials.
- Act in a manner consistent with the school’s expectations, regardless of time or place.
- Follow all school and classroom rules.

## **Student Discipline**

The school will take a firm but compassionate approach to student discipline. Classroom management is the first step towards student discipline. Teachers are empowered to work with their students and engage behavior management strategies and tactics. Numerous corrective techniques are used and may include consultation, verbal or nonverbal redirection, one-on-one discussions. Conferences are used as a second line of student discipline. Staff members may conduct a conference, by telephone or in person with parents and other staff members, or other parties as deemed necessary.

Although the school believes that discipline is a means to educate students, it also recognizes that certain behaviors and actions that jeopardize student and staff safety must be addressed quickly. The Board of Directors has set forth rules and expectations addressing student safety and security. Much like the rules that govern our cities, violations of these rules carry consequences.

The code of conduct for students attending RP:CFA is presented as rules and sanctions. Each rule is accompanied by the consequences (sanctions) for breaking that rule. These consequences are stated as minimum and maximum for each rule violation. Teachers, School Director, and other authorized personnel (including volunteers and bus drivers) are responsible for monitoring student conduct. Rule violations are to be reported via Electronic Discipline slips (referred to as E-Slips) to the School Director.

## **Suspension Procedure**

When the School Director determines that a scholar should be suspended out of school, the following process is initiated:

- a. Incident Review: A discussion between the School Director and staff member recommending suspension will be held prior to the suspension of any student. The parent/guardian will be notified prior to suspension, unless circumstances dictate a more immediate removal of the student from school premises.
- b. Parent Notification: The parent/guardian of the suspended student will be notified of the misconduct, length of suspension, and any other corrective actions taken.
- c. Intake Meeting: Upon returning to school from a suspension, the student will participate in an intake meeting with the Dean of Students. The student's parent/guardian may participate in the meeting. At this time, a behavior contract may be introduced.

## **Expulsion Procedure**

When the School Director determines that a student should be suspended, the following process is put in motion:

- a. Incident Review: The staff member recommending the suspension consults with the School Director, explaining the reason(s) for the recommendation. A determination is made to go forward with the recommendation or determine other consequences or course of action.
- b. Parent Incident Notification: The parent/guardian of the suspended student pending expulsion will be notified of the recommendation.

## **Due Process Procedure**

The following procedure is to be followed whenever a parent/guardian disagrees with an expulsion situation

- a. Parent Due Process Notification by Mail: Parents/guardians will receive through certified mail notice of the recommendation for expulsion and their recourse in the expulsion appeal process. The parents/guardians have 10 days upon receipt of this letter from the School Director to file for an appeal. The appeal will be overseen by an independent authority, typically an uninvolved staff member. Failure by the student's parent/guardian to request an appeal will be deemed a waiver of rights administratively to contest the expulsion.
- b. Notice of the appeal meeting being granted will be delivered in writing by certified mail or in person, and contain the reason(s) for the expulsion and the date, time, place, of the meeting.
- c. The committee overseeing the expulsion hearing will consist of: 3 RP:CFA teachers who will serve on a regular rotating basis.
- d. At the expulsion appeal hearing, Teachers or students involved in an incident cannot serve on the Discipline Committee that session and an alternate teacher or student will cover that seat. No teacher can hear a matter involving his or her child.
- e. The committee will hear the facts from the staff recommending the expulsion and the student or students involved and may ask questions of those at the hearing.
- f. The committee will vote anonymously on a ballot and place it in a ballot box to determine guilt or innocence. The majority vote will stand as the final decision on the matter.
- g. The committee's designated representative will make a written summary of the evidence heard at the meeting. The committee's decision will be sent by mail to the student's parent/guardian. This decision is final unless the parent/guardian wants to seek an appeal with the Marion County Juvenile Courts.

### **School Rules**

The following rules are to be followed at all times. Breaking these rules shall result in or out of school suspension for up to 10 days or recommendation for expulsion, depending on the severity of the offense and the student's discipline history. A serious violation of this policy may result in long-term suspension, or in the case of repeated violations and provided the student and parent(s) have been notified of this possibility, expulsion. RP:CFA takes a Zero Tolerance stance on any action or behavior that could be potentially hazardous, dangerous, or harmful to any individual or property on or off school premises. Behaviors that could be potentially hazardous, dangerous, or harmful to and individual or property on or off school premises shall result in the immediate removal from school grounds and involvement with local law enforcement, as appropriate.

#### **Rule 1. Inappropriate Interpersonal Behavior**

Students shall conduct their personal and social relationships according to acceptable community standards. Inappropriate or otherwise harassing behavior will not be tolerated.

#### **Rule 2. Noncompliance with Directives from Directors, Teachers and Other School Personnel**

Students shall comply with the directions of all managing directors, assistant managing directors, teachers, substitute teachers, counselors, media specialists, teacher assistants, student teachers, coaches, advisors, bus drivers, bus supervisors and any other authorized school personnel at all times while a student is at school in any school building and on any school premises, attending school-sponsored activities, on or about any school-owned or operated vehicle, off school property at any

school-sponsored or school approved activity or function or during any period of time when students are subject to the authority of school personnel and at any time when the student's behavior has a direct and immediate effect on maintaining order and discipline and protecting the safety and welfare of students and staff.

### Rule 3. Use of Tobacco Products

Students shall not use or possess tobacco products on any school property at any time while a student is at school in any school building and on any school premises, attending school-sponsored activities, on or about any school-owned or operated vehicle, off school property at any school-sponsored or school approved activity or function or during any period of time when students are subject to the authority of school personnel and at any time when the student's behavior has a direct and immediate effect on maintaining order and discipline and protecting the safety and welfare of students and staff.

### Rule 4. Forgery or Plagiarism

Students shall not provide false information to school officials and or parents or guardians with regard to any report card, attendance matter, grades or progress reports, discipline matters or any other school business. Students shall not take someone else's work or ideas and present them as their own.

### Rule 5. Unjustified Activation of a Fire or Other Alarm System

Students shall not activate any fire or other alarm system unless authorized to do so by school employees or unless there are reasonable grounds to believe that an actual emergency situation exists.

### Rule 6. Bullying or Harassment

As used in this policy, bullying or harassing behavior is any pattern of gestures or written, electronic, or verbal communications, or any physical act or any threatening communication that takes place on school property, at any school-sponsored function, and that:

- a. Places a student or school employee in actual and reasonable fear of harm to his or her person or damage to his or her property; or
- b. Creates or is certain to create a hostile environment by substantially interfering with or impairing a student's educational performance, opportunities, or benefits. A hostile environment means that the victim subjectively views the conduct as bullying or harassing behavior and the conduct is objectively severe or pervasive enough that a reasonable person would agree that it is bullying or harassing behavior.

Bullying may include insulting, abusive, harassing, profane, obscene, or seriously disrespectful words, acts of touching gestures, signs, verbal threats or other acts.

Students shall respect other students, visitors, school employees and other persons by utilizing appropriate language and behaviors at all times. No aggression towards oneself or others. Any action which is insulting, abusive, harassing, profane, obscene or seriously disrespectful and which disrupts the learning process for any student or which demeans or degrades another person is specifically prohibited.

### Rule 7. Disruption of School (Inciting or Participating in Student Disorder)

Students shall not lead or participate in any activity that has as its purpose the disruption of school business or which significantly affects the educational process. In the event that the disruption does not abate immediately or if the managing director deems it appropriate, law enforcement will be called.

#### Rule 8. Theft or Destruction of School or Personal Property

Students shall not steal or attempt to steal or knowingly be in possession of stolen property or intentionally damage or attempt to damage any school or private property while under school jurisdiction. Students shall not vandalize or damage or attempt to damage property belonging to others.

#### Rule 9. Fighting Among Students

Students shall not fight or attempt to cause bodily harm to another student through physical contact. If a student is attempting to involve another student in a fight, the other student should walk away and report it to a teacher, assistant managing director or managing director. If a student is a victim of a sudden unprovoked attack or fight, he or she may defend himself or herself only long enough to disengage from fighting to report it to an appropriate school official. Students who instigate fights will be subject to the same consequences as those who are actually involved in fighting.

#### Rule 10. Threats or Actions of Assault Against Adults

Students shall not cause or attempt to cause physical or bodily harm to managing directors, assistant managing directors, teachers, substitute teachers, student teachers, coaches, advisors, counselors, media specialists, bus drivers or monitors, or other adults at any time while a student is at school, in any school building and on any school premises, attending school-sponsored activities, on or about any school-owned or operated vehicle, off school property at any school-sponsored or school approved activity or function or during any period of time when students are subject to the authority of school personnel and at any time when the student's behavior has a direct and immediate effect on maintaining order and discipline and protecting safety and welfare of students and staff.

#### Rule 11. Violent Physical Assault Upon a Student

Students shall not cause, attempt to cause or verbally (written or oral) threaten to cause injury of any kind to a student while a student is at school in any school building and on any school premises, attending school-sponsored activities, on or about any school-owned or operated vehicle, off school property at any school-sponsored or school approved activity or function or during any period of time when students are subject to the authority of school personnel and at any time when the student's behavior has a direct and immediate effect on maintaining order and discipline and protecting safety and welfare of students and staff.

#### Rule 12. Possession of a Firearm

Students shall not possess or conceal or transport any gun, air gun, BB gun, pellet gun, firearm, or any weapon capable of firing a projectile of any kind or any gun facsimile or incidental items relating to firearms use, such as bullets, magazine clips, or other projectile items at any time while a student is at school in any school building and on any school premises, attending school-sponsored activities, on or about any school-owned or operated vehicle, off school property at any school-sponsored or school approved activity or function or during any period of time when students are subject to the authority of school personnel and at any time when the student's behavior has a direct and immediate effect on maintaining order and discipline and protecting safety and welfare of students and staff.

#### Rule 13. Possession of a Dangerous Weapon or Other Instrument

Students shall not possess or conceal or transport any weapon or other instrument that could cause or that is intended to cause bodily injury or other harm to another or misuse otherwise acceptable objects in a manner intended to cause harm to others at any time while a student is at school in any school building and on any school premises, attending school-sponsored activities, on or about any school-owned or operated vehicle, off school property at any school-sponsored or school approved activity or

function or during any period of time when students are subject to the authority of school personnel and at any time when the student's behavior has a direct and immediate effect on maintaining order and discipline and protecting safety and welfare of students and staff.

Rule 14. Possession, Use, Sale, Delivery or Distribution of Marijuana, Narcotics, Stimulants, Alcoholic Beverages, or any other Unauthorized or Illegal Substances or Drug Paraphernalia

Students shall not possess, use, sell, transmit, deliver, distribute marijuana, narcotics, stimulants, alcoholic beverages or any other controlled or unauthorized or illegal substances or drug paraphernalia at any time while a student is at school in any school building and on any school premises, attending school-sponsored activities, on or about any school-owned or operated vehicle, off school property at any school-sponsored or school approved activity or function or during any period of time when students are subject to the authority of school personnel and at any time when the student's behavior has a direct and immediate effect on maintaining order and discipline and protecting safety and welfare of students and staff. In all cases the substance will be confiscated and police will be notified.

Rule 15. Gangs and Gang Related Activities

No student shall commit any act that furthers gangs or gang-related activities, including the following:

- a. Wearing, possessing, using, distributing, displaying, or selling any clothing, jewelry, emblems, badges, symbols, signs, visible tattoos and body markings, or other items, or being in possession of literature that shows affiliation with a gang, or is evidence of membership or affiliation in any gang or that promotes gang affiliation;
- b. Communicating either verbally or non-verbally (gestures, handshakes, slogans, drawings, etc.), to convey membership affiliation in any gang or that promotes gang affiliation;
- c. Tagging, or otherwise defacing school or personal property with gang or gang-related symbols or slogans;
- d. Requiring payment of protection, money or insurance, or otherwise intimidating or threatening any person related to gang activity;
- e. Inciting other students to intimidate or to act with physical violence upon any other person related to gang activity;
- f. Soliciting others for gang membership;
- g. Conspiring to commit any violation of this policy or committing or conspiring to commit any other illegal act or other violation of school policies that relate to gang activity.

Before being suspended for a first offense of wearing gang-related attire (when not involved in any other kind of gang-related activity or behavior), a student may receive a warning and be allowed to immediately change or remove the attire if the school administration determines that the student did not intend the attire to show gang affiliation.

Rule 16. Arson or Making or Possessing Explosive or Incendiary Devices

Students shall not make or possess firecrackers, explosives, pyrotechnic, incendiary (capable of producing flame or fire) or smoke-creating devices or materials or facsimiles thereof. Students shall not set fire to anything unless directed to do so under the supervision of a teacher or administrator for educational purposes. In the event that a device is discovered, it shall be confiscated and not returned to the student.

Rule 17. Violations of Indiana Criminal Statutes

Students shall not violate any criminal statute or local ordinance or commit any act which could result in criminal prosecution or juvenile proceedings not previously covered elsewhere in these rules at any time



## Indianapolis Community Engagement Summary

July 16, 2015

10:00 – 11:00

Charles Ingram (Mayor's Office)

12:00 – 1:00

Jeff Bennett (IFF)

1:30 – 2:00

City Councilor Ben Hunter at Butler University

July 17, 2015

8:15-9:15

Michelle McKeown (ICSB)

10:00-11:00

Curt Merlau (ACE Prep Academy)

July 27, 2015

2PM

Melissa Drew and Tom Crouch (CAFE)

July 29, 2015

10 AM

Miriam Acevedo Davis (La Plaza)

August 12, 2015

10 AM

Dulce Vega (La Plaza)

August 19, 2015

4:00 PM

Tony Bennett

August 20, 2015

4:30 – 5:30

Seria Walton

6:00 – 7:00

Cliff Hackman

November 9, 2015

12:30 PM

Todd Relue

November 10, 2015

10 AM

Chad Addie

January 6, 2016

5:30 PM

Rosa Parks Prospective Board Members Dinner

January 26, 2016

2:00 PM

Jeff Lozer (INISchools)

3:00 PM

Brent Kent

January 29, 2016

2 PM

Betty Salgado

February 9, 2016

5 PM

Javier Barrera and Todd Relue

February 10, 2016

8 AM

Kim Reier and Jeff Lozer (INISchools)

February 12, 2016

11:30 AM

2:30

Drew Bloch

Brandon Brown (Mind Trust)

February 22, 2016

1:00 PM

3:00 PM

Kristin Hines (Indianapolis Mayor's Office)

ICSB staff (Amy and Bridget)

February 23, 2016

10 AM

6 PM

Charles Ingram (Mayor's Community Liaison)

Facilities Tour

March 11, 2016

Dear Rosa Parks:CFA Board of Directors,

TeamCFA is excited and committed to education in Indiana. Your school will change the lives of countless students in Indianapolis and be a point of hope on the Far Eastside.

In order to support your school even further, TeamCFA is committed to offering you a zero interest loan of \$110,000.00 in addition to the \$300,000 loan to grant funds we have previously committed to ensure the success of Rosa Parks:CFA.

Thank you for your dedication to educational choice.

Sincerely,

Tony Helton, Chief Operating Officer  
TeamCFA

8/25/2015

To Whom It May Concern:

I am a passionate advocate and representative of the eastside of Indianapolis asking you to support the application for a new charter school. I am currently the Mayor's Community Liaison, a business owner, vocal clergyman, and will serve as an advisory council member for the new school. I believe our community is in need of better school options and that granting this charter will contribute to an overall stronger eastside community.

I have helped run after-school programs at Team CFA's Indiana Academy of Excellence and look forward to new opportunities to support student achievement at a new school. Additionally, ahead of next school year I will assist Team CFA in their community engagement as an advisory council member, reaching out to other clergy, business leaders, and interested families. I believe Team CFA has the record of working in low-income communities required to operate a successful school on the far eastside, and I urge you to approve this new school.

Sincerely,

Charles Ingram



March 7, 2016

Chairman M. Karega Rausch  
Indiana Charter School Board  
143 West Market Street, Suite 300  
Indianapolis, IN 46204

Dear Chairman Rausch:

I am writing to express my strong support of the charter school applications for the Rosa Parks: A Challenge Foundation Academy and Dr. Elizabeth Blackwell: A Challenge Foundation Academy that the TeamCFA Foundation is submitting for your consideration.

The existing fifteen Team CFA schools in Indiana, Arizona, and North Carolina all use the *Core Knowledge® Sequence* as the foundation for a rigorous, academic curriculum. While over 1,500 schools across the country use the Core Knowledge approach, it has been my distinct pleasure to work closely with both the TeamCFA Foundation and each of its schools.

The Foundation provides not just the financial resources needed by new schools, but equally important, a solid grounding for each school in terms of exemplary academic, business, and governance practices. All Team CFA schools are held to the same standard of excellence, while each school and staff are simultaneously encouraged to recognize and embrace the unique benefits and challenges faced in their individual community.

The TeamCFA approach has proven highly successful for students, teachers and communities. I strongly recommend approval of the charter applications for the Rosa Parks: A Challenge Foundation Academy and Dr. Elizabeth Blackwell: A Challenge Foundation Academy. The Core Knowledge Foundation stands ready to support each of these schools in their implementation of Core Knowledge.

Sincerely,

Linda Bevilacqua  
President



**CHALLENGE FOUNDATION  
PROPERTIES**



March 10, 2016

Board of Directors  
Rosa Parks: A Challenge Foundation Academy, Inc.

RE: *Challenge Foundation Properties Support*

Dear Board of Directors:

This letter is to confirm that Challenge Foundation Properties of Oregon, Inc. ("CFP") has committed its support in the identification and potential acquisition of facilities for the new school to be operated by Rosa Parks: A Challenge Foundation Academy, Inc. ("Rosa Parks") in Indianapolis, Indiana. In accordance with CFP's programs, such support may include consulting services, lease negotiations, financing options for leased property renovations, or purchase and renovation of a building to be leased to Rosa Parks at an agreed upon rate.

We are excited to assist you with the new school and look forward to working with you.

Sincerely,

  
C. Philip Byers (Mar 10, 2016)

C. Philip Byers  
President  
Challenge Foundation Properties of Oregon, Inc.



**La Plaza, Inc.**  
8902 E. 38th Street  
Indianapolis, IN 46226  
t 317.890.3292  
f 317.898.4397  
[www.laplaza-indy.org](http://www.laplaza-indy.org)

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August 25, 2015

Dear Dr. Rausch,

La Plaza is pleased to support the application of TeamCFA's to open a charter school in the Far Eastside of Indianapolis. La Plaza is a non-profit organization that works to strengthen Central Indiana by advocating for and preparing Latino students for educational success and by connecting Latino families to health and social services.

TeamCFA's strong record serving in low-income and Latino students—and their interest in forming strong partnerships with community organizations like ours—would make them a valuable ally in the future of a vibrant Far East Side.

We hope you will support TeamCFA's application for the 2016 school year. Thank you.

Sincerely,

Miriam Acevedo Davis  
President & CEO



THE FRIEDMAN  
FOUNDATION  
FOR  
Educational  
Choice

Indiana Charter School Board  
Karega Rausch, Chair  
143 West Market St., Suite 300  
Indianapolis, IN 46204

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Dear Chairman Rausch and Board:

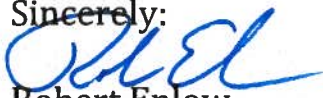
I am writing this letter in support of TeamCFA's application currently in front of the Indiana State Charter School Board to open new charter schools in 2016.

It has been my pleasure to know both John Bryan, founder of Challenge Foundation, and TeamCFA for many years. As a national foundation, we have worked with them closely in their efforts to provide quality education options for the children of Indiana, North Carolina and Arizona. In each instance, I have been thoroughly impressed by their dedication to rigor and quality.

Further, over the years, TeamCFA has insisted on a long-term commitment to the communities they serve. Their goal, and the goal of their founder, John Bryan, is to establish quality charter schools with rigorous curriculum while never losing sight of the importance of local community involvement.

For these reasons, I wholeheartedly recommend the TeamCFA application without hesitation or reservation. Please feel free to contact if you have questions or concerns that I might address.

Sincerely:



Robert Enlow  
President and CEO



Advancing Milton & Rose D. Friedman's vision of school choice for all children.

One American Square • Suite 2420 • Indianapolis, IN 46282  
317.681.0745 Telephone • 317.681.0945 Fax • [edchoice.org](http://edchoice.org)





Indiana Charter School Board  
Karega Rausch, Chair  
143 West Market Street  
Indianapolis, Indiana 46204

Dear Chairman Rausch and Board:

I am writing this letter in support of TeamCFA and its application to open charter schools in 2016. I have known John Bryan, founder of Challenge Foundation and TeamCFA for many years and have worked with him closely to provide quality education options for the children of Indiana. I further understand and applaud the vision of TeamCFA and their efforts in North Carolina and Arizona.

I was personally involved with the application process at IAE:CFA and served on the board for the first year of operations. That opportunity helped me gain additional knowledge and understanding of the TeamCFA philosophy.

TeamCFA fostered by John Bryan's vision help establish good quality schools while never forgetting the importance of local community involvement. I recommend the TeamCFA application without hesitation or reservation. Please feel free to contact me if you have questions or concerns that I might address.

Sincerely:

A handwritten signature in black ink that reads "Fred S. Klipsch".

Fred S. Klipsch  
Chairman



Indiana Charter School Board  
Karega Rausch, Chair  
143 West Market Street  
Indianapolis, Indiana 46204

August 27, 2015

Dear Chairman Rausch and Indiana Charter School Board Members:

The Institute of Quality Education (IQE) is a nonprofit organization working to achieve three goals: help more families exercise school choice so that each child is receiving their education in the learning environment which meets their individual need, assist schools of any type or model to continually improve so that fewer students are attending an underperforming school and create a network of concerned parents, educators, civic leaders and others who are interested in improving education in their own communities. As such, it is with great pleasure that I am writing to you today in support of the application submitted by TeamCFA for 2 charters, one to be located on the eastside of Indianapolis and the other in South Bend, Indiana.

TeamCFA has been a great member of the Indiana charter school community for a few years with its first school, the Indianapolis Academy of Excellence. Supported by the Challenge Foundation, Team CFA schools have the solid financial and operational infrastructure that is essential to all successful charter schools. Additionally, with their commitment to the Core Knowledge curriculum their students not only achieve at the highest levels academically but they grow into amazing individuals of strong character.

In every community across the state, there are Hoosiers who are passionate about giving children opportunities. By putting the needs of children above all else, local communities have the power to transform lives through quality educational options. IQE believes that TeamCFA, and specifically the two schools for which it is seeking charters, will be a tremendous assets to the Indianapolis and South Bend communities and will transform the lives of many young students in Indiana.

Thank you for your time and consideration of TeamCFA's charter application. Your support and approval of TeamCFA's request is sure to be a decision in which you will take great pride.

Respectfully,

A handwritten signature in black ink that reads "Betsy Wiley".

Betsy Wiley  
President

August 27, 2015

Chairman M. Karega Rausch  
Indiana Charter School Board  
143 West Market Street  
Indianapolis, IN 46204

Chairman Rausch:

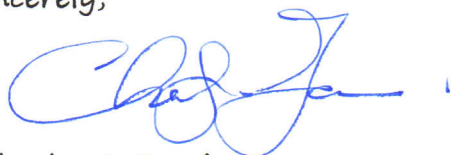
It is my pleasure to write a letter in support for Rosa Parks School: A Challenge Foundation Academy in Indianapolis, IN and Dr. Elizabeth Blackwell School: A Challenge Foundation Academy in South Bend, IN. The proposal is being submitted to the CHOICES Program by Team CFA.

My relationship with Team CFA has continued for over 10 years. I was one of the founding board members for the first Challenge Academy in 2005. I am currently the Chairman of the board for Avondale Meadows Academy (previously Challenge Academy) which continues to be one of the top performing K-5 charter schools in the State of Indiana. I also am the Chairman of the board for Vision Academy in Indianapolis and Vice Chair of Indianapolis Academy of Excellence ( a Team CFA school).

Team CFA has proven itself as one of the top Charter School organizations in the country. I have had the privilege to work with them and will continue to work with them to provide the best schools of Choice.

In conclusion, I fully support the efforts of the Team CFA schools listed above.

Sincerely,



Charles J. Garcia

President and CEO of C. Garcia and Associates LLC

## Attachment 17 Start-up Plan

Assigned to Key SB-School Board SD-School Director RD-Regional Director TCFA-TeamCFA support staff		
Month/Y ear	Task	Assigned to
May 2016	<b>Student Recruitment and Admissions/ Marketing/ Community Relations</b> <ul style="list-style-type: none"> <li>- Refine and finalize school message, and determine primary spokesperson</li> <li>- Finalize school emblem, marketing material drafts</li> <li>- Create and formalize school website with accurate contact information</li> <li>- Notify school community partners and develop a plan for inclusion of them in the marketing and student recruitment plan</li> <li>- Develop action plan and schedule for Student Recruitment</li> <li>- Join regional Charter Association</li> </ul>	SD, TCFA, SB, RD
	<b>Educational Program Development/ Teacher and Staff Recruitment</b> <ul style="list-style-type: none"> <li>- Finalize hiring for School Director position</li> </ul>	TCFA, SB
	<b>Financial/ Budget/ Grant Management/ Governance</b> <ul style="list-style-type: none"> <li>- identify federal, state and private grant opportunities <i>-ongoing</i></li> <li>- finalize financial management policies and internal controls</li> <li>- Create and finalize schedule for Board Meetings, public notice plan, board trainings and board manual for new member</li> </ul>	SD, TCFA, RD
	<b>Operations/ Facilities/ Equipment</b> <ul style="list-style-type: none"> <li>- Identify and develop plans regarding possible locations sites <i>-ongoing until January of 2017</i></li> <li>- Develop clear idea of who is responsible for facility acquisition and development</li> <li>- Plan budgets and financial source for facility improvement.</li> </ul>	TCFA, RD, SD, SB
June 2016	<b>Student Recruitment and Admissions/ Marketing/ Community Relations</b> <ul style="list-style-type: none"> <li>- Launch school websites, facebook and twitter pages</li> <li>- Order and have printed marketing materials for distribution</li> <li>- Create and formalize marketing strategy along with schedule for open houses, community forums, and direct mailings.</li> </ul>	TCFA, RD, SD

	<b>Educational Program Development/ Teacher and Staff Recruitment</b> <ul style="list-style-type: none"> <li>- School Leader begins TCFA Leadership Development Program</li> <li>- School leader attends trainings on Core Knowledge and Singapore Math Curriculum.</li> </ul>	TCFA, SD
	<b>Financial/ Budget/ Grant Management/ Governance</b> <ul style="list-style-type: none"> <li>- set up bank account and checkbook for the school</li> <li>- purchase and utilize money management software program</li> </ul>	SB, SD
	<b>Operations/ Facilities/ Equipment</b> <ul style="list-style-type: none"> <li>- continue with ongoing plans to identify and plan for possible location sites</li> </ul>	TCFA, RD, SD, SB
July 2016	<b>Student Recruitment and Admissions/ Marketing/ Community Relations</b> <ul style="list-style-type: none"> <li>- Meet with community partners and develop more to refine marketing plan including possible locations for community meetings <i>-ongoing throughout the year</i></li> <li>- School director will review existing TCFA marketing plans as well as local school marketing plans in order to refine the existing plan</li> </ul>	SD, TCFA RD
	<b>Educational Program Development/ Teacher and Staff Recruitment</b> <ul style="list-style-type: none"> <li>- Begin to detail administrative staff job descriptions and responsibilities, as well as potential start date and outline for recruitment and hiring dates <i>-ongoing until positions filled</i></li> <li>- school director works with TCFA placement school and Leadership Program development to develop plans and schedule for month leading up to school opening.</li> <li>- school director continues to work with the Core Knowledge and Singapore math materials to develop year at a glance and standards mapping documents <i>-ongoing for the remainder of the Leadership Development Program</i></li> <li>- school director is trained on and exposed to the extensive TCFA resources, support and trainings <i>-ongoing for the remainder of the Leadership Development Program</i></li> </ul>	SD, TCFA, SB
	<b>Financial/ Budget/ Grant Management/Governance</b> <ul style="list-style-type: none"> <li>- apply for identified federal, state and private grant opportunities <i>-ongoing for the rest of the year</i></li> </ul>	SD, TCFA,
	<b>Operations/ Facilities/ Equipment</b> <ul style="list-style-type: none"> <li>- continue with ongoing plans for finding location.</li> </ul>	SD, TCFA, RD
August 2016	<b>Student Recruitment and Admissions/ Marketing/ Community Relations</b> <ul style="list-style-type: none"> <li>- continue with ongoing contact with community partners and distribution of marketing materials</li> <li>- update website and facebook pages with additional information - <i>ongoing until the end of the year</i></li> </ul>	SD, RD

	<p><b>Educational Program Development/ Teacher and Staff Recruitment</b></p> <ul style="list-style-type: none"> <li>- School director receives training on Core Knowledge and Singapore Math curriculum implementation and development. <i>-ongoing for the remainder of the Leadership Development Program</i></li> <li>- School Director will receive training in the effective setup and use of Compass Learning and NWEA testing components, as well as student procedures for taking the test. <i>-ongoing for the remainder of the Leadership Development Program</i></li> </ul>	SD, TCFA,
	<p><b>Financial/ Budget/ Grant Management/Governance</b></p> <ul style="list-style-type: none"> <li>- School director begins training on school budget makeup, and components of a school budget</li> </ul>	SD, TCFA,
	<p><b>Operations/ Facilities/ Equipment</b></p> <ul style="list-style-type: none"> <li>- continue with ongoing development of possible location sites</li> </ul>	RD, SD, SB
September 2016	<p><b>Student Recruitment and Admissions/ Marketing/ Community Relations</b></p> <ul style="list-style-type: none"> <li>- School director and School Board will plan specific dates and information events both independent and in conjunction with other community events.</li> <li>- School director will refine marketing plan based on training and observation through the Leadership Development Program</li> <li>- School Director will continue to acquire and develop new and existing community partners <i>-ongoing throughout the year</i></li> <li>- School director will draft calendar for the initial school year including start dates, in service dates, breaks, and testing dates</li> </ul>	SD, TCFA, SB
	<p><b>Educational Program Development/ Teacher and Staff Recruitment</b></p> <ul style="list-style-type: none"> <li>- School director will receive training to support the population of the new school including; low ses populations, english language learners, high risk etc.</li> <li>- School director will begin training on identifying and serving special population students including Special education and relevant guidelines and laws <i>-ongoing throughout the year.</i></li> <li>- School Director will begin training on teacher evaluations, observations and coaching. <i>-ongoing throughout the year</i></li> </ul>	SD, TCFA,
	<p><b>Financial/ Budget/ Grant Management/Governance</b></p> <ul style="list-style-type: none"> <li>- School Director will receive training on Board and Governance, appropriate meeting laws, monthly reports, etc.</li> <li>- School director will begin to deliver monthly reports to the school board <i>-ongoing throughout the year</i></li> <li>- School director will develop draft of school budget including estimated amounts available in various line items based on projected enrollment.</li> </ul>	SD, TCFA, SB
	<p><b>Operations/ Facilities/ Equipment</b></p>	SD, TCFA,

	<ul style="list-style-type: none"> <li>- continue with ongoing development of possible location sites but refine plans by specific costs, available funds, and improvement costs based on location as well as projected enrollment</li> </ul>	SB,
October 2016	<b>Student Recruitment and Admissions/ Marketing/ Community Relations</b> <ul style="list-style-type: none"> <li>- School will hold at least one community informational event at a central location</li> <li>- Identify any potential parents ( if available) for volunteer in canvassing and marketing</li> <li>- School will develop timeline for marketing ground campaign ( door to door, at events, direct mailing, flyers, etc)</li> <li>- School director will formalize process for constant communication with potential students parents. Including email newsletters, phone numbers, etc.</li> <li>- School director will prepare draft of student and parent handbook</li> </ul>	SD, TCFA, RD
	<b>Educational Program Development/ Teacher and Staff Recruitment</b> <ul style="list-style-type: none"> <li>- School director will train in and use data developed from NWEA testing and other sources in the placement school to guide instruction and curriculum or instructional plans</li> <li>- School director with guidance of the school board will develop a draft of the employee handbook</li> </ul>	SD, TCFA, SB
	<b>Financial/ Budget/ Grant Management/Governance</b> <ul style="list-style-type: none"> <li>- School director will use the the school budget draft to develop budgets for different scenarios including; student count, facility issues, grant acceptance or rejection, transportation needed, staffing models, etc.</li> <li>- continue to explore and apply for grant opportunities</li> </ul>	SD, TCFA,
	<b>Operations/ Facilities/ Equipment</b> <ul style="list-style-type: none"> <li>- School director will identify potential vendors for school supplies, furniture, technology etc.</li> <li>- continue to develop plans regarding potential school sites.</li> </ul>	SD, TCFA
November 2016	<b>Student Recruitment and Admissions/ Marketing/ Community Relations</b> <ul style="list-style-type: none"> <li>- School will hold at least one information meeting or event to spread word of the school opening.</li> <li>- School will continue to meet with and recruit community partners</li> <li>- School will develop newsletter/ announcements and distribution policy and timeline for sending to partners and potential parents on a monthly basis <i>-distribution of the monthly short announcements will continue throughout the year.</i></li> </ul>	SD, TCFA, SB
	<b>Educational Program Development/ Teacher and Staff Recruitment</b> <ul style="list-style-type: none"> <li>- School director will develop a staffing model for the school based on projected student enrollment, as well as identify the various components of the staff that will best suit the student population</li> <li>- school director will identify the various components of staff training and development that will need to happen in pre-service</li> </ul>	SD, TCFA



	<ul style="list-style-type: none"> <li>- school director will develop interview questions, formalize job descriptions and develop a recruitment timeline for administrative team</li> </ul>	
	<p><b>Financial/ Budget/ Grant Management/Governance</b></p> <ul style="list-style-type: none"> <li>- School director will use budgets to explore staffing models</li> <li>- school will research and identify school payroll or human resource management operations systems to utilize (either subcontracted or internal systems)</li> <li>- School director will research and identify a financial management subcontractor (INIschools)</li> </ul>	SD, TCFA,
	<p><b>Operations/ Facilities/ Equipment</b></p> <ul style="list-style-type: none"> <li>- school will continue towards finalization of location and planning accordingly</li> </ul>	SD, TCFA, SB
December 2016	<p><b>Student Recruitment and Admissions/ Marketing/ Community Relations</b></p> <ul style="list-style-type: none"> <li>- School will send first announcement email to community partners, parents, and other stakeholders identifying dates for community events in Jan-March as well as identifying the date parents can begin to enroll. This should include location if that has been finalized.</li> <li>- School director will draft school enrollment packet and the forms that are needed and should be included in the packet.</li> <li>- identify uniform vendors for information in the enrollment packet</li> </ul>	SB, SD
	<p><b>Educational Program Development/ Teacher and Staff Recruitment</b></p> <ul style="list-style-type: none"> <li>- School leader will continue to train on staff hiring procedures including mock interviews, background checks, reference calls, and other procedures for that process.</li> <li>- School leader will work with contracted or internal human resources management system to develop and collect quotes for potential salary and benefits; retirement programs, health insurance programs, salary schedules, bonus systems etc.</li> <li>- School leader will refine work with teachers observations, data analysis, coaching, and curriculum and instructional development of the Core Knowledge and Singapore Math programs.</li> </ul>	SD, TCFA
	<p><b>Financial/ Budget/ Grant Management/Governance</b></p> <ul style="list-style-type: none"> <li>- School will contract with a financial management contractor (INIschools) and work with them to develop procedures and systems for purchases, cash, deposits, receipts, etc.</li> </ul>	SD,TCFA
	<p><b>Operations/ Facilities/ Equipment</b></p> <ul style="list-style-type: none"> <li>- Research and collect quotes for contracted services student services; food program, special student population services, janitorial, bussing etc. (based on budget and staffing model)</li> <li>- school will identify and research documentation needed when location is determined; zoning laws, occupancy forms;</li> </ul>	SD, RD

	traffic; city communication etc.	
January 2017	<b>Student Recruitment and Admissions/ Marketing/ Community Relations</b> <ul style="list-style-type: none"> <li>- School will hold at least one information session, including calendar marking open enrollment dates, lottery dates, uniform vendor</li> <li>- school will develop any press releases, or procedures for dealing with press including emergency contact information and point person for press contact.</li> <li>- school announcement for January is sent out</li> <li>- School enrollment packet is finalized, including school questionnaires, Free and Reduced Lunch Application, Home Language Survey, school calendar, uniform purchase form, etc. A short enrollment form may be developed but complete packet will distributed later and should be finalized.</li> <li>- School director will develop procedures and process for managing and maintaining student forms, and student information, as well as adding new students parents to information system (email and phone)</li> </ul>	SD, TCFA,
	<b>Educational Program Development/ Teacher and Staff Recruitment</b> <ul style="list-style-type: none"> <li>- School director will post for the administrative team positions identified, including Dean of Students, Social Worker, and Administrative Assistant.</li> <li>- School director will create a preliminary list of curriculum materials needed including Core Knowledge, Singapore Math, training materials and other resources to be included in the budget.</li> </ul>	SD, TCFA
	<b>Financial/ Budget/ Grant Management/Governance</b> <ul style="list-style-type: none"> <li>- School director will submit to the board a budget draft to include marketing funds, curriculum, salaries and staffing model, building information and improvements, grants etc.</li> </ul>	SD, SB
	<b>Operations/ Facilities/ Equipment</b> <ul style="list-style-type: none"> <li>- Ideally a building/ lease will be secured. The School director will work with the city to identify any paperwork, ensure submission of any zoning requirements and handle and lease paperwork.</li> <li>- School director will work to identify the needed improvements on the site and possible budget.</li> </ul>	SD, RD, SB, TCFA
February 2017	<b>Student Recruitment and Admissions/ Marketing/ Community Relations</b> <ul style="list-style-type: none"> <li>- Student enrollment opens</li> <li>- school will hold an open enrollment event to kick off open enrollment</li> <li>- date set for lottery draw if needed</li> <li>- website updated so show open enrollment and online enrollment form is available with instructions for submitting</li> <li>- school director will develop a facilities information form for parents to include the location, improvements to be made and timeline for available tours etc.</li> <li>- School director will finalize Student Parent Handbook and all it's components</li> </ul>	SD, TCFA,

	<p><b>Educational Program Development/ Teacher and Staff Recruitment</b></p> <ul style="list-style-type: none"> <li>- School director will begin to collect and evaluate job applications for Administrative team members. <i>-ongoing until April</i></li> <li>- School director will continue to work on professional development calendar draft, as well as job descriptions and staffing models</li> <li>- School will collect quotes for curriculum materials and other resources needed.</li> <li>- School will finalize employee handbooks including benefit information</li> <li>- School will finalize contract with special services providers for students and develop procedure for review of internal student applications with IEP's or other documentation</li> </ul>	SD, TCFA
	<p><b>Financial/ Budget/ Grant Management/Governance</b></p> <ul style="list-style-type: none"> <li>- school will select and contract for an independent auditor</li> <li>- finalized budget for improvements needed as well as furniture, fixtures, etc will be submitted to the board based on the chosen location</li> </ul>	SD, SB
	<p><b>Operations/ Facilities/ Equipment</b></p> <ul style="list-style-type: none"> <li>- School director will finalize "onboarding" procedures for hiring new staff, and create a "new hire" packet that will work with the contracted or internal human resources functions, including a complete check list.</li> <li>- school will formalize a list and cost of all furniture, fixtures, improvements etc needed for the new location (including signage)</li> <li>- School will contract for building technology systems, including phone system, software and hardware, copy machines, etc.</li> <li>- School will develop a draft of a complete safety and emergency plan and handbook based on the building acquired.</li> <li>- School will finalize contract with food service providers, janitorial services, bussing or any other contracted services.</li> </ul>	SD, TCFA,
March 2017	<p><b>Student Recruitment and Admissions/ Marketing/ Community Relations</b></p> <ul style="list-style-type: none"> <li>- School will host at least one community event to promote enrollment.</li> <li>- School will develop volunteer system for enrollment and recruitment of potential parents and community partners, including information packets, FAQ's and procedures.</li> <li>- send out monthly announcement/ newsletter</li> </ul>	SD
	<p><b>Educational Program Development/ Teacher and Staff Recruitment</b></p> <ul style="list-style-type: none"> <li>- School director will post for teaching, staff, and paraprofessional positions for the following school year</li> <li>- School director will finalize information packet for new hires, including salary and benefit information, as well as support systems available for recruitment</li> </ul>	SD, TCFA

	<ul style="list-style-type: none"> <li>- School director will attend or schedule to attend at least one job fair for teacher recruitment</li> <li>- School director may possibly be interviewing and hiring administrative team applicants.</li> </ul>	
	<p><b>Financial/ Budget/ Grant Management/Governance</b></p> <ul style="list-style-type: none"> <li>- school will continue to look at new grant opportunities and refine budget based on changing student enrollment projections.</li> </ul>	SD
	<p><b>Operations/ Facilities/ Equipment</b></p> <ul style="list-style-type: none"> <li>- will contract for necessary improvements on the building and build a timeline and budget for those improvements</li> <li>- school director will research and get quotes for student and teacher technology services, including chromebooks, teacher instructional tools, software, etc.</li> <li>- finalize school safety and emergency plan handbook and procedures.</li> <li>- contact local emergency services for a review of the emergency plan and suggestions on utilizing surrounding areas for safety evacuations.</li> </ul>	S, RD, TCFA
April 2017	<p><b>Student Recruitment and Admissions/ Marketing/ Community Relations</b></p> <ul style="list-style-type: none"> <li>- school will host at least one information event and continue enrollment</li> <li>- school will continue with the marketing plan to target areas with historical enrollment success</li> </ul>	SD
	<p><b>Educational Program Development/ Teacher and Staff Recruitment</b></p> <ul style="list-style-type: none"> <li>- School director will select interview, screen and process teachers and other staff members <i>-ongoing until all positions filled</i></li> <li>- finalize teacher observation, evaluation and procedures and forms</li> </ul>	SD, TCFA
	<p><b>Financial/ Budget/ Grant Management/Governance</b></p> <ul style="list-style-type: none"> <li>- final budget submitted to the board for approval to include contracted services, purchase building items, purchase of curricular items, staffing model and enrollment numbers</li> </ul>	SD, SB
	<p><b>Operations/ Facilities/ Equipment</b></p> <ul style="list-style-type: none"> <li>- continue to monitor improvements to the building for changes in schedule or budget</li> <li>- playground equipment and outdoor fixtures should be ordered and finalized</li> </ul>	SD
May 2017	<p><b>Student Recruitment and Admissions/ Marketing/ Community Relations</b></p> <ul style="list-style-type: none"> <li>- hold at least one family event targeting enrolled families and giving information about the building, (perhaps tour) and a finalized calendar of start dates, uniforms, curriculum, parent student handbook distributed</li> <li>- create letter of welcome for students and parents including the above information.</li> </ul>	SD, TCFA

	<p><b>Educational Program Development/ Teacher and Staff Recruitment</b></p> <ul style="list-style-type: none"> <li>- using enrollment numbers order curriculum and instructional resources needed for the rooms.</li> <li>- complete hiring of staff including administrative team and teachers</li> <li>- create letter of welcome for staff that has information about start dates, potential housing opportunities, professional development opportunities over the summer, and contact information</li> <li>- develop a bell schedule and daily schedule for students and teachers. As well as class schedule</li> <li>- identify any additional positions needed and post accordingly</li> </ul>	SD
	<p><b>Financial/ Budget/ Grant Management/Governance</b></p> <ul style="list-style-type: none"> <li>- continue to refine budget based on enrollment</li> <li>- schedule Board Governance training with TCFA</li> </ul>	SD
	<p><b>Operations/ Facilities/ Equipment</b></p> <ul style="list-style-type: none"> <li>- using enrollment numbers, complete the ordering of student and teacher technology both hardware and software</li> <li>- set up submission systems for student counts with IDOE</li> <li>- review and draft detailed procedures for student flow, parent drop off and pick up etc.</li> </ul>	SD
June 2017	<p><b>Student Recruitment and Admissions/ Marketing/ Community Relations</b></p> <ul style="list-style-type: none"> <li>- host information event in the building after set up.</li> <li>- send welcome packets to families enrolled</li> <li>- develop volunteer packet and procedures for parents wishing to volunteer in the classroom after school starts</li> <li>- ensure signage and other advertising is complete and accurate with any changes to information (i.e addresses and phone numbers, or location etc)</li> <li>- send out Student Records Requests for all students.</li> </ul>	SD
	<p><b>Educational Program Development/ Teacher and Staff Recruitment</b></p> <ul style="list-style-type: none"> <li>- develop detailed pre-service training plan, including topics of training, schedules for starting and ending, materials needed and scheduling trainers</li> </ul>	SD, TCFA
	<p><b>Financial/ Budget/ Grant Management/Governance</b></p> <ul style="list-style-type: none"> <li>- if not already done, submit final budget to Board for approval</li> </ul>	SD
	<p><b>Operations/ Facilities/ Equipment</b></p> <ul style="list-style-type: none"> <li>- open building, move in and manage the delivery of furniture, fixtures, technology, curriculum, resource materials etc.</li> <li>- manage the installation of building technology, intercom, phone system, copy machines, bell system etc.</li> </ul>	SD, RD, TCFA

	<ul style="list-style-type: none"> <li>- begin to input student information into Powerschool</li> </ul>	
July 2017	<p><b>Student Recruitment and Admissions/ Marketing/ Community Relations</b></p> <ul style="list-style-type: none"> <li>- hold Open House Event in conjunction with Student orientation with introductions to teachers and staff after building set up</li> <li>- send monthly newsletter out to parents.</li> </ul>	SD
	<p><b>Educational Program Development/ Teacher and Staff Recruitment</b></p> <ul style="list-style-type: none"> <li>- move teachers in</li> <li>- hold preservice and prepare for school opening</li> <li>- Train teachers on Core Knowledge curriculum and Singapore Math as well as implementation</li> <li>- collect initial lesson plans</li> <li>- train on teacher observation and evaluations.</li> <li>- finalize school calendar including testing dates and breaks</li> <li>- finalize school daily schedule and bell system</li> </ul>	SD, TCFA
	<p><b>Financial/ Budget/ Grant Management/Governance</b></p> <ul style="list-style-type: none"> <li>- Submit estimated counts to IDOE</li> </ul>	SD
	<p><b>Operations/ Facilities/ Equipment</b></p> <ul style="list-style-type: none"> <li>- set up staff email accounts, and logins to Powerschool, NWEA, Compass Learning and other software programs used.</li> <li>- train on technology use</li> <li>- setup student email accounts</li> <li>- complete inputting all student information into Powerschool</li> <li>- test all technology and building systems</li> <li>- hold practice safety drill for staff and set safety drill schedule</li> </ul>	SD. TCFA
8/16	First Day of School August 7, 2017	

# TOBIAS

INSURANCE GROUP

An AssuredPartners Company



INSURANCE

SELF INSURANCE

RISK MANAGEMENT

EMPLOYEE BENEFITS

SURETY

March 10, 2016

**DeAnna Rowe**  
**TeamCFA**

**RE: Charter School Insurance Estimates for Challenge Foundation Academy in Indianapolis, IN**

Dear Ms. Rowe,

Based on the information you provided, along with my firm's experience with other charter school clients in Indiana, I can provide you with the following insurance cost estimates.

These estimates are based on grades K-2 with approximately 300 students and 15 full-time staff.

Please note that this is not to be interpreted as a binding quote, and actual terms and conditions will only be confirmed through the actual application and underwriting processes. The intent of this letter is to provide an estimate-only for your charter school planning and application approval purposes.

**Commercial Package:** Including \$3,000,000 Property & Inland Marine Values, General Liability, School Leader's Error & Omissions, Sexual Abuse and Molestation, Employee Dishonesty (\$250,000), Non-Owned and Hired Auto, and Employee Benefits Liability: **Annual Premium \$9,005**

**Umbrella Liability Policy** (\$5,000,000): **Annual Premium \$5,450**

**Workers Compensation** (based on 15 staff @ \$45,000 pay per year each): **Annual Premium \$2,500**

**Directors & Officers (D&O) and Employment Practices Liability (EPLI)** (\$1,000,000): **\$2,039**

**Cyber Liability** (\$1,000,000): **\$1,133; Optional Student Accident: \$1,200**

**Group Medical Insurance** (based on 15 full-time staff with an average age of 30 years old and a \$1,500 individual deductible, \$25 office visit copay, 4-tier prescription drug benefit (\$10/\$30/\$60/25%), 80% in-network coinsurance and a \$4,000 out-of-pocket maximum): **Annual Premium \$135,000**

Hopefully these estimates provide you the information you need to complete your budget and charter application. Should you require an actual quote, please let me know.

Sincerely,

Michael R. Share, MBA, RHU  
Vice President - Employee Benefits  
Certified Wellness Specialist & Tobacco Cessation Certified Facilitator  
(317) 402-9785 Cell  
[mshare@tobias.com](mailto:mshare@tobias.com)  
[www.tobias.com](http://www.tobias.com)

School Name: Rosa Parks: A Challenge Foundation Academy

## SCHOOL ENROLLMENT PROJECTIONS

Planned Number of Students																	
ACADEMIC YEAR	K	1	2	3	4	5	6	7	8	9	10	11	12	TOTAL	% ELL	% SPED	% SNAP, TANF or Foster Care
Year 1: 2017-2018	100	100	100	0	0	0	0	0	0	0	0	0	0	300	23%	12%	90%
Year 2: 2018-2019	100	100	100	100	0	0	0	0	0	0	0	0	0	400	23%	12%	90%
Year 3: 2019-2020	100	100	100	100	100	0	0	0	0	0	0	0	0	500	23%	12%	90%
Year 4: 2020-2021	100	100	100	100	100	100	0	0	0	0	0	0	0	600	23%	12%	90%
Year 5: 2021-2022	100	100	100	100	100	100	100	0	0	0	0	0	0	700	23%	12%	90%

Planned Number of Classes														
ACADEMIC YEAR	K	1	2	3	4	5	6	7	8	9	10	11	12	TOTAL
Year 1: 2017-2018	4	4	4	0	0	0	0	0	0	0	0	0	0	12
Year 2: 2018-2019	4	4	4	4	0	0	0	0	0	0	0	0	0	16
Year 3: 2019-2020	4	4	4	4	4	0	0	0	0	0	0	0	0	20
Year 4: 2020-2021	4	4	4	4	4	4	0	0	0	0	0	0	0	24
Year 5: 2021-2022	4	4	4	4	4	4	4	0	0	0	0	0	0	28

**Note: FDK students are treated as 1 for purposes of ADM. 1/2 day kindergarten students are 0.5 ADM**

	2016	2017
Foundation Grant	\$ 4,967	\$ 5,088
Complexity Grant	\$ 3,489	\$ 3,539



School Name: <b>Ross Park: A Challenge Foundation Academy</b>						
	Year 0 2016-2017	Year 1 2017-2018	Year 2 2018-2019	Year 3 2019-2020	Year 4 2020-2021	Year 5 2021-2022
<b>State Revenues</b>						
Block Grant	\$ 2,085,000	\$ 2,780,000	\$ 2,780,000	\$ 3,475,000	\$ 4,170,000	\$ 4,865,000
State Matching Funds for School Lunch Program	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Professional Development	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Technology Admin.	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Responsible Program	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Gifted and Talented Program	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Feedback Reinforcement	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Summer School	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Charter and Innovation Network, School Grant Program	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Charter and Innovation Network, School Advance Program	\$ 175,000	\$ -	\$ -	\$ -	\$ -	\$ -
Other State Revenue (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other State Revenue (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Federal Revenue</b>						
Public Charter School Program (PCSP) Grant	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Public Law 104 (Title I)	\$ 45,000	\$ 45,000	\$ 45,000	\$ 45,000	\$ 45,000	\$ 45,000
Title I	\$ 150,000	\$ 150,000	\$ 150,000	\$ 150,000	\$ 150,000	\$ 150,000
Title II	\$ 15,000	\$ 15,000	\$ 15,000	\$ 15,000	\$ 15,000	\$ 15,000
Federal Lunch Program	\$ 124,871	\$ 166,501	\$ 166,501	\$ 208,131	\$ 249,761	\$ 291,391
Federal Read Fund Reimbursement	\$ 43,871	\$ 58,501	\$ 58,501	\$ 73,131	\$ 87,761	\$ 102,391
Other Revenue Federal sources (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other Revenue Federal sources (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Other Revenues</b>						
Charter and Innovation Network, Challenge Foundation	\$ 35,000	\$ 45,000	\$ 100,000	\$ 100,000	\$ -	\$ -
Before and After Care Fees	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Interest Income	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Student Breakfast	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Student Lunch	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other (please describe)	\$ 110,000	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Total Revenues</b>	\$ 2,440,000	\$ 3,040,000	\$ 3,040,000	\$ 3,730,000	\$ 4,440,000	\$ 5,140,000
<b>EXPENDITURES</b>						
<b>Personnel Expenses</b>						
Salaries, Benefits, and Payroll Taxes	\$ 8,587	\$ 1,211,178	\$ 1,464,989	\$ 1,628,455	\$ 1,791,927	\$ 1,955,398
Salaries - Teachers	\$ -	\$ 24,000	\$ 24,000	\$ 24,000	\$ 24,000	\$ 24,000
Professional Development	\$ -	\$ 11,750	\$ 14,000	\$ 16,500	\$ 18,500	\$ 21,000
Benefits	\$ 28,240	\$ 45,601	\$ 45,601	\$ 45,601	\$ 45,601	\$ 45,601
Other (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Total Personnel Expenses</b>	\$ 8,587	\$ 1,311,548	\$ 1,748,642	\$ 1,951,422	\$ 2,171,027	\$ 2,408,801
<b>Instructional Supplies and Resources</b>						
Textbooks	\$ -	\$ 21,471	\$ 25,201	\$ 46,307	\$ 51,151	\$ 56,571
Library materials, etc.	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Technology	\$ 6,784	\$ 19,012	\$ 19,012	\$ 19,012	\$ 19,012	\$ 19,012
Assessment materials	\$ 8,491	\$ 8,491	\$ 8,491	\$ 8,491	\$ 8,491	\$ 8,491
Computers	\$ 118,554	\$ 50,500	\$ 54,500	\$ 58,500	\$ 62,500	\$ 66,500
Supplies	\$ 8,491	\$ 14,000	\$ 14,000	\$ 14,000	\$ 14,000	\$ 14,000
Other classroom supplies	\$ 15,000	\$ 20,000	\$ 25,000	\$ 30,000	\$ 35,000	\$ 40,000
Field trips, other miscellaneous items	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Co-curricular & Athletics	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Total Instructional Supplies and Resources</b>	\$ 203,662	\$ 153,111	\$ 169,471	\$ 189,411	\$ 211,151	\$ 233,111
<b>Support Supplies and Resources</b>						
Administrative Computer	\$ 5,475	\$ 45,625	\$ 14,600	\$ 9,125	\$ 9,125	\$ 9,100
Administrative Software	\$ 3,500	\$ 6,000	\$ 6,000	\$ 6,000	\$ 6,000	\$ 6,000
Administrative Other (see main expenses)	\$ 1,500	\$ 1,500	\$ 1,500	\$ 1,500	\$ 1,500	\$ 1,500
Office supplies	\$ 6,000	\$ 6,500	\$ 6,500	\$ 6,500	\$ 6,500	\$ 6,500
Other (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Total Support Supplies and Resources</b>	\$ 6,975	\$ 61,625	\$ 38,600	\$ 23,600	\$ 23,625	\$ 23,600
<b>Board Expenses</b>						
Charter Board Services, including Board Training, retreat	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Charter Board Services & Equipment	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Charter Board Fees, etc.	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Total Board Expenses</b>	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Professional Purchased or Contracted Services</b>						
Legal Services	\$ 6,000	\$ 6,100	\$ 6,300	\$ 6,300	\$ 6,500	\$ 6,700
Audit Services (compliant with SBIA requirements)	\$ 1,500	\$ 1,500	\$ 1,500	\$ 1,500	\$ 1,500	\$ 1,500
Payroll Services	\$ 3,000	\$ 3,000	\$ 3,000	\$ 3,000	\$ 3,000	\$ 3,000
Accounting Services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Printing/Newsletters/Annual Report Services	\$ 1,500	\$ 1,200	\$ 1,200	\$ 1,200	\$ 1,111	\$ 1,100
IT/Network	\$ 20,000	\$ 18,000	\$ 18,000	\$ 207,000	\$ 211,000	\$ 217,000
Internet Services	\$ 12,000	\$ 12,500	\$ 12,500	\$ 12,711	\$ 13,111	\$ 13,500
Telephone/Telecommunication Services	\$ 600	\$ 6,000	\$ 6,100	\$ 6,300	\$ 6,500	\$ 6,700
Total Insurance Costs (per ICBA requirements detailed in Budget detail attachment)	\$ 1,500	\$ 1,500	\$ 1,545	\$ 1,591	\$ 1,637	\$ 1,683
Printing	\$ 500	\$ 1,500	\$ 1,500	\$ 1,500	\$ 1,500	\$ 1,500
Special Education Services	\$ 15,300	\$ 17,600	\$ 17,600	\$ 17,600	\$ 17,600	\$ 17,600
Student Information Services	\$ 18,000	\$ 2,500	\$ 2,500	\$ 2,500	\$ 2,500	\$ 2,500
Food services	\$ 168,750	\$ 213,000	\$ 213,000	\$ 213,000	\$ 213,000	\$ 213,000
Transportation	\$ 26,100	\$ 16,100	\$ 16,100	\$ 16,100	\$ 16,100	\$ 16,100
Marketing Services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other - Bank Fees	\$ 60	\$ 120	\$ 120	\$ 120	\$ 120	\$ 120
Other - Allergies	\$ 3,000	\$ 3,000	\$ 3,000	\$ 3,000	\$ 3,000	\$ 3,000
Other - Investment Returns and Maintenance	\$ 3,000	\$ 3,000	\$ 3,000	\$ 3,000	\$ 3,000	\$ 3,000
Other (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Total Professional Purchased or Contracted Services</b>	\$ 22,500	\$ 268,720	\$ 271,900	\$ 417,526	\$ 428,711	\$ 433,900
<b>Facilities</b>						
Heat, electricity, or other facility cost	\$ 3,000	\$ 200,000	\$ 200,000	\$ 400,000	\$ 400,000	\$ 500,000
Insurance & Equipment	\$ 70,000	\$ 17,514	\$ 26,711	\$ 26,711	\$ 21,170	\$ 21,170
Gas/Electricity	\$ 32,000	\$ 40,000	\$ 40,000	\$ 40,000	\$ 40,000	\$ 40,000
Water/Sewer	\$ 8,000	\$ 8,000	\$ 8,000	\$ 8,000	\$ 8,000	\$ 8,000
Outside Services	\$ 16,000	\$ 16,000	\$ 16,000	\$ 16,000	\$ 16,000	\$ 16,000
Maintenance Services	\$ 6,000	\$ 6,000	\$ 6,000	\$ 6,000	\$ 6,000	\$ 6,000
Custodial	\$ 36,000	\$ 48,000	\$ 48,000	\$ 48,000	\$ 48,000	\$ 48,000
Waste/Recycling	\$ 3,000	\$ 3,000	\$ 3,000	\$ 3,000	\$ 3,000	\$ 3,000
Debit Service for Facilities (Interest Only)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other - Security	\$ 1,500	\$ 2,000	\$ 2,500	\$ 3,000	\$ 3,500	\$ 4,000
Other - Equipment Rental	\$ 14,014	\$ 34,000	\$ 34,000	\$ 34,000	\$ 34,000	\$ 34,000
Other - Pest Control	\$ 1,500	\$ 1,500	\$ 1,500	\$ 1,500	\$ 1,500	\$ 1,500
Other - Janitorial Supplies	\$ 7,000	\$ 7,000	\$ 7,000	\$ 7,000	\$ 7,000	\$ 7,000
<b>Total Facilities</b>	\$ 94,799	\$ 337,514	\$ 335,711	\$ 624,711	\$ 624,170	\$ 839,170
<b>Other</b>						
Contingency	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Indiana Charter School Board Administrative Fee	\$ 62,500	\$ 83,400	\$ 108,400	\$ 138,400	\$ 173,400	\$ 213,400
CMO/EMO Fee	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Charter and Innovation Network, School Advance Program	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Principal and Interest	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Revenue assessed for closure	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000
Other (please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other - Challenge Foundation Loan Repayment	\$ 41,500	\$ 41,500	\$ 41,500	\$ 41,500	\$ 41,500	\$ 41,500
<b>Total Other</b>	\$ 114,000	\$ 134,900	\$ 150,900	\$ 181,900	\$ 214,900	\$ 254,900
<b>Total Expenditures</b>	\$ 179,956	\$ 2,646,900	\$ 3,348,552	\$ 3,661,306	\$ 4,174,089	\$ 4,678,921
<b>Current-Year Deficit</b>	\$ 7,044	\$ 16,941	\$ 358,448	\$ 433,044	\$ 627,811	\$ 917,281
<b>Cumulative Carryover Deficit</b>	\$ 7,044	\$ 23,982	\$ 352,431	\$ 885,478	\$ 1,513,289	\$ 2,430,570

	Expected New School Annual Operating Budget and Cash Flow Projections – YEAR 0 – Pre-Opening Period												TOTAL FIRST HALF 2017		
	Jun-16	Jul-16	Aug-16	Sep-16	Oct-16	Nov-16	Dec-16	TOTAL 2016	Jan-17	Feb-17	Mar-17	Apr-17		May-17	Jun-17
<b>Federal Revenue</b>															
Public Charter School Program (PCSP) Grant (NOTE: this is a competitive grant. Funding is not guaranteed.)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other Revenue Federal sources (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Other Revenues</b>															
Committed Philanthropic Donations - Challenge Foundation	-	-	-	-	-	-	-	-	-	-	-	-	-	35,000.00	35,000.00
Student Breakfast	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Student Lunch	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other - Loan from Challenge Foundation	-	-	-	-	-	-	-	-	110,000.00	-	-	-	-	-	110,000.00
<b>Total Revenue</b>	-	-	-	-	-	-	-	-	<b>110,000.00</b>	-	-	-	-	-	<b>110,000.00</b>
	-	-	-	-	-	-	-	-	<b>110,000.00</b>	-	-	-	-	-	<b>145,000.00</b>
<b>EXPENDITURES</b>															
<b>Personnel Expenses</b>															
Wages, Benefits and Payroll Taxes (TOTAL must match 'Staffing Year 0')	-	-	-	-	-	-	-	-	-	-	-	-	-	8,586.67	8,586.67
Professional Development	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Total Personnel Expenses</b>	-	-	-	-	-	-	-	-	-	-	-	-	-	8,586.67	8,586.67
<b>Instructional Supplies and Resources</b>															
Textbooks	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Library, periodicals, etc.	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Technology	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Assessment materials	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Computers	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Software	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other classroom supplies	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Field trips, other unclassified items	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Curriculum & Activities	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Total Instructional Supplies and Resources</b>	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Support Supplies and Resources</b>															
Administrative Computers	-	-	-	-	-	-	-	-	1,825.00	-	-	-	-	-	3,650.00
Administrative Software	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Administrative Dues, fees, misc. expenses	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Office supplies	-	-	-	-	-	-	-	-	250.00	250.00	250.00	250.00	250.00	250.00	1,500.00
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Total Support Supplies and Resources</b>	-	-	-	-	-	-	-	-	<b>2,075.00</b>	<b>250.00</b>	<b>250.00</b>	<b>250.00</b>	<b>250.00</b>	<b>250.00</b>	<b>6,975.00</b>
<b>Board Expenses</b>															
Charter Board Services, including Board Training, retreats	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Charter Board Supplies & Equipment	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Charter Board Dues, fees, etc.	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Total Board Expenses</b>	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Professional Purchased or Contracted Services</b>															
Legal Services	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Audit Services (compliant with SBOA requirements)	-	-	-	-	-	-	-	-	-	-	-	-	-	1,500.00	1,500.00
Payroll Services	-	-	-	-	-	-	-	-	-	-	-	-	-	125.00	125.00
Accounting Services	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Printing/Newsletter/Annual Report Services	-	-	-	-	-	-	-	-	85.00	85.00	85.00	85.00	85.00	85.00	510.00
DNs/Books	-	-	-	-	-	-	-	-	-	-	-	-	-	20,000.00	20,000.00
Internet Services	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Telephone/Telecommunication Services	-	-	-	-	-	-	-	-	100.00	100.00	100.00	100.00	100.00	100.00	600.00
Total Insurance Costs (see ICNB requirements detailed in charter school)	-	-	-	-	-	-	-	-	250.00	250.00	250.00	250.00	250.00	250.00	1,500.00
Travel	-	-	-	-	-	-	-	-	50.00	50.00	50.00	50.00	50.00	50.00	300.00
Postage	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Special Education Services	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Student Information Services	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Food service	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Transportation	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Nursing Services	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Bank Fees	-	-	-	-	-	-	-	-	10.00	10.00	10.00	10.00	10.00	10.00	60.00
Advertising	-	-	-	-	-	-	-	-	500.00	500.00	500.00	500.00	500.00	500.00	3,000.00
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Total Professional Purchased or Contracted Services</b>	-	-	-	-	-	-	-	-	<b>995.00</b>	<b>995.00</b>	<b>995.00</b>	<b>995.00</b>	<b>995.00</b>	<b>22,620.00</b>	<b>27,595.00</b>
<b>Facilities</b>															
Rent, mortgage, or other facility cost	-	-	-	-	-	-	-	-	500.00	500.00	500.00	500.00	500.00	500.00	3,000.00
Furniture & Equipment	-	-	-	-	-	-	-	-	2,500.00	-	-	-	-	-	7,683.00
Gas/electric	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Water/Sewer	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Grounds Keeping	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Maintenance Services	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Custodial	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Waste disposal	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Debt Service for Facilities (Interest Only)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Security	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Technology Infrastructure	-	-	-	-	-	-	-	-	-	-	-	-	-	13,614.00	13,614.00
Equipment Rental	-	-	-	-	-	-	-	-	250.00	250.00	250.00	250.00	250.00	250.00	1,500.00
Instructional Supplies	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Total Facilities</b>	-	-	-	-	-	-	-	-	<b>3,300.00</b>	<b>750.00</b>	<b>750.00</b>	<b>750.00</b>	<b>750.00</b>	<b>88,499.00</b>	<b>94,799.00</b>
<b>Other</b>															
Contingencies	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Indiana Charter School Board Administrative Fee (0% in Year 0)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
CMO/EMO Fee	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Total Other</b>	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Total Expenditures</b>	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 6,370	\$ 1,995	\$ 1,995	\$ 1,995	\$ 1,995	\$ 1,995	\$ 173,606
<b>Net Income (Pre-Cash Flow Adjustments)</b>	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 103,630	\$ (1,995)	\$ (1,995)	\$ (1,995)	\$ (1,995)	\$ (1,995)	\$ 7,044
<b>CASH FLOW ADJUSTMENTS</b>															
OPERATING ACTIVITIES															
Example - Add Back Depreciation	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-



Expected New School Annual Operating Budget -- YEAR 1 -- Fiscal Year July 1-June 30		
	Amount	Notes
<b>State Revenue</b>		
Basic Grant	\$ 2,085,000	\$6,950 per pupil
State Machine Funds for School Lunch Program	\$ -	
Professional Development	\$ -	
Technology Grants	\$ -	
Remediation Program	\$ -	
Gifted and Talented Program	\$ -	
Textbook Reimbursement	\$ -	
Summer School	\$ -	
Charter and Innovation Network School Grant Program	\$ -	While we hope that this funding continues to be available to charter schools, without a guarantee that this will not be cut from future state budgets we are not including it in our projections. If the funding is available, we will use it to enhance our current program.
Charter and Innovation Network School Advance Program	\$ 175,000	Note: Please review IC 20-49-9 for information.
Other State Revenue (please describe)	\$ -	
Other State Revenue (please describe)	\$ -	
<b>Federal Revenue</b>		
Public Charter School Program (PCSP) Grant	\$ -	
Public Law 101-476 (IDEA)	\$ 45,000	Assumes a 12% SPED Population
Title I	\$ 110,000	
Title II	\$ 15,000	
Federal Lunch Program	\$ 124,875	Assumes enrollment in CEP
Federal Breakfast Reimbursement	\$ 43,875	Assumes enrollment in CEP
Other Revenue Federal sources (please describe)	\$ -	
Other Revenue Federal sources (please describe)	\$ -	
<b>Other Revenues</b>		
Committed Philanthropic Donations	\$ 65,000	Balance of 1st year Team CFA start up grant
Before and After Care Fees	\$ -	
Interest Income	\$ -	
Student Breakfast	\$ -	
Student Lunch	\$ -	
Other (please describe)	\$ -	
Other - Loan from Challenge Foundation	\$ -	
<b>Total Revenue</b>	<b>\$ 2,663,750</b>	
<b>EXPENDITURES</b>		
<b>Personnel Expenses</b>		
Wages, Benefits and Payroll Taxes	\$ 1,253,378	See staffing workbook
Substitute Teachers	\$ 18,000	\$150 per day x 120 days. Averages 8 days per teacher
Professional Development	\$ 11,750	
Bonuses	\$ 50,420	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
<b>Total Personnel Expenses</b>	<b>\$ 1,333,548</b>	
<b>Instructional Supplies and Resources</b>		
Textbooks	\$ 72,472	Core Knowledge CKLA, Singapore Math
Library, periodicals, etc	\$ -	Distributed by Kanby
Technology	\$ 62,784	Smartboards, Doc. Cameras, Projectors
Assessment materials	\$ 6,450	NWEA & Other
Computers	\$ 118,556	1:1 Chromebooks & Staff Computers
Software	\$ 8,400	Common Core, etc. & Other
Other classroom supplies	\$ 15,000	\$5,000 per grade level
Field trips, other unclassified items	\$ -	
Co-curricular & Athletics	\$ -	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
<b>Total Instructional Supplies and Resources</b>	<b>\$ 283,662</b>	
<b>Support Supplies and Resources</b>		
Administrative Computers	\$ 45,625	Administrative Staff Computers
Administrative Software	\$ 8,500	Business, Attendance and Accounting Software
Administration Dues, fees, misc expenses	\$ 1,500	Misc memberships
Office supplies	\$ 6,000	Consistent with Team CFA schools of similar size
Other (please describe)	\$ -	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
<b>Total Support Supplies and Resources</b>	<b>\$ 61,625</b>	
<b>Board Expenses</b>		
Charter Board Services, including Board Training, retreats	\$ -	
Charter Board Supplies & Equipment	\$ -	
Charter Board Dues, fees, etc	\$ -	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
<b>Total Board Expenses</b>	<b>\$ -</b>	
<b>Professional Purchased or Contracted Services</b>		
Legal Services	\$ 6,000	Consistent with Team CFA schools of similar size
Audit Services (compliant with SBOA requirements)	\$ -	
Payroll Services	\$ 3,000	Consistent with Team CFA schools of similar size
Accounting Services	\$ -	
Printing/Newsletter/Annual Report Services	\$ 1,200	Consistent with Team CFA schools of similar size
INSchools	\$ 165,000	
Internet Services	\$ 12,000	Consistent with Team CFA schools of similar size
Telephone/Telecommunication Services	\$ 6,000	Consistent with Team CFA schools of similar size
Total Insurance Costs (per ICSD requirements detailed in charter school application)	\$ 18,000	Consistent with Team CFA schools of similar size
Travel	\$ 1,500	Consistent with Team CFA schools of similar size
Postage	\$ 1,500	Consistent with Team CFA schools of similar size
Special Education Services	\$ 23,200	
Student Information Services	\$ 18,000	Consistent with Team CFA schools of similar size
Food service	\$ 168,750	Consistent with Team CFA schools of similar size
Transportation	\$ 76,100	See detail
Nursing Services	\$ -	
Bank Fees	\$ 120	Consistent with Team CFA schools of similar size
Advertising	\$ 3,000	Consistent with Team CFA schools of similar size
Equipment Repair & Maintenance	\$ 3,000	Consistent with Team CFA schools of similar size
Other (please describe)	\$ -	
<b>Total Professional Purchased or Contracted Services</b>	<b>\$ 506,370</b>	
<b>Facilities</b>		
Rent, mortgage, or other facility cost	\$ 200,000	Consistent with Team CFA schools of similar size
Furniture & Equipment	\$ 37,554	See Detailed Schedule
Gas/Electricity	\$ 24,000	Consistent with Team CFA schools of similar size
Water/ Sewer	\$ 6,000	Consistent with Team CFA schools of similar size
Grounds Keeping	\$ 12,000	Consistent with Team CFA schools of similar size
Maintenance Services	\$ 6,000	Consistent with Team CFA schools of similar size
Custodial	\$ 36,000	Consistent with Team CFA schools of similar size
Waste disposal	\$ 3,000	Consistent with Team CFA schools of similar size
Debt Service for Facilities (Interest Only)	\$ -	
Security	\$ 1,500	Consistent with Team CFA schools of similar size
Equipment Rental	\$ 24,000	Consistent with Team CFA schools of similar size
Pest Control	\$ 1,500	Consistent with Team CFA schools of similar size
Janitorial Supplies	\$ 6,000	Consistent with Team CFA schools of similar size
<b>Total Facilities</b>	<b>\$ 357,554</b>	
<b>Other</b>		
Contingency	\$ -	
Indiana Charter School Board Administrative Fee	\$ 62,550	Assume 3% of Basic Grant (Row 6). Be certain to reflect the full amount of any fee, including the management fee and any pass-through fees. If pass-through fees are reflected elsewhere in the budget, please clearly indicate this in the Budget Narrative.
CMO/EMO Fee	\$ -	
Charter and Innovation Network School Advance Program Principal and Interest	\$ -	
Escrow account for dissolution / closure	\$ -	Schools are required to maintain an account in reserve to cover expenses for school closing. \$10,000 should be placed in reserve starting in year 2 with a balance of \$30,000 by year 4.
Other (please describe)	\$ -	
Other - Challenge Foundation Loan Repayment	\$ 41,500	
<b>Total Other</b>	<b>\$ 104,050</b>	
<b>Total Expenditures</b>	<b>\$ 2,646,809</b>	
<b>Carryover/Deficit</b>	<b>\$ 16,941</b>	

Cumulative Carryover/(Deficit) \$ 23,986

**Expected Charter School Staffing Needs -- Year 1**

**Benefits Assumptions - Please describe how you calculated your benefits and what is included below**

**Benefits include payroll taxes - 8% of salaries, retirement - 7.5% of certified salaries and 4% of non-certified salaries, and total health benefits equaling \$4,800 per FT employee.**

<b>Position Description</b>	<b>Number of Staff Per Position</b>	<b>Average Salary for the Position</b>	<b>Total Salary</b>	<b>Benefits and Payroll Taxes</b>	<b>TOTAL Salary and Benefits</b>
School Director	1	90,000	90,000	18,750	108,750
Dean of Students	1	60,000	60,000	12,000	72,000
Social Worker	1	46,000	46,000	11,930	57,930
Admin Asst/Registrar	1	32,000	32,000	8,640	40,640
Entry Level Classroom Teacher (Year 1)	9	40,000	360,000	99,000	459,000
Experienced Classroom Teacher (Year 1)	3	42,000	126,000	33,930	159,930
			-		-
Specials Teacher - Music/Art (Year 1)	1	38,000	38,000	9,360	47,360
Specials Teacher - PE (Year 1)	1	38,000	38,000	9,360	47,360
			-		-
Instructional Aides (Year 1) - PT	6	14,400	86,400	10,368	96,768
Instructional Aides (Year 1) - FT	2	28,000	56,000	16,320	72,320
			-		-
SPED Instructor (Year 1)	1	40,000	40,000	11,000	51,000
SPED Aides (Year 1) - PT	1	14,400	14,400	1,728	16,128
			-		-
Bus Driver - PT	3	7,200	21,600	2,592	24,192
			-		-
			-		-
			-		-
			-		-
			-		-
			-		-
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			-		-
			-		-
			-		-
			-		-
			-		-
			-		-
			-		-
<b>TOTAL</b>			1,008,400	244,978	1,253,378

Expected New School Annual Operating Budget -- YEAR 2 -- Fiscal Year July 1-June 30		
	Amount	Notes
<b>State Revenue</b>		
Basic Grant	\$ 2,780,000	\$6,950 per pupil
State Matching Funds for School Lunch Program	\$ -	
Professional Development	\$ -	
Technology Grants	\$ -	
Remediation Program	\$ -	
Gifted and Talented Program	\$ -	
Textbook Reimbursement	\$ -	
Summer School	\$ -	
Charter and Innovation Network School Grant Program	\$ -	
Charter and Innovation Network School Advance Program	\$ -	Note: Please review IC 28-49-9 for information.
Other State Revenue (please describe)	\$ -	
Other State Revenue (please describe)	\$ -	
<b>Federal Revenue</b>		
Public Charter School Program (PCSP) Grant	\$ -	
Public Law 101-476 (IDEA)	\$ 48,500	Assumes a 12% SPED Population
Title I	\$ 135,000	
Title II	\$ 18,500	
Federal Lunch Program	\$ 166,500	Assumes enrollment in CEP
Federal Breakfast Reimbursement	\$ 58,500	Assumes enrollment in CEP
Other Revenue Federal sources (please describe)	\$ -	
Other Revenue Federal sources (please describe)	\$ -	
<b>Other Revenue</b>		
Committed Philanthropic Donations	\$ 100,000	2nd year Team CPA start-up amount
Before and After Care Fees	\$ -	
Interest Income	\$ -	
Student Breakfast	\$ -	
Student Lunch	\$ -	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
<b>Total Revenue</b>	\$ 3,307,000	
<b>EXPENDITURES</b>		
<b>Personnel Expenses</b>		
Wages, Benefits and Payroll Taxes	\$ 1,644,949	See narrative workbook
Substitute Teachers	\$ 24,000	\$10 per day, 8 days per teacher
Professional Development	\$ 14,000	
Bonuses	\$ 65,693	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
<b>Total Personnel Expenses</b>	\$ 1,748,642	
<b>Instructional Supplies and Resources</b>		
Textbooks	\$ 43,201	Core Knowledge, CREA, Singapore Math
Library, periodicals, etc	\$ -	Indistinct by Budget
Technology	\$ 19,032	Smartboards, Disc Cameras, Projectors
Assessment materials	\$ 8,600	NWEA & Other
Computers	\$ 50,300	111 Chromebooks & Staff Computers
Software	\$ 11,200	Curriculum Mastery & Other
Other classroom supplies	\$ 20,000	\$5,000 per grade level
Field trips, other unclassified items	\$ -	
Co-curricular & Athletics	\$ -	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
<b>Total Instructional Supplies and Resources</b>	\$ 152,333	
<b>Support Supplies and Resources</b>		
Administrative Computers	\$ 14,600	
Administrative Software	\$ 6,000	
Administration Dues, fees, misc expenses	\$ 1,500	Misc memberships
Office supplies	\$ 6,300	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
<b>Total Support Supplies and Resources</b>	\$ 28,400	
<b>Board Expenses</b>		
Charter Board Services, including Board Trainings, retreats	\$ -	
Charter Board Supplies & Equipment	\$ -	
Charter Board Dues, fees, etc	\$ -	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
<b>Total Board Expenses</b>	\$ -	
<b>Professional Purchased or Contracted Services</b>		
Legal Services	\$ 6,180	3% increase from prior year
Audit Services (compliant with SBOA requirements)	\$ 12,000	Consistent with schools in the Team CPA Network
Payroll Services	\$ 3,090	3% increase from prior year
Accounting Services	\$ -	
Printing/Newsletter/Annual Report Services	\$ 1,236	3% increase from prior year
INSchools	\$ 198,000	
Internet Services	\$ 12,360	3% increase from prior year
Telephone/Telecommunication Services	\$ 6,180	3% increase from prior year
Total Insurance Costs (per IC SB requirements detailed in charter school application)	\$ 18,540	3% increase from prior year
Travel	\$ 1,545	3% increase from prior year
Postage	\$ 1,545	3% increase from prior year
Special Education Services	\$ 37,600	
Student Information Services	\$ 2,500	Consistent with schools in the Team CPA Network
Food service	\$ 225,000	
Transportation	\$ 16,100	See Detail
Nursing Services	\$ -	
Bank Fees	\$ 120	Consistent with schools in the Team CPA Network
Advertising	\$ 3,000	Consistent with schools in the Team CPA Network
Equipment Repair & Maintenance	\$ 3,000	Consistent with schools in the Team CPA Network
Other (please describe)	\$ -	
<b>Total Professional Purchased or Contracted Services</b>	\$ 547,996	
<b>Facilities</b>		
Rent, mortgage, or other facility cost	\$ 320,000	Consistent with schools in the Team CPA Network
Furniture & Equipment	\$ 26,781	See Detail
Gas/electric	\$ 32,000	Consistent with schools in the Team CPA Network
Water/ Sewer	\$ 8,000	Consistent with schools in the Team CPA Network
Grounds Keeping	\$ 16,000	Consistent with schools in the Team CPA Network
Maintenance Services	\$ 8,000	Consistent with schools in the Team CPA Network
Custodial	\$ 48,000	Consistent with schools in the Team CPA Network
Waste disposal	\$ 4,000	Consistent with schools in the Team CPA Network
Debt Service for Facilities (Interest Only)	\$ -	Consistent with schools in the Team CPA Network
Security	\$ 2,000	Consistent with schools in the Team CPA Network
Equipment Rental	\$ 32,000	Consistent with schools in the Team CPA Network
Pest Control	\$ 2,000	Consistent with schools in the Team CPA Network
Janitorial Supplies	\$ 7,000	Consistent with schools in the Team CPA Network
<b>Total Facilities</b>	\$ 505,781	
<b>Other</b>		
Contingency	\$ -	
Indiana Charter School Board Administrative Fee	\$ 83,400	Assume 3% of Basic Grant (Row 6). Be certain to reflect the full amount of any fee, including the management fee and any pass-through fees. If pass-through fees are reflected elsewhere in the budget, please clearly indicate this in the Budget Narrative.
CMO/EMO Fee	\$ -	
Charter and Innovation Network School Advance Program Principal and Interest	\$ 32,000	Schools are required to maintain an account in reserve to cover expenses for school closing. \$10,000 should be placed in reserve starting in year 2 with a balance of \$30,000 by year 4.
Escrow account for disillusionment / closure	\$ 10,000	
Other (please describe)	\$ -	
Other - Challenge Foundation Loan Repayment	\$ 40,000	
<b>Total Other</b>	\$ 165,400	
<b>Total Expenditures</b>	\$ 3,148,552	
<b>Carryover/Deficit</b>	\$ 158,448	
Cumulative Carryover/Deficit	\$ 182,434	



Expected New School Annual Operating Budget -- YEAR 3 -- Fiscal Year July 1-June 30		
	Amount	Notes
<b>State Revenue</b>		
Basic Grant	\$ 3,475,000	\$6,950 per pupil
State Matching Funds for School Lunch Program	\$ -	
Professional Development	\$ -	
Technology Grants	\$ -	
Remediation Program	\$ -	
Gifted and Talented Program	\$ -	
Textbook Reimbursement	\$ -	
Summer School	\$ -	
Charter and Innovation Network School Grant Program	\$ -	
Charter and Innovation Network School Advance Program	\$ -	Note: Please review IC 20-49-9 for information.
Other State Revenue (please describe)	\$ -	
Other State Revenue (please describe)	\$ -	
<b>Federal Revenue</b>		
Public Law 101-476 (IDEA)	\$ 52,000	Assumes a 12% SPED Population
Title I	\$ 165,000	
Title II	\$ 21,000	
Federal Lunch Program	\$ 208,125	Assumes enrollment in CEP
Federal Breakfast Reimbursement	\$ 73,125	Assumes enrollment in CEP
Other Revenue Federal sources (please describe)	\$ -	
Other Revenue Federal sources (please describe)	\$ -	
<b>Other Revenues</b>		
Committed Philanthropic Donations	\$ 100,000	2nd year Team CPA start-up grant
Before and After Care Fees	\$ -	
Interest Income	\$ -	
Student Breakfast	\$ -	Assumes 10% participation - \$1.50 per day
Student Lunch	\$ -	Assumes 10% participation - \$2.85 per day
Other (please describe)	\$ -	
Other (please describe)	\$ -	
<b>Total Revenue</b>	<b>\$ 4,094,250</b>	
<b>EXPENDITURES</b>		
<b>Personnel Expenses</b>		
Wages, Benefits and Payroll Taxes	\$ 1,928,455	See staffing spreadsheet
Substitute Teachers	\$ 30,000	\$150 per day/8 days per teacher
Professional Development	\$ 16,250	
Bonuses	\$ 76,723	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
<b>Total Personnel Expenses</b>	<b>\$ 2,051,429</b>	
<b>Instructional Supplies and Resources</b>		
Textbooks	\$ 46,397	Core Knowledge, CKLA, Singapore Math
Library, periodicals, etc	\$ -	Distributed by Kindle
Technology	\$ 19,032	Smartboards, Doc Camera, Projectors
Assessment materials	\$ 10,750	NWEA & Other
Computers	\$ 54,300	1:1 Chromebooks & Staff Computers
Software	\$ 14,000	Compass Odors & Other
Other classroom supplies	\$ 25,000	\$5,000 per grade level
Fund trips, other unclassified items	\$ -	
Co-curricular & Athletics	\$ -	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
<b>Total Instructional Supplies and Resources</b>	<b>\$ 169,479</b>	
<b>Support Supplies and Resources</b>		
Administrative Computers	\$ 9,125	
Administrative Software	\$ 6,000	
Administration Dues, fees, misc expenses	\$ 1,500	Misc. memberships
Office supplies	\$ 6,615	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
<b>Total Support Supplies and Resources</b>	<b>\$ 23,240</b>	
<b>Board Expenses</b>		
Charter Board Services, including Board Training, retreats	\$ -	
Charter Board Supplies & Equipment	\$ -	
Charter Board Dues, fees, etc	\$ -	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
<b>Total Board Expenses</b>	<b>\$ -</b>	
<b>Professional Purchased or Contracted Services</b>		
Legal Services	\$ 6,365	3% increase from prior year
Audit Services (compliant with SBOA requirements)	\$ 12,360	Consistent with schools in the Team CPA Network
Payroll Services	\$ 3,183	3% increase from prior year
Accounting Services	\$ -	
Printing-Newsletter/Annual Report Services	\$ 1,273	3% increase from prior year
INschools	\$ 207,000	
Internet Services	\$ 12,731	3% increase from prior year
Telephone/Telecommunication Services	\$ 6,365	3% increase from prior year
Total Insurance Costs (per ICSB requirements detailed in charter school application)	\$ 19,096	3% increase from prior year
Travel	\$ 1,591	3% increase from prior year
Postage	\$ 1,591	3% increase from prior year
Special Education Services	\$ 40,000	
Student Information Services	\$ 2,500	Consistent with schools in the Team CPA Network
Food service	\$ 281,250	
Transportation	\$ 16,100	See Detail
Nursing Services	\$ -	
Bank Fees	\$ 120	Consistent with schools in the Team CPA Network
Advertising	\$ 3,000	Consistent with schools in the Team CPA Network
Equipment Repair & Maintenance	\$ 3,000	Consistent with schools in the Team CPA Network
Other (please describe)	\$ -	
<b>Total Professional Purchased or Contracted Services</b>	<b>\$ 617,526</b>	
<b>Facilities</b>		
Rent, mortgage, or other facility cost	\$ 400,000	Consistent with schools in the Team CPA Network
Furniture & Equipment	\$ 26,781	See Detail
Gas/electric	\$ 40,000	Consistent with schools in the Team CPA Network
Water/ Sewer	\$ 10,000	Consistent with schools in the Team CPA Network
Grounds Keeping	\$ 20,000	Consistent with schools in the Team CPA Network
Maintenance Services	\$ 10,000	Consistent with schools in the Team CPA Network
Custodial	\$ 60,000	Consistent with schools in the Team CPA Network
Waste disposal	\$ 5,000	Consistent with schools in the Team CPA Network
Desk Services for Facilities (Interest Only)	\$ -	Consistent with schools in the Team CPA Network
Security	\$ 2,500	Consistent with schools in the Team CPA Network
Equipment Rental	\$ 40,000	Consistent with schools in the Team CPA Network
Pest Control	\$ 2,500	Consistent with schools in the Team CPA Network
Janitorial Supplies	\$ 8,000	Consistent with schools in the Team CPA Network
<b>Total Facilities</b>	<b>\$ 628,781</b>	
<b>Other</b>		
Contingency	\$ -	
Indiana Charter School Board Administrative Fee	\$ 104,250	Assume 3% of Basic Grant (Row 6). Be certain to reflect the full amount of any fee, including the management fee and any pass-through fees. If pass-through fees are reflected elsewhere in the budget, please clearly indicate this in the Budget Narrative.
CMO/EMO Fee	\$ -	
Charter and Innovation Network School Advance Program Principal and Interest	\$ 23,000	Schools are required to maintain an account in reserve to cover expenses for school closing. \$10,000 should be placed in reserve starting in year 2 with a balance of \$30,000 by year 4.
Escrow account for dislittlement / closure	\$ 10,000	
Other (please describe)	\$ -	
Other - Challenge Foundation Loan Repayment	\$ 37,500	
<b>Total Other</b>	<b>\$ 174,750</b>	
<b>Total Expenditures</b>	<b>\$ 3,661,206</b>	
<b>Carryover/Deficit</b>	<b>\$ 433,044</b>	
Cumulative Carryover/(Deficit)	\$ 615,478	





Expected New School Annual Operating Budget -- YEAR 4 -- Fiscal Year July 1-June 30		
	Amount	Notes
<b>State Revenue</b>		
Basic Grant	\$ 4,170,000	\$6,950 per pupil
State Machine Funds for School Lunch Program	\$ -	
Professional Development	\$ -	
Technology Grants	\$ -	
Remediation Program	\$ -	
Gifted and Talented Program	\$ -	
Textbook Reimbursement	\$ -	
Summer School	\$ -	
Charter and Innovation Network School Grant Program	\$ -	
Charter and Innovation Network School Advance Program	\$ -	Note: Please review IC 20-49-9 for information.
Other State Revenue (please describe)	\$ -	
Other State Revenue (please describe)	\$ -	
<b>Federal Revenue</b>		
Public Law 101-476 (IDEA)	\$ 56,000	Assumes a 12% SPED Population
Title I	\$ 200,000	
Title II	\$ 24,000	
Federal Lunch Program	\$ 249,750	Assumes enrollment in CEP
Federal Breakfast Reimbursement	\$ 87,750	Assumes enrollment in CEP
Other Revenue Federal sources (please describe)	\$ -	
Other Revenue Federal sources (please describe)	\$ -	
<b>Other Revenues</b>		
Committed Philanthropic Donations	\$ -	
Before and After Care Fees	\$ -	
Interest Income	\$ -	
Student Breakfast	\$ -	
Student Lunch	\$ -	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
<b>Total Revenue</b>	<b>\$ 4,787,500</b>	
<b>EXPENDITURES</b>		
<b>Personnel Expenses</b>		
Wages, Benefits and Payroll Taxes	\$ 2,730,927	See salaries worksheet
Substitute Teachers	\$ 36,000	\$150 per day 8 days per teacher
Professional Development	\$ 18,500	
Bonuses	\$ 88,574	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
<b>Total Personnel Expenses</b>	<b>\$ 2,373,952</b>	
<b>Instructional Supplies and Resources</b>		
Textbooks	\$ 53,151	Core Knowledge, CKLA, Sonlight Math
Library, periodicals, etc	\$ -	Distributed by Kindle
Technology	\$ 19,032	Smartboards, Doc Cameras, Projectors
Assessment materials	\$ 12,900	NWEA & Other
Computers	\$ 58,300	1:1 Chromebooks & Staff Computers
Software	\$ 16,800	Common Edware & Other
Other classroom supplies	\$ 30,000	\$5,000 per grade level
Field trips, other unclassified items	\$ -	
Co-curricular & Athletics	\$ -	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
<b>Total Instructional Supplies and Resources</b>	<b>\$ 190,183</b>	
<b>Support Supplies and Resources</b>		
Administrative Computers	\$ 9,125	
Administrative Software	\$ 6,000	
Administration Dues, fees, misc expenses	\$ 1,500	Misc memberships
Office supplies	\$ 6,946	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
<b>Total Support Supplies and Resources</b>	<b>\$ 23,571</b>	
<b>Board Expenses</b>		
Charter Board Services, including Board Training, retreats	\$ -	
Charter Board Supplies & Equipment	\$ -	
Charter Board Dues, fees, etc	\$ -	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
<b>Total Board Expenses</b>	<b>\$ -</b>	
<b>Professional Purchased or Contracted Services</b>		
Legal Services	\$ 6,556	1% increase from prior year
Audit Services (compliant with SBOA requirements)	\$ 12,731	Consistent with schools in the Team CFA Network
Payroll Services	\$ 3,278	1% increase from prior year
Accounting Services	\$ -	
Printing/Newsletter/Annual Report Services	\$ 1,311	1% increase from prior year
INSchools	\$ 213,000	
Internet Services	\$ 13,113	1% increase from prior year
Telephone/Telecommunication Services	\$ 6,556	1% increase from prior year
Total Insurance Costs (per ICSD requirements detailed in charter school application)	\$ 19,669	1% increase from prior year
Travel	\$ 1,639	1% increase from prior year
Postage	\$ 1,639	1% increase from prior year
Special Education Services	\$ 48,000	
Student Information Services	\$ 2,500	Consistent with schools in the Team CFA Network
Food service	\$ 377,500	
Transportation	\$ 16,100	See Detail
Nursing Services	\$ -	
Bank Fees	\$ 120	Consistent with schools in the Team CFA Network
Advertising	\$ 3,000	Consistent with schools in the Team CFA Network
Equipment Repair & Maintenance	\$ 3,000	Consistent with schools in the Team CFA Network
Other (please describe)	\$ -	
<b>Total Professional Purchased or Contracted Services</b>	<b>\$ 689,714</b>	
<b>Facilities</b>		
Rent, mortgage, or other facility cost	\$ 480,000	Consistent with schools in the Team CFA Network
Furniture & Equipment	\$ 23,170	See Detail
Gas/electric	\$ 48,000	Consistent with schools in the Team CFA Network
Water/ Sewer	\$ 12,000	Consistent with schools in the Team CFA Network
Grounds Keeping	\$ 24,000	Consistent with schools in the Team CFA Network
Maintenance Services	\$ 12,000	Consistent with schools in the Team CFA Network
Custodial	\$ 72,000	Consistent with schools in the Team CFA Network
Waste disposal	\$ 6,000	Consistent with schools in the Team CFA Network
Debt Service for Facilities (Interest Only)	\$ -	Consistent with schools in the Team CFA Network
Security	\$ 3,000	Consistent with schools in the Team CFA Network
Equipment Rental	\$ 48,000	Consistent with schools in the Team CFA Network
Pest Control	\$ 3,000	Consistent with schools in the Team CFA Network
Janitorial Supplies	\$ 9,000	Consistent with schools in the Team CFA Network
<b>Total Facilities</b>	<b>\$ 740,170</b>	
<b>Other</b>		
Contingency	\$ -	
Indiana Charter School Board Administrative Fee	\$ 125,100	Assume 3% of Basic Grant (Row 6). Be certain to reflect the full amount of any fee, including the management fee and any pass-through fees. If pass-through fees are reflected elsewhere in the budget, please clearly indicate this in the Budget Narrative.
CMO/EMO Fee	\$ -	
Charter and Innovation Network School Advance Program Principal and Interest	\$ 22,000	
	\$ -	Schools are required to maintain an account in reserve to cover expenses for school closing. \$10,000 should be placed in reserve starting in year 2 with a balance of \$0,000 by year 4.
Escrow account for dissolution / closure	\$ 10,000	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
<b>Total Other</b>	<b>\$ 157,100</b>	
<b>Total Expenditures</b>	<b>\$ 4,174,689</b>	
<b>Carryover/Deficit</b>	<b>\$ 612,811</b>	

Cumulative Carryover/(Deficit) \$ 1,228,250



Expected New School Annual Operating Budget -- YEAR 5 -- Fiscal Year July 1-June 30		
	Amount	Notes
<b>State Revenue</b>		
Basic Grant	\$ 4,865,000	\$6,950 per pupil
State Matching Funds for School Lunch Program	\$ -	
Professional Development	\$ -	
Technology Grants	\$ -	
Remediation Program	\$ -	
Gifted and Talented Program	\$ -	
Textbook Reimbursement	\$ -	
Summer School	\$ -	
Charter and Innovation Network School Grant Program	\$ -	
Charter and Innovation Network School Advance Program	\$ -	Note: Please review IC 20-40-9 for information.
Other State Revenue (please describe)	\$ -	
Other State Revenue (please describe)	\$ -	
<b>Federal Revenue</b>		
Public Law 101-476 (IDEA)	\$ 65,100	Assumes a 12% SPED Population
Title I	\$ 245,000	
Title II	\$ 27,000	
Federal Lunch Program	\$ 791,375	Assumes enrollment in CEP
Federal Breakfast Reimbursement	\$ 102,375	Assumes enrollment in CEP
Other Revenue Federal sources (please describe)	\$ -	
Other Revenue Federal sources (please describe)	\$ -	
<b>Other Revenues</b>		
Committed Philanthropic Donations	\$ -	
Before and After Care Fees	\$ -	
Interest Income	\$ -	
Student Breakfast	\$ -	
Student Lunch	\$ -	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
<b>Total Revenue</b>	\$ 5,595,850	
<b>EXPENDITURES</b>		
<b>Personnel Expenses</b>		
Wages, Benefits and Payroll Taxes	\$ 2,503,236	1% staffing needs book
Substitute Teachers	\$ 42,000	\$150 per day/8 days per teacher
Professional Development	\$ 24,500	
Bonuses	\$ 99,145	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
<b>Total Personnel Expenses</b>	\$ 2,668,881	
<b>Instructional Supplies and Resources</b>		
Textbooks	\$ 56,533	Core Knowledge, CKLA, Singapore Math
Library, periodicals, etc	\$ -	Distributed by Kindle
Technology	\$ 19,023	Smartboards, Doc Cameras, Projectors
Assessment materials	\$ 15,050	NWEA & Other
Computers	\$ 62,300	1:1 Chromebooks & Staff Computers
Software	\$ 19,600	Compass Odyssey & Other
Other classroom supplies	\$ 35,000	\$5,000 per grade level
Field trips, other unclassified items	\$ -	
Co-curricular & Athletics	\$ -	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
<b>Total Instructional Supplies and Resources</b>	\$ 207,515	
<b>Support Supplies and Resources</b>		
Administrative Computers	\$ 7,300	
Administrative Software	\$ 6,000	
Administration Dues, fees, misc expenses	\$ 1,500	Misc memberships
Office supplies	\$ 7,293	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
<b>Total Support Supplies and Resources</b>	\$ 22,093	
<b>Board Expenses</b>		
Charter Board Services, including Board Training, retreats	\$ -	
Charter Board Supplies & Equipment	\$ -	
Charter Board Dues, fees, etc	\$ -	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
<b>Total Board Expenses</b>	\$ -	
<b>Professional Purchased or Contracted Services</b>		
Legal Services	\$ 6,753	3% increase from prior year
Audit Services (compliant with SBOA requirements)	\$ 13,113	Consistent with schools in the Team CPA Network
Payroll Services	\$ 3,377	3% increase from prior year
Accounting Services	\$ -	
Printing-Newsletter/Annual Report Services	\$ 1,351	3% increase from prior year
INschools	\$ 217,000	
Internet Services	\$ 13,506	3% increase from prior year
Telephone/Telecommunication Services	\$ 6,753	3% increase from prior year
Total Insurance Costs (per ICSB requirements detailed in charter school application)	\$ 20,259	3% increase from prior year
Travel	\$ 1,688	3% increase from prior year
Postage	\$ 1,688	3% increase from prior year
Special Education Services	\$ 50,000	
Student Information Services	\$ 2,500	Consistent with schools in the Team CPA Network
Food service	\$ 393,750	
Transportation	\$ 16,100	See Detail
Nursing Services	\$ -	
Bank Fees	\$ 120	Consistent with schools in the Team CPA Network
Advertising	\$ 3,000	Consistent with schools in the Team CPA Network
Equipment Repair & Maintenance	\$ 3,000	Consistent with schools in the Team CPA Network
Other (please describe)	\$ -	
<b>Total Professional Purchased or Contracted Services</b>	\$ 753,958	
<b>Facilities</b>		
Rent, mortgage, or other facility cost	\$ 560,000	Consistent with schools in the Team CPA Network
Furniture & Equipment	\$ 23,170	See Detail
Gas/electric	\$ 56,000	Consistent with schools in the Team CPA Network
Water/ Sewer	\$ 14,000	Consistent with schools in the Team CPA Network
Grounds Keeping	\$ 28,000	Consistent with schools in the Team CPA Network
Maintenance Services	\$ 14,000	Consistent with schools in the Team CPA Network
Custodial	\$ 84,000	Consistent with schools in the Team CPA Network
Waste disposal	\$ 7,000	Consistent with schools in the Team CPA Network
Dish Services for Facilities (Interest Only)	\$ -	Consistent with schools in the Team CPA Network
Security	\$ 3,500	Consistent with schools in the Team CPA Network
Equipment Rental	\$ 56,000	Consistent with schools in the Team CPA Network
Pest Control	\$ 3,500	Consistent with schools in the Team CPA Network
Janitorial Supplies	\$ 10,000	Consistent with schools in the Team CPA Network
<b>Total Facilities</b>	\$ 859,170	
<b>Other</b>		
Contingency	\$ -	
Indiana Charter School Board Administrative Fee	\$ 145,950	Assume 3% of Basic Grant (Row 6). Be certain to reflect the full amount of any fee, including the management fee and any pass-through fees. If pass-through fees are reflected elsewhere in the budget, please clearly indicate this in the Budget Narrative.
CMO/EMO Fee	\$ -	
Charter and Innovation Network School Advance Program Principal and Interest	\$ 21,000	Schools are required to maintain an account in reserve to cover expenses for school closing. \$10,000 should be placed in reserve starting in year 3 with a balance of \$30,000 by year 4.
Escrow account for dissolution / closure	\$ -	
Other (please describe)	\$ -	
Other (please describe)	\$ -	
<b>Total Other</b>	\$ 166,950	
<b>Total Expenditures</b>	\$ 4,678,567	
<b>Carryover/Deficit</b>	\$ 917,283	

Cumulative Carryover(Deficit) \$ 2,145,573

**Expected Charter School Staffing Needs -- Year 5**

**Benefits Assumptions - Please describe how you calculated your benefits and what is included below**

Benefits include payroll taxes - 8% of salaries, retirement - 7.5% of certified salaries and 4% of non-certified salaries, and total health benefits equaling \$5,400 per FT employee.

<b>Position Description</b>	<b>Number of Staff Per Position</b>	<b>Average Salary for the Position</b>	<b>Total Salary</b>	<b>Benefits and Payroll Taxes</b>	<b>TOTAL Salary and Benefits</b>
School Director	1	101,296	101,296	21,101	122,397
Dean of Students	1	67,531	67,531	13,504	81,034
Social Worker	1	51,773	51,773	13,425	65,198
Adm Asst/Registrar	1	36,016	36,016	9,722	45,738
Administrative Assistant (Year 2)	1	20,980	20,980	7,918	28,898
Administrative Assistant (Year 3)	1	20,369	20,369	7,844	28,214
			-		-
Entry Level Classroom Teacher (Year 1)	9	45,020	405,183	111,403	516,587
Entry Level Classroom Teacher (Year 2)	2	43,709	87,418	24,350	111,768
Entry Level Classroom Teacher (Year 3)	3	42,436	127,308	35,933	163,241
Entry Level Classroom Teacher (Year 4)	3	41,200	123,600	35,358	158,958
Entry Level Classroom Teacher (Year 5)	3	40,000	120,000	34,800	154,800
Experienced Classroom Teacher (Year 1)	3	47,271	141,814	38,181	179,995
Experienced Classroom Teacher (Year 2)	1	45,895	45,895	12,514	58,408
Experienced Classroom Teacher (Year 3)	1	44,558	44,558	12,306	56,864
Experienced Classroom Teacher (Year 4)	1	43,260	43,260	12,105	55,365
Experienced Classroom Teacher (Year 5)	1	42,000	42,000	11,910	53,910
Lead Classroom Teacher (Year 1)	1	54,636	54,636	13,869	68,505
			-		-
Specials Teacher - Music/Art (Year 1)	1	42,769	42,769	10,532	53,302
Specials Teacher - PE (Year 1)	1	42,769	42,769	10,532	53,302
			-		-
Instructional Aides (Year 1) - PT	6	16,207	97,244	11,669	108,913
Instructional Aides (Year 1) - FT	2	31,514	63,028	18,363	81,392
Instructional Aides (Year 2) - FT	2	30,596	61,193	18,143	79,336
			-		-
SPED Instructor (Year 1)	1	45,020	45,020	12,378	57,399
SPED Aides (Year 1) - PT	1	16,207	16,207	1,945	18,152
SPED Aides (Year 2)	1	30,596	30,596	9,072	39,668
SPED Aides (Year 4)	1	28,840	28,840	8,861	37,701
			-		-
Bus Driver - PT	3	7,200	21,600	2,592	24,192
			-		-
			-		-
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			-		-
			-		-
			-		-
<b>TOTAL</b>			1,982,906	520,330	2,503,236

**Rosa Parks: A Challenge Foundation Academy  
Budget Workbook  
Expense Assumptions**

<b>Technology - Instructional</b>		<b>Start Up</b>	<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>	<b>Year 4</b>	<b>Year 5</b>
Chromebooks	\$ 270	0	81,000	27,000	27,000	27,000	27,000
Chromebook Insurance	\$ 40	0	12,000	16,000	20,000	24,000	28,000
Infocus IN3916 Projectors	\$ 1,550	0	18,600	6,200	6,200	6,200	6,200
Staff Computers (Dell OptiPlex 90	\$ 1,565	0	21,912	6,260	6,260	6,260	6,260
Staff Keyboard and Mouse	\$ 65	0	912	260	260	260	260
Staff Monitor - 21.5"	\$ 195	0	2,732	780	780	780	780
Logitech c920 Webcams	\$ 108	0	1,296	432	432	432	432
IPEVO Document Cameras	\$ 100	0	1,200	400	400	400	400
Mimeo Smart Boards	\$ 1,500	0	18,000	6,000	6,000	6,000	6,000
Mimeo Vote Clickers	\$ 60	0	18,000	6,000	6,000	6,000	6,000
Ruckus Zone Director	\$ 2,167	0	2,167	0	0	0	0
Server Power Edge \$710	\$ 3,521	0	3,521	0	0	0	0
		<b>0</b>	<b>181,340</b>	<b>69,332</b>	<b>73,332</b>	<b>77,332</b>	<b>81,332</b>

<b>Technology - Administrative</b>		<b>Start Up</b>	<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>	<b>Year 4</b>	<b>Year 5</b>
Staff Computers (Dell OptiPlex 90	\$ 1,565	4,695	39,125	12,520	7,825	7,825	6,260
Staff Keyboard and Mouse	\$ 65	195	1,625	520	325	325	260
Staff Monitor - 21.5"	\$ 195	585	4,875	1,560	975	975	780
		<b>5,475</b>	<b>45,625</b>	<b>14,600</b>	<b>9,125</b>	<b>9,125</b>	<b>7,300</b>

Rosa Parks: A Challenge Foundation Academy  
 Budget Workbook  
 Expense Assumptions

Textbooks & Curriculum	Cost	Rental	Start Up	Year 1	Year 2	Year 3	Year 4	Year 5
Kinder Reading CK Kinder Scholastic Library	525.00	5.25	0.00	2,100.00	0.00	0.00	0.00	0.00
Kinder Reading CK Kinder Starter Kit	169.00	0.00	0.00	676.00	0.00	0.00	0.00	0.00
Kinder Reading CKLA Program (Online)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Kinder Language Read Well K Composition	599.00	0.00	0.00	2,396.00	0.00	0.00	0.00	0.00
Kinder His & Geo CK History & Geography	375.97	15.04	0.00	1,503.88	0.00	0.00	0.00	0.00
Kinder Math Earlybird Kinder Math STD ED Textbook A	23.50	11.75	0.00	2,350.00	0.00	0.00	0.00	0.00
Kinder Math Earlybird Kinder Math STD ED Activity Book A	15.30	15.30	0.00	1,530.00	1,530.00	1,530.00	1,530.00	1,530.00
Kinder Math Earlybird Kinder Math STD ED Teacher's Guide A	53.00	0.00	0.00	212.00	0.00	0.00	0.00	0.00
Kinder Math Earlybird Teacher Resource STD ED Pack A	14.00	0.00	0.00	56.00	0.00	0.00	0.00	0.00
Kinder Math Earlybird Kinder Math STD ED Textbook B	23.50	11.75	0.00	2,350.00	0.00	0.00	0.00	0.00
Kinder Math Earlybird Kinder Math STD ED Activity Book B	15.30	15.30	0.00	1,530.00	1,530.00	1,530.00	1,530.00	1,530.00
Kinder Math Earlybird Kinder Math STD ED Teacher's Guide B	53.00	0.00	0.00	212.00	0.00	0.00	0.00	0.00
Kinder Math Earlybird Teacher Resource STE ED Pack B	14.00	0.00	0.00	56.00	0.00	0.00	0.00	0.00
Kinder Math Kinder Math Readers: Per Set of 10 Books	33.00		0.00	132.00	0.00	0.00	0.00	0.00
Kinder Social Skills Stop & Think Social Skills PK-1	176.49		0.00	176.49	0.00	0.00	0.00	0.00
1st Reading Kindle - 1st	50.00	12.50	0.00	5,000.00	0.00	0.00	0.00	0.00
1st Reading CK Classroom Library - 1st	525.00	1.75	0.00	2,100.00	0.00	0.00	0.00	0.00
1st Reading CK First Grade Starter Kit	169.00		0.00	676.00	0.00	0.00	0.00	0.00
1st Reading CKLA Program (Online)	0.00		0.00	0.00	0.00	0.00	0.00	0.00
1st Writing Read Well 1 Composition Instructor Package	548.00		0.00	2,192.00	0.00	0.00	0.00	0.00
1st Grammar Read Well 1 Spelling and Writing Conventions Instr Pkg	324.00		0.00	1,296.00	0.00	0.00	0.00	0.00
1st His & Geo CK History & Geography Level 1 Student Package	75.47	6.29	0.00	754.70	0.00	0.00	0.00	0.00
1st His & Geo CK History and Geography Level 1 Teacher Package	75.47		0.00	301.88	0.00	0.00	0.00	0.00
1st Math Primary Mathematics Textbook 1A STD ED	15.30	2.25	0.00	1,530.00	1,530.00	1,530.00	1,530.00	1,530.00
1st Math Primary Mathematics Workbook 1A STD ED	15.20	13.00	0.00	1,520.00	1,520.00	1,520.00	1,520.00	1,520.00
1st Math Primary Mathematics Teacher's Guide 1A STD ED	53.00		0.00	212.00	0.00	0.00	0.00	0.00
1st Math Primary Mathematics Manipulative Kit	300.00	5.00	0.00	1,200.00	1,200.00	1,200.00	1,200.00	1,200.00
1st Math Primary Mathematics Textbook 1B STD ED	15.30	1.69	0.00	1,530.00	1,530.00	1,530.00	1,530.00	1,530.00
1st Math Primary Mathematics Workbook 1B STD ED	15.20	13.00	0.00	1,520.00	1,520.00	1,520.00	1,520.00	1,520.00
1st Math Primary Mathematics Teacher's Guide 1B STD ED	53.00		0.00	212.00	0.00	0.00	0.00	0.00
1st Math Primary Mathematics Tests 1A STD ED	17.00		0.00	68.00	0.00	0.00	0.00	0.00
1st Math Primary Mathematics Tests 1B STD ED	17.00		0.00	68.00	0.00	0.00	0.00	0.00
2nd Reading Kindle - 2nd	50.00	12.50	0.00	5,000.00	0.00	0.00	0.00	0.00
2nd Reading CK Classroom Library - 2nd	450.00	1.50	0.00	1,800.00	0.00	0.00	0.00	0.00
2nd Reading CK Starter Kit - 2nd	169.00		0.00	676.00	0.00	0.00	0.00	0.00
2nd Reading CKLA Program (Online)	0.00		0.00	0.00	0.00	0.00	0.00	0.00
2nd Writing Read Well 2 Composition Instructor Package	588.00		0.00	588.00	0.00	0.00	0.00	0.00
2nd Grammar Read Well 2 Spelling and Writing Conventions Instr Pkg	329.00		0.00	329.00	0.00	0.00	0.00	0.00
2nd His & Geo CK History & Geography Level 2 Student Package	104.47	2.90	0.00	1,044.70	0.00	0.00	0.00	0.00
2nd His & Geo CK History and Geography Level 2 Teacher Package	104.47		0.00	417.88	0.00	0.00	0.00	0.00
2nd Math Primary Mathematics Textbook 2A STD ED	16.00	2.33	0.00	1,600.00	0.00	0.00	0.00	0.00
2nd Math Primary Mathematics Workbook 2A STD ED	15.20	13.00	0.00	1,520.00	1,520.00	1,520.00	1,520.00	1,520.00
2nd Math Primary Mathematics Teacher's Guide 2A STD ED	53.00		0.00	212.00	0.00	0.00	0.00	0.00
2nd Math Primary Mathematics Manipulative Kit	300.00	5.00	0.00	1,200.00	1,200.00	1,200.00	1,200.00	1,200.00
2nd Math Primary Mathematics Textbook 2B STD ED	16.80	2.33	0.00	1,680.00	0.00	0.00	0.00	0.00
2nd Math Primary Mathematics Workbook 2B STD ED	15.20	13.00	0.00	1,520.00	1,520.00	1,520.00	1,520.00	1,520.00
2nd Math Primary Mathematics Teacher's Guide 2B STD ED	53.00		0.00	212.00	0.00	0.00	0.00	0.00
2nd Math Primary Mathematics Tests 2A STD ED	14.20		0.00	1,420.00	0.00	0.00	0.00	0.00
2nd Math Primary Mathematics Tests 2B STD ED	14.20		0.00	1,420.00	0.00	0.00	0.00	0.00
2nd Social Skills Stop & Think Social Skills 2-3 Classroom Set	176.49		0.00	176.49	0.00	0.00	0.00	0.00
3rd Writing Write Source - Grade 3 Teacher Resource Pack	242.25		0.00	969.00	0.00	0.00	0.00	0.00
3rd Writing Write Source - Grade 3 Student Book Softcover	32.00	2.67	0.00	0.00	3,200.00	0.00	0.00	0.00
3rd Reading CKLA Program (Online)	0.00		0.00	0.00	0.00	0.00	0.00	0.00
3rd Reading CK Classroom Library - 3rd Grade	600.00	2.00	0.00	0.00	2,400.00	0.00	0.00	0.00
3rd Reading CKLA Kit - 3rd	169.00		0.00	676.00	0.00	0.00	0.00	0.00
3rd Reading Write Source Reader's Handbook Student Soft - 3rd	29.10	4.85	0.00	0.00	2,910.00	0.00	0.00	0.00
3rd Reading Write Source Reader's Handbook Teachers Guide - 3rd	53.20		0.00	0.00	212.80	0.00	0.00	0.00
3rd Reading Kindle - 3rd	50.00	12.50	0.00	5,000.00	0.00	0.00	0.00	0.00
3rd Spelling Write Source Spelling for Writers Kit - 3rd	216.60	0.90	0.00	0.00	216.60	0.00	0.00	0.00
3rd His & Geo CK History and Geography - Level 3 Classroom Set	1,141.47	1.27	0.00	0.00	4,565.88	0.00	0.00	0.00
3rd Math Primary Mathematics Textbook 3A STD ED	18.40	2.33	0.00	0.00	1,840.00	0.00	0.00	0.00
3rd Math Primary Mathematics Workbook 3A STD ED	14.60	13.00	0.00	0.00	1,460.00	1,460.00	1,460.00	1,460.00
3rd Math Primary Mathematics Teacher's Guide 3A STD ED	53.00		0.00	0.00	212.00	0.00	0.00	0.00
3rd Math Primary Mathematics Manipulative Kit	300.00	5.00	0.00	0.00	1,200.00	1,200.00	1,200.00	1,200.00
3rd Math Primary Mathematics Textbook 3B STD ED	19.00	2.33	0.00	0.00	1,900.00	0.00	0.00	0.00
3rd Math Primary Mathematics Workbook 3B STD ED	14.60	13.00	0.00	0.00	1,460.00	1,460.00	1,460.00	1,460.00
3rd Math Primary Mathematics Teacher's Guide 3B STD ED	53.00		0.00	0.00	212.00	0.00	0.00	0.00
3rd Math Primary Mathematics Tests 3A STD ED	20.80		0.00	0.00	83.20	0.00	0.00	0.00
3rd Math Primary Mathematics Tests 3B STD ED	20.80		0.00	0.00	83.20	0.00	0.00	0.00
4th Writing Write Source Grade 4 Teacher Resource Pack	242.25		0.00	0.00	969.00	0.00	0.00	0.00
4th Writing Write Source Grade 4 Student Book Softcover	32.00	2.67	0.00	0.00	3,200.00	0.00	0.00	0.00
4th Reading Kindle	50.00	12.50	0.00	0.00	5,000.00	0.00	0.00	0.00
4th Reading CK - 4th Grade Starter Kit	169.00		0.00	676.00	0.00	0.00	0.00	0.00
4th Reading Write Source Reader's Handbook/Student - Gr 4	29.10	4.85	0.00	0.00	2,910.00	0.00	0.00	0.00
4th Reading Write Source Reader's Handbook/Teacher - Gr 4	53.20		0.00	0.00	212.80	0.00	0.00	0.00
4th Reading Core Knowledge Novels (Kindle Edition)	600.00	2.50	0.00	0.00	600.00	0.00	0.00	0.00
4th Reading Grace Abounding (African American Lit, Music, Art)	79.95		0.00	0.00	79.95	0.00	0.00	0.00
4th Reading Write Source Spelling for Writers Kit - 4th	216.60	0.90	0.00	0.00	216.60	0.00	0.00	0.00
4th His & Geo CK History & Geography Level 4 Classroom Set	1,327.97	1.48	0.00	0.00	5,313.88	0.00	0.00	0.00
4th Math Primary Mathematics Textbook 4A STD ED	19.00	2.33	0.00	0.00	1,900.00	0.00	0.00	0.00
4th Math Primary Mathematics Workbook 4A STD ED	14.60	13.00	0.00	0.00	1,460.00	1,460.00	1,460.00	1,460.00
4th Math Primary Mathematics Teacher's Guide 4A STD ED	53.00		0.00	0.00	212.00	0.00	0.00	0.00
4th Math Primary Mathematics Manipulative Kit	300.00	5.00	0.00	0.00	1,200.00	1,200.00	1,200.00	1,200.00
4th Math Primary Mathematics Textbook 4B STD ED	19.00	2.33	0.00	0.00	1,900.00	0.00	0.00	0.00
4th Math Primary Mathematics Workbook 4B STD ED	14.60	13.00	0.00	0.00	1,460.00	1,460.00	1,460.00	1,460.00
4th Math Primary Mathematics Teacher's Guide 4B STD ED	53.00		0.00	0.00	212.00	0.00	0.00	0.00
4th Math Primary Mathematics Tests 4A STD ED	20.80		0.00	0.00	83.20	0.00	0.00	0.00
4th Math Primary Mathematics Tests 4B STD ED	18.50		0.00	0.00	74.00	0.00	0.00	0.00
5th Writing Write Source Grade 5 Teacher Resource Pack	242.25		0.00	0.00	969.00	0.00	0.00	0.00
5th Writing Write Source Grade 5 Student Book Softcover	32.00	2.67	0.00	0.00	3,200.00	0.00	0.00	0.00
5th Reading Kindle	69.00	17.25	0.00	0.00	6,900.00	0.00	0.00	0.00
5th Reading CK - 5th Grade Starter Kit	169.00		0.00	676.00	0.00	0.00	0.00	0.00
5th Reading Write Source Reader's Handbook/Student - Gr 5	29.10	4.85	0.00	0.00	2,910.00	0.00	0.00	0.00
5th Reading Write Source Reader's Handbook/Teacher - Gr 5	53.20		0.00	0.00	212.80	0.00	0.00	0.00
5th Reading Core Knowledge Novels (Kindle Edition)	600.00	2.00	0.00	0.00	600.00	0.00	0.00	0.00
5th Reading Grace Abounding (African American Lit, Music, Art)	79.95		0.00	0.00	79.95	0.00	0.00	0.00
5th Reading Write Source Spelling for Writers Kit - 5th	216.60	0.90	0.00	0.00	216.60	0.00	0.00	0.00
5th His & Geo CK History & Geography Level 5 Classroom Set	1,508.97	1.68	0.00	0.00	6,035.88	0.00	0.00	0.00
5th Math Primary Mathematics Textbook 5A STD ED	19.00	2.33	0.00	0.00	1,900.00	0.00	0.00	0.00
5th Math Primary Mathematics Workbook 5A STD ED	14.60	13.00	0.00	0.00	1,460.00	1,460.00	1,460.00	1,460.00
5th Math Primary Mathematics Teacher's Guide 5A STD ED	53.00		0.00	0.00	212.00	0.00	0.00	0.00
5th Math Primary Mathematics Manipulative Kit	300.00	5.00	0.00	0.00	1,200.00	1,200.00	1,200.00	1,200.00
5th Math Primary Mathematics Textbook 5B STD ED	19.00	2.33	0.00	0.00	1,900.00	0.00	0.00	0.00
5th Math Primary Mathematics Workbook 5B STD ED	14.60	13.00	0.00	0.00	1,460.00	1,460.00	1,460.00	1,460.00
5th Math Primary Mathematics Teacher's Guide 5B STD ED	53.00		0.00	0.00	212.00	0.00	0.00	0.00
5th Math Primary Mathematics Tests 5A STD ED	20.80		0.00	0.00	83.20	0.00	0.00	0.00
5th Math Primary Mathematics Tests 5B STD ED	20.80		0.00	0.00	83.20	0.00	0.00	0.00
6th Writing Write Source Grade 6 Teacher Resource Pack	242.25		0.00	0.00	969.00	0.00	242.25	0.00
6th Writing Write Source Grade 6 Student Book Softcover	35.50	5.92	0.00	0.00	3,550.00	0.00	0.00	0.00
6th Reading Kindle	69.00	17.25	0.00	0.00	6,900.00	0.00	0.00	0.00
6th Reading CK - 6th Grade Starter Kit	169.00		0.00	676.00	0.00	0.00	0.00	0.00
6th Reading Write Source Reader's Handbook/Student - Gr 6	29.10	4.85	0.00	0.00	2,910.00	0.00	0.00	0.00
6th Reading Write Source Reader's Handbook/Teacher - Gr 6	60.35		0.00	0.00	241.40	0.00	0.00	0.00
6th Reading Core Knowledge Novels (Kindle Edition)	600.00	2.50	0.00	0.00	600.00	0.00	0.00	0.00
6th Reading Grace Abounding (African American Lit, Music, Art)	79.95		0.00	0.00	79.95	0.00	0.00	0.00
6th Reading Write Source Spelling for Writers Kit - 6th	216.60	0.90	0.00	0.00	216.60	0.00	866.40	0.00
6th His & Geo CK History & Geography Level 6 Classroom Set	1,381.47	1.92	0.00	0.00	5,525.88	0.00	0.00	0.00
6th Math Primary Mathematics Textbook 6A STD ED	19.00	2.33	0.00	0.00	1,900.00	0.00	0.00	0.00
6th Math Primary Mathematics Workbook 6A STD ED	14.60	13.00	0.00	0.00	1,460.00	1,460.00	1,460.00	1,460.00
6th Math Primary Mathematics Teacher's Guide 6A STD ED	53.00		0.00	0.00	212.00	0.00	0.00	0.00
6th Math Primary Mathematics Manipulative Kit	300.00	5.00	0.00	0.00	1,200.00	1,200.00	1,200.00	1,200.00
6th Math Primary Mathematics Textbook 6B STD ED	20.50	2.33	0.00	0.00	2,050.00	0.00	0.00	0.00
6th Math Primary Mathematics Workbook 6B STD ED	14.60	13.00	0.00	0.00	1,460.00	1,460.00	1,460.00	1,460.00
6th Math Primary Mathematics Teacher's Guide 6B STD ED	53.00		0.00	0.00	212.00	0.00	0.00	

Rosa Parks: A Challenge Foundation Academy

Budget Workbook

Expense Assumptions

Technology Infrastructure		Start Up	Year 1	Year 2	Year 3	Year 4	Year 5
Ceiling Mounts		3,000.00	0.00	1,000.00	1,000.00	1,000.00	1,000.00
2 POE Switches		1,374.00					
6 Access Points		3,740.00					
Wireless Installation		5,500.00					
		<b>13,614.00</b>	<b>0.00</b>	<b>1,000.00</b>	<b>1,000.00</b>	<b>1,000.00</b>	<b>1,000.00</b>
<b>Furniture</b>							
Teacher's Desk	\$ 500	6,000.00		2,000.00	2,000.00	2,000.00	2,000.00
Teacher's Chair	\$ 100	1,200.00		400.00	400.00	400.00	400.00
Student Desk	\$ 110	33,000.00		11,000.00	11,000.00	11,000.00	11,000.00
Student Chair	\$ 65	19,500.00		6,500.00	6,500.00	6,500.00	6,500.00
Student Table	\$ 230	2,760.00		920.00	920.00	920.00	920.00
Computer Table	\$ 250	0.00		0.00	0.00	0.00	0.00
Computer Chair	\$ 100	0.00		0.00	0.00	0.00	0.00
Projector Screen	\$ 75	0.00		0.00	0.00	0.00	0.00
Whiteboard	\$ 400	0.00		0.00	0.00	0.00	0.00
Bookshelves	\$ 250	3,000.00		1,000.00	1,000.00	1,000.00	1,000.00
File Cabinet	\$ 250	3,000.00		1,000.00	1,000.00	1,000.00	1,000.00
Office File Cabinet	\$ 425	425.00		0.00	0.00	0.00	0.00
Principal File	\$ 550	550.00		0.00	0.00	0.00	0.00
Conference Room Table	\$ 1,500	1,500.00		0.00	0.00	0.00	0.00
Conference Room Chairs	\$ 200	2,400.00		0.00	0.00	0.00	0.00
Podium	\$ 800	800.00		0.00	0.00	0.00	0.00
Cafeteria Table	\$ 1,300	0.00	10,829.00	3,611.11	3,611.11	0.00	0.00
Office Message Board	\$ 600	600.00		0.00	0.00	0.00	0.00
Folding Chairs	\$ 22	0.00	6,600.00	0.00	0.00	0.00	0.00
Folding Tables	\$ 70	0.00	2,625.00	0.00	0.00	0.00	0.00
Mobile Computer Cart	\$ 500	0.00	6,000.00	0.00	0.00	0.00	0.00
Teacher Mailboxes	\$ 150	0.00	150.00	0.00	0.00	0.00	0.00
Reception Furniture	\$ 2,300	0.00	2,300.00	0.00	0.00	0.00	0.00
Reception Desk	\$ 2,000	0.00	2,000.00	0.00	0.00	0.00	0.00
Principal Desk	\$ 1,100	1,100.00		0.00	0.00	0.00	0.00
Principal Bookshelf	\$ 650	650.00		0.00	0.00	0.00	0.00
Principal Chair	\$ 200	200.00		0.00	0.00	0.00	0.00
Storage Cabinets	\$ 340	0.00		0.00	0.00	0.00	0.00
Lounge Furniture	\$ 1,500	0.00	6,000.00	0.00	0.00	0.00	0.00
Lounge Tables	\$ 150	0.00	450.00	150.00	150.00	150.00	150.00
Lounge Chairs	\$ 50	0.00	600.00	200.00	200.00	200.00	200.00
		<b>76,685.00</b>	<b>37,554.00</b>	<b>26,781.11</b>	<b>26,781.11</b>	<b>23,170.00</b>	<b>23,170.00</b>



Rosa Parks: A Challenge Foundation Academy

Budget Workbook

Expense Assumptions

Student Transportation		Start Up	Year 1	Year 2	Year 3	Year 4	Year 5
Used Bus	\$ 20,000	0.00	60,000.00	0.00	0.00	0.00	0.00
Insurance	\$ 500	0.00	500.00	500.00	500.00	500.00	500.00
Maintenance & Repair	\$ 2,500	0.00	7,500.00	7,500.00	7,500.00	7,500.00	7,500.00
Fuel (5 gal x 180 days x \$3 per gal))	\$ 2,700	0.00	8,100.00	8,100.00	8,100.00	8,100.00	8,100.00
		<b>0.00</b>	<b>76,100.00</b>	<b>16,100.00</b>	<b>16,100.00</b>	<b>16,100.00</b>	<b>16,100.00</b>

Attachment 20  
Budget Narrative  
Rosa Parks: A Challenge Foundation Academy

#### Revenues

Revenues are based on conservative estimates.

- Basic Tuition is based on an estimate of \$6,950 per pupil for each year. This is conservative compared to other schools in the area.
- Public Law 101-476 IDEA (federal Special Ed), Title I, and Title II are all conservative estimates based on area schools of similar size. It is reasonable to assume an increase in allocations each year as enrollment grows.
- Federal Lunch Program estimates assume that the school will participate in the Community Eligibility Program that will provide federal funds for the entire student population. If for some reason the school does not qualify, non-free/reduced students will be charged a lunch fee that will make up the difference in revenue. Lunch revenues are equal to the Food Service expense that is projected. The program will operate at break even.
- TeamCFA has committed to provide a forgivable loan of \$300,000 over a period of 3 years to assist with expenses such as implementation of Core Knowledge curriculum.
- The school will apply for the Charter School Advance Program in Year 1 in order to provide additional cash that would have previously been provided through the federal Public Charter School Program (PCSP) funds. These funds are available at 4% interest and will be paid back over a period of 10 years beginning in Year 2.
- We have not included any Charter School Grant Program funds that are anticipated to be available to all new charter school in the first two years of operation and upon meeting the requirements thereafter. It is our hope that the State of Indiana is committed to continue providing this funding to charter schools, however as a new line item during the past state budget cycle, we want to be certain that this funding continues to be available before counting on it.
- TeamCFA will provide a low-cost loan of \$110K to the school during startup in order to help support cash flow. This loan will be paid back (with interest) over a 3 year period.
- The school also plans to apply for funding from the Walton Family Foundation. We have initiated contact with Foundation, however no commitment has been made at this time. Therefore we have not included these funds in the budget.

#### Staffing Expenditures

Student enrollment for Year 1 will start at 300 students and increase by 100 students each year as grade levels are added with a maximum of 700 students in Year 5.

Administrative staff will consist of a School Director, Dean of Students, Social Worker and Administrative Assistant. Additional administrative support is added in Years 2 and 3.

Instructional staff will consist of 1 certified teacher for each classroom of 25 students, plus a Music/Art instructor and PE instructor. There will be 2-4 Instructional Aides plus 6 part-time Instructional Aides that will be shared among the classrooms.

There will also be a Special Education teacher plus a full-time aide and part-time aide. An additional full-time aide will be added in Year 4.

Wages are consistent with administrative/teacher salaries in the area. Pay increases are calculated at 3% each year. Payroll taxes are calculated at 8% of wages, retirement is calculated at 7.5% of wages for certified staff enrolled in the Indiana State Teachers Retirement Fund and 4% for staff that opt-in to a 403B plan. Health insurance expenses are calculated at \$4,800 per employee in Year 1 with a 3% increase in expense each future year. A bonus pool of 4% of wages is included each year.

#### Supplies and Equipment

The budget provides for staff computers plus a Chromebook for each student. Each class will also be outfitted with a Mimeo smart board and document cameras to enhance delivery of the curriculum.

Curriculum includes Core Knowledge History and Geography texts, Core Knowledge Language Arts and Singapore Math for each grade level.

Classroom supplies are budgeted at \$5,000 per grade level which is consistent with expenditures incurred by other schools in the Team CFA network.

Anticipated software needs include NWEA, Compass/Odyssey and other instructional and administrative products.

#### Professional Services

Professional services are based on expense incurred by similarly sized schools in the Team CFA network.

INSchool fees are still under negotiation, but amounts listed are reasonable estimates based on current discussions. Support services will include accounting, state reporting and compliance, special education admin services and data analysis and performance.

Audit fees are consistent with other local schools.

#### Facilities

Facilities cost including Rent, Utilities, Repair & Maintenance, and Custodial Services are based on expense incurred by similarly sized schools in the Team CFA network.

#### Other Expenses

ICSB Administrative fees are calculated at 3% of state funding.

#### Contingency Plan

In the event that revenue allocations are less than projected, the School Director along with the Board of Directors will determine whether it would be reasonable to pursue additional funding from the Charter School Advance Program or whether it would be more prudent to cut expenses

and potentially eliminate staffing positions. It will depend on the amount of the funding gap and whether the situation is temporary or more long-term.

Sufficient funds to cover all anticipated expenses

The budget reflects that TeamCFA is committed to providing the startup capital needed to provide cash flow until state revenues are received in July 2017. We will be good stewards of those funds, making only those purchases that are most critical during the startup period.

In addition we have done our best to identify what the school will need to provide in terms of sufficient special education services and transportation to those students who need it. In the event our needs are greater than we anticipated, we will re-evaluate our budget and determine where cuts can be made in order to provide sufficient services in these areas.

In regards to retirement contributions, we have budgeted appropriately for Teacher Retirement Fund contributions as well as providing retirement benefits for those employees not eligible for TRF or that opt-out of TRF.

School Name	Year Opened	Location	Contact Information for Authorizer	Contact Information for School	Year School Joined Network	Number of Students and Grade Levels Served	Free/Reduced Lunch Status	Race/Ethnicity	Special Education	English Language Learners	State Assessment Results	Growth Results NWEA MAP
Aristotle Preparatory Academy-A Challenge Foundation Academy	2013	2461 Arty Ave Charlotte, NC 28208	NC Board of Education 301 N. Wilmington St Room 212 6302 Mail Service Center Raleigh, NC 27699-6302	David Davis, Director 704-215-4550	2013	140 K-5 students served	85.70%	White: 1%	Students with IEPs:26	Number of students tested for ELL services:	2014-2015 Grade 3 Math:38.6% Grade 3 Reading:33.3% Grade 4 Math:29.4% Grade 4 Reading:52.9% Grade 5 Math: N/A Grade 5 Reading: N/A Grade 6 Math: N/A Grade 6 Reading: N/A Grade 7 Math: N/A Grade 7 Reading: N/A Grade 8 Math: N/A Grade 8 Reading: N/A	2014-2015 School-Wide Math:68% Reading: 68%
								African-American: 98%	Students provided with OT:3	Number of students who were provided ELL services:	2013-2014 Grade 3 Math:56% Grade 3 Reading:33% Grade 4 Math: N/A Grade 4 Reading:N/A Grade 5 Math:N/A Grade 5 Reading:N/A Grade 6 Math: N/A Grade 6 Reading:N/A Grade 7 Math:N/A Grade 7 Reading:N/A Grade 8 Math:N/A Grade 8 Reading:N/A	2013-2014 School-Wide Math:35.5% Reading:30.5%
								Hispanic/Latino: 0%	Students Provided with PT:0			
								Asian: 0%	Students provided with Speech Therapy:7			
								Native American:0%				
								Pacific Islander:0%				
								Two or More Races: 1%				

School Name	Year Opened	Location	Contact Information for Authorizer	Contact Information for School	Year School Joined Network	Number of Students and Grade Levels Served	Free/Reduced Lunch Status	Race/Ethnicity	Special Education	English Language Learners	State Assessment Results	Growth Results NWEA MAP	Graduation Rate (High School Only)
Brevard Academy- A Challenge Foundation Academy	1997	28712	299 Andante Lane Brevard, NC 27699-6302	Barbara Grimm, Director 828-885-2665	2010	290 students served in grade K-8	Number of collected forms:253	White: 90%	Students with IEPs:26	Number of students tested for ELL services:0	2014-2015 Grade 3 Math: 76.9% Grade 3 Reading:88.5% Grade 4 Math: 78.6% Grade 4 Reading:75.0% Grade 5 Math:39.1% Grade 5 Reading:65.2% Grade 6 Math:61.9% Grade 6 Reading:90.5% Grade 7 Math: 68% Grade 7 Reading: 92% Grade 8 Math: 75% Grade 8 Reading: 75%	2014-2015 School-Wide Math:69% Reading: 66%	
							Number of students eligible:133	African-American: 5%	Students provided with OT:8	Number of students who were provided ELL services:0	2013-2014 Grade 3 Math:85.7% Grade 3 Reading:85.7% Grade 4 Math:50% Grade 4 Reading:50% Grade 5 Math:76.2% Grade 5 Reading:71.4% Grade 6 Math:54.2% Grade 6 Reading:91.7% Grade 7 Math:33.3% Grade 7 Reading:59.3% Grade 8 Math:31.3% Grade 8 Reading:87.5%	2013-2014 School-Wide Math:74.2% Reading:70.2%	
								Hispanic/Latino: 5%	Students Provided with PT:2		2012-2013 Grade 3 Math:39.1% Grade 3 Reading:43.5% Grade 4 Math:26.1% Grade 4 Reading:39.1% Grade 5 Math:43.5% Grade 5 Reading:65.2% Grade 6 Math:33.3% Grade 6 Reading:33.3% Grade 7 Math:16.7% Grade 7 Reading:55.6% Grade 8 Math:42.9% Grade 8 Reading:28.6%	2012-2013 School-Wide Math:45.6% Reading: 62.8%	
								Asian: 0%	Students provided with Speech Therapy:15		2011-2012 Grade 3 Math:95% Grade 3 Reading:84.2% Grade 4 Math:89.5% Grade 4 Reading:89.5% Grade 5 Math:78.6% Grade 5 Reading:78.6% Grade 6 Math:95% Grade 6 Reading:94.2% Grade 7 Math:88.9% Grade 7 Reading:88.9% Grade 8 Math:95% Grade 8 Reading:78.6%	2011-2012 School-Wide Math:54.3% Reading: 64.8%	
								Native American:0%			2010-2011 Grade 3 Math:94.4% Grade 3 Reading: 95% Grade 4 Math:78.6% Grade 4 Reading:71.4% Grade 5 Math:95% Grade 5 Reading:93.8% Grade 6 Math:95% Grade 6 Reading:95% Grade 7 Math:95% Grade 7 Reading:81.3% Grade 8 Math:84.6% Grade 8 Reading:92.3%	2010-2011 School-Wide Math:23.4% Reading: 35.8%	
								Pacific Islander:0%					
								Two or More Races: 1%					

School Name	Year Opened	Location	Contact Information for Authorizer	Contact Information for School	Year School Joined Network	Number of Students and Grade Levels Served	Free/Reduced Lunch Status	Race/Ethnicity	Special Education	English Language Learners	State Assessment Results	Growth Results NWEA MAP	Graduation Rate (High School Only)												
Cornerstone Charter Academy- A Challenge Foundation Academy	2012	27455	NC Board of Education 301 N. Wilmington St Room 212 6302 Mail Service Center Raleigh, NC 27699-6302	Joe Caraher, Director 336-482-3855	2012	9	812 students served in grade K-45	Number of collected forms: 45	White: 77.8%	Students with IEPs: 95	Number of students tested for ELL services: 5	2014-2015 Grade 3 Math: 59.5 Grade 3 Reading: 63.3 Grade 4 Math: 67.9 Grade 4 Reading: 67.9 Grade 5 Math: 65.4 Grade 5 Reading: 67.9 Grade 6 Math: 42 Grade 6 Reading: 72.8 Grade 7 Math: 72.5 Grade 7 Reading: 86.3 Grade 8 Math: 52.5 Grade 8 Reading: 73.8	2014-2015 School-Wide Math: 69% Reading: 55%												
												Number of students eligible: 37			African-American: 10.5%	Students provided with OT: 13	Number of students who were provided ELL services: 0	2013-2014 Grade 3 Math: 63.2 Grade 3 Reading: 64.5 Grade 4 Math: 43.8 Grade 4 Reading: 46.6 Grade 5 Math: 53.2 Grade 5 Reading: 49.4 Grade 6 Math: 58 Grade 6 Reading: 67.9 Grade 7 Math: 64.4 Grade 7 Reading: 75.5 Grade 8 Math: N/A Grade 8 Reading: N/A	2013-2014 School-Wide Math: 68.7% Reading: 65.3%						
																		Hispanic/Latino: 4%		Students Provided with PT: 0	2012-2013 Grade 3 Math: 76.5 Grade 3 Reading: 74.1 Grade 4 Math: 59.3 Grade 4 Reading: 70.4 Grade 5 Math: 48.1 Grade 5 Reading: 59.3 Grade 6 Math: 62.2 Grade 6 Reading: 73.4 Grade 7 Math: N/A Grade 7 Reading: N/A Grade 8 Math: N/A Grade 8 Reading: N/A	2012-2013 School-Wide Math: 55.7% Reading: 50.2%			
																							Asian: 2.8%	Students provided with Speech Therapy: 25	Native American: 0%

School Name	Year Opened	Location	Contact Information for Authorizer	Contact Information for School	Year School Joined Network	Number of Students and Grade Levels Served	Free/Reduced Lunch Status	Race/Ethnicity	Special Education	English Language Learners	State Assessment Results	Growth Results NWEA
Ethos Academy-A Challenge Foundation Academy	2015	7614 N 43rd Ave Glendale, AZ 85086	Arizona State Board of Charter Schools 1616 West Adams St Suite 170 Phoenix, AZ 85007	Tim Boykin, Director 623-640-9326	2014	89 students served in grades K-3	83 forms accepted	White: 30%	Students with IEPs: 8	Number of students tested for ELL services: 20	N/A	N/A
								African-American: 30%	Students provided with OT: 5	Number of students who were provided ELL services: 15		
								Hispanic/Latino: 40%	Students Provided with PT: 0			
								Asian: 0%	Students provided with Speech Therapy: 6			
								Native American: 0%				
Pacific Islander: 0%												
Two or More Races: 0%												



School Name	Year Opened	Location	Contact Information for Authorizer	Contact Information for School	Year School Joined Network	Number of Students and Grade Levels Served	Free/Reduced Lunch Status	Race/Ethnicity	Special Education	English Language Learners	State Assessment Results	Growth Results NWEA	Graduation Rate (High School Only)
Excelsior Classical Academy-A Challenge Foundation Academy	2015	27704 4100 N Roxboro Durham, NC	NC Board of Education 301 N. Wilmington St Room 212 6302 Mail Service Center Raleigh, NC 27699-6302	Cynthia Gadol, Director 919-213-8585	2013	4 250 students served in grade K-	Number of collected forms: 55 Number of students eligible: 45	White: 59% African-American: 24% Hispanic/Latino: 6% Asian: 1% Native American: 1% Pacific Islander: 0% Two or More Races: 6%	Students with IEPs: 25 Students provided with OT: 7 Students Provided with PT: 0 Students provided with Speech Therapy: 14	Number of students tested for ELL services: 10 Number of students who were provided ELL services: 9	N/A	N/A	

School Name	Year Opened	Location	Contact Information for Authorizer	Contact Information for School	Year School Joined Network	Number of Students and Grade Levels Served	Free/Reduced Lunch Status	Race/Ethnicity	Special Education	English Language Learners	State Assessment Results	Growth Results MAP	NWEA	Graduation Rate (High School Only)				
Hirsch Academy-A Challenge Foundation Academy	2013	85251	6535 E. Osborn Rd Suite 401 Scottsdale, AZ	Arizona State Board for Charter Schools 1616 West Adams St Suite 170 Phoenix, AZ 85007	2012	5	180 students served in grade K-5	99% FRL; collected from every student	White: 2%	Students with IEPs: 24	Number of students tested for ELL services: 100	2014-2015 Grade 3 Math: 52% Grade 3 Reading: 17% Grade 4 Math: 24% Grade 4 Reading: 24% Grade 5 Math: N/A Grade 5 Reading: N/A Grade 6 Math: N/A Grade 6 Reading: N/A Grade 7 Math: N/A Grade 7 Reading: N/A Grade 8 Math: N/A Grade 8 Reading: N/A Grade 9 Reading: N/A	2014-2015 School-Wide Math: 97% Reading: 86%					
															African-American: 3.5%	Students provided with OT: 0	2013-2014 Grade 3 Math: 15% Grade 3 Reading: 31% Grade 4 Math: N/A Grade 4 Reading: N/A Grade 5 Math: N/A Grade 5 Reading: N/A Grade 6 Math: N/A Grade 6 Reading: N/A Grade 7 Math: N/A Grade 7 Reading: N/A Grade 8 Math: N/A Grade 8 Reading: N/A	2013-2014 School-Wide Math: 76.3% Reading: 75%
															Hispanic/Latino: 93.5%	Students provided with PT: 0		
															Asian: 1% Native American: 0%	Students provided with Speech Therapy: 15		
Pacific Islander: 0% Two or More Races: 0%																		

School Name	Year Opened	Location	Contact Information for Authorizer	Contact Information for School	Year School Joined Network	Number of Students and Grade Levels Served	Free/Reduced Lunch Status	Race/Ethnicity	Special Education	English Language Learners	State Assessment Results	Growth Results NWEA MAP	Graduation Rate (High School Only)
Indianapolis Academy of Excellence-A Challenge Foundation Academy	2014	1145 E 22nd St Indianapolis, IN 46202	Indiana State Charter Board	Tara Gustin, Director 317-653-4009	2013	89 students served in grade K-4	Number of collected forms:	White: 1%	Students with IEPs: 7	Number of students tested for ELL services:	2014-2015 Grade 3 Math: 0% Grade 3 Reading: 15% Grade 4 Math: Grade 4 Reading: Grade 5 Math: Grade 5 Reading: Grade 6 Math: Grade 6 Reading: Grade 7 Math: Grade 7 Reading: Grade 8 Math: Grade 8 Reading:	2014-2015 School-Wide Math:67% Reading: 37%	
							Number of students eligible: 100%- We are currently receiving 100% free breakfast and lunch under the CEP program.	African-American: 90%	Students provided with OT: 2	Number of students who were provided ELL services: 0	lread- 47%		
								Hispanic/Latino: 5%	Students Provided with PT: 0				
								Asian: 0% Native American:0%	Students provided with Speech Therapy: 4				
								Pacific Islander:0% Two or More Races: 4%					

School Name	Year Opened	Location	Contact Information for Authorizer	Contact Information for School	Year School Joined Network	Number of Students and Grade Levels Served	Free/Reduced Lunch Status	Race/Ethnicity	Special Education	English Language Learners	State Assessment Results	Growth Results NWEA MAP	Graduation Rate (High School Only)
Lake Lure Classical Academy-A Challenge Foundation Academy	2009	1058 Island Creek Rd Lake Lure, NC 28746	NC Board of Education 301 N. Wilmington St Room 212 6302 Mail Service Center Raleigh, NC 27699-6302	Jessica Boland, Director 828-625-9292	2008	429 students served in grades K-12	Number of collected forms:135	White: 91%	Students with IEPs:63	Number of students tested for ELL services:1	2014-15 Grade 3 Math: 68% Grade 3 Reading:68% Grade 4 Math:46% Grade 4 Reading:54% Grade 5 Math:32% Grade 5 Reading: 65% Grade 6 Math: 42% Grade 6 Reading: 74% Grade 7 Math:36% Grade 7 Reading: 36% Grade 8 Math: 16% Grade 8 Reading:58%	2014-2015 School-Wide Math:75% Reading:56%	
							Number of students eligible:112	African-American: 1%	Students provided with OT: 3	Number of students who were provided ELL services: 1	2013-14 Grade 3 Math: 56% Grade 3 Reading:72% Grade 4 Math: 58% Grade 4 Reading: 77% Grade 5 Math: 47% Grade 5 Reading: 76% Grade 6 Math: 36% Grade 6 Reading: 81% Grade 7 Math: 22% Grade 7 Reading: 61% Grade 8 Math: 50% Grade 8 Reading: 70%	2013-2014 School-Wide Math:49.7% Reading: 65.4%	
								Hispanic/Latino: 1%	Students Provided with PT:0		2012-2013 Grade 3 Math: 58% Grade 3 Reading:63% Grade 4 Math:58% Grade 4 Reading:62.5% Grade 5 Math: 48% Grade 5 Reading:56% Grade 6 Math: 38% Grade 6 Reading:55% Grade 7 Math:17.9% Grade 7 Reading: 57% Grade 8 Math: 48% Grade 8 Reading:72%	2012-2013 School-Wide Math:50.4% Reading:44.9%	
								Asian: 2%	Students provided with Speech Therapy: 18		2011-2012 Grade 3 Math: 88% Grade 3 Reading: 69% Grade 4 Math: 95% Grade 4 Reading: 91% Grade 5 Math: 79% Grade 5 Reading: 62% Grade 6 Math: 91% Grade 6 Reading: 82% Grade 7 Math: 84% Grade 7 Reading: 72% Grade 8 Math: 9% Grade 8 Reading: 93%	2011-2012 School-Wide Math:37.8% Reading: 46.4%	
								Native American:0%			2010-2011 Grade 3 Math:70% Grade 3 Reading:70% Grade 4 Math:80% Grade 4 Reading:75% Grade 5 Math:77.8% Grade 5 Reading:66.7% Grade 6 Math:87.5% Grade 6 Reading:91.7% Grade 7 Math: 94.7% Grade 7 Reading:94.7% Grade 8 Math: N/A Grade 8 Reading:N/A	2010-2011 NWEA MAP Data Available	No
								Pacific Islander:0%					
								Two or More Races: 5%					

School Name	Year Opened	Location	Contact Information for Authorizer	Contact Information for School	Year School Joined Network	Number of Students and Grade Levels Served	Free/Reduced Lunch Status	Race/Ethnicity	Special Education	English Language Learners	State Assessment Results	Growth Results NWEA MAP	Graduation Rate (High School Only)						
New Dimensions School-A Challenge Foundation Academy	2003	28655	550 Lenoir Rd Morganton, NC 27699-6302	NC Board of Education 301 N. Wilmington St Room 212 6302 Mail Service Center Raleigh, NC 27699-6302	Larry Wilkerson, Director 828-437-5753	2011	8	276 students served in grade K-8	Number of forms collected:204	White: 89%	Students with IEPs:28	Number of students tested for ELL services:2	2014-2015 Grade 3 Math: 77.5% Grade 3 Reading:72.5% Grade 4 Math:75% Grade 4 Reading:80% Grade 5 Math:56.3% Grade 5 Reading:37.5% Grade 6 Math:36.4% Grade 6 Reading:81.8% Grade 7 Math:25% Grade 7 Reading:55% Grade 8 Math:25% Grade 8 Reading:58.3%	2014-2015 School-Wide Math:74% Reading: 61%					
													Number of students eligible: 114		African-American: 5%	Students provided with OT:9	Number of students provided ELL services:2	2013-2014 Grade 3 Math: 53% Grade 3 Reading: 64% Grade 4 Math: 40% Grade 4 Reading: 53% Grade 5 Math: 66% Grade 5 Reading: 82% Grade 6 Math: 19% Grade 6 Reading: 66% Grade 7 Math: 33% Grade 7 Reading: 66% Grade 8 Math: 34% Grade 8 Reading: 58%	2013-2014 School-Wide Math:64.7% Reading: 55%
													Hispanic/Latino: 4%		Students Provided with PT:2	2012-2013 Grade 3 Math: 36% Grade 3 Reading: 43% Grade 4 Math: 59% Grade 4 Reading: 68% Grade 5 Math: 57% Grade 5 Reading:57% Grade 6 Math: 27% Grade 6 Reading: 47% Grade 7 Math: 45% Grade 7 Reading: 70%	2012-2013 School-Wide Math:57.3% Reading:48.9%		
													Asian: 2%		Students Provided with Speech Therapy:11	2011-2012 Grade 3 Math: 90% Grade 3 Reading 95% Grade 4 Math: 94% Grade 4 Reading: 94% Grade 5 Math: 82% Grade 5 Reading: 82% Grade 6 Math: 100% Grade 6 Reading: 88%		2011-2012 NWEA Data Available No	
													Native American:0%						
Pacific Islander:0%																			
Two or More Races: 0%																			



School Name	Year Opened	Location	Contact Information for Authorizer	Contact Information for School	Year School Joined Network	Number of Students and Grade Levels Served	Free/Reduced Lunch Status	Race/Ethnicity	Special Education	English Language Learners	State Assessment Results	Growth Results NWEA MAP	Graduation Rate (High School Only)
Pioneer Preparatory School-A Challenge Foundation Academy	2009	6510 Clarendon Ave Phoenix, AZ 85033	Arizona State Board for Charter Schools 1616 West Adams St Suite 170 Phoenix, AZ 85007	Tony Best, Director 623-933-3733	2009	629 students served in grades K-6	96%	White: 1%	Students with IEPs: 54 have an IEP and 7 have 504s	Number of students tested for ELL services: 142	2014-2015 Grade 3 Math: 21% Grade 3 Reading: 30% Grade 4 Math: 32% Grade 4 Reading: 29% Grade 5 Math: 22% Grade 5 Reading: 14% Grade 6 Math: 13% Grade 6 Reading: 14%	2014-2015 School-Wide Math: 73% Reading: 66%	
								African-American: 3%	Students provided with OT: 2	Number of students who were provided ELL services: 142	2013-2014 Grade 3 Math: 83% Grade 3 Reading: 83% Grade 4 Math: 52% Grade 4 Reading: 63% Grade 5 Math: 59% Grade 5 Reading: 79% Grade 6 Math: 73% Grade 6 Reading: 86%	2013-2014 School-Wide Math: 59.6% Reading: 56.3%	
								Hispanic/Latino: 96%	Students Provided with PT: 0		2012-2013 Grade 3 Math: 68% Grade 3 Reading: 74% Grade 4 Math: 65% Grade 4 Reading: 65% Grade 5 Math: 75% Grade 5 Reading: 79% Grade 6 Math: 51% Grade 6 Reading: 59%	2012-2013 School-Wide Math: 66.6% Reading: 59.1%	
								Asian: 0%	Students provided with Speech Therapy: 44		2011-2012 Grade 3 Math: 70% Grade 3 Reading: 70% Grade 4 Math: 57% Grade 4 Reading: 68% Grade 5 Math: 45% Grade 5 Reading: 57% Grade 6 Math: 71% Grade 6 Reading: 88%	2011-2012 School-Wide Math: 49% Reading: 53.2%	
								Native American: 0%			2010-2011 Grade 3 Math: 50% Grade 3 Reading: 60% Grade 4 Math: 31% Grade 4 Reading: 52% Grade 5 Math: 28% Grade 5 Reading: 75% Grade 6 Math: 38% Grade 6 Reading: 74% Grade 7 Math: 45% Grade 7 Reading: 79% Grade 8 Math: 18% Grade 8 Reading: 29%	2010-2011 School-Wide Math: 27.1% Reading: 47.1	
							Pacific Islander: 0%						
								Two or More Races: 0%					

School Name	Year Opened	Location	Contact Information for Authorizer	Contact Information for School	Year School Joined Network	Number of Students and Grade Levels Served	Free/Reduced Lunch Status	Race/Ethnicity	Special Education	English Language Learners	State Assessment Results	Growth Results NWEA MAP	Graduation Rate (High School Only)
Shining Rock Classical Academy-A Challenge Foundation Academy	2015	NC 28745 21 Shackford Hall Drive Lake Junaluska,	NC Board of Education 301 N. Wilmington St Room 212 6302 Mail Service Center Raleigh, NC 27699-6302	Ben Butler, Director 828-738-2665	2014	250 students served in grades K-6	Number of collected forms:0	White: 97%	Students with IEPs:23	Number of students tested for ELL services:0	N/A	N/A	
							Number of students eligible:0	African-American: 3%	Students provided with OT:0	Number of students who were provided ELL services:0			
								Hispanic/Latino: 0	Students Provided with PT:0				
								Asian: 0	Students provided with Speech Therapy:5				
								Native American: Pacific Islander: Two or More Races:					



School Name	Year Opened	Location	Contact Information for Authorizer	Contact Information for School	Year School Joined Network	Number of Students and Grade Levels Served	Free/Reduced Lunch Status	Race/Ethnicity	Special Education	English Language Learners	State Assessment Results	Growth Results NWEA MAP	Graduation Rate (High School Only)
Thomas Jefferson Classical Academy- A Challenge Foundation Academy	1999	2527 US221A Hwy Mooresboro, NC 28114	NC Board of Education 301 N. Wilmington St Room 212 6302 Mail Service Center Raleigh, NC 27699-6302	Joe Maimone, Head Master 828-657-9998	2006	1300 students served in grade K-12	Number of collected forms: 240	White: 78%	Students with IEPs: 60	Number of students tested for ELL services: 12	2014-2015 Grade 3 Math:88.1% Grade 3 Reading:89.1% Grade 4 Math:88.9% Grade 4 Reading:87.9% Grade 5 Math:80% Grade 5 Reading:83.2% Grade 6 Math:80.4% Grade 6 Reading:88.7% Grade 7 Math:75.5% Grade 7 Reading:83% Grade 8 Math:61.7% Grade 8 Reading:84%	2014-2015 School-Wide Reading:67% Math:78%	95%
							Number of students eligible: 120	African-American: 8%	Students provided with OT: 9	Number of students who were provided ELL services: 10	2013-2014 Grade 3 Math:82.2% Grade 3 Reading:89.1% Grade 4 Math:88.7% Grade 4 Reading:89.6% Grade 5 Math:86.6% Grade 5 Reading:85.6% Grade 6 Math:55.2% Grade 6 Reading:81.3% Grade 7 Math:77.2% Grade 7 Reading:88.0% Grade 8 Math:72.2% Grade 8 Reading:88.7%	2013-2014 School-Wide Reading:70.2% Math:82.3%	
								Hispanic/Latino: 7%	Students Provided with PT: 0		2012-2013 Grade 3 Math:63.7% Grade 3 Reading:85.7% Grade 4 Math:72.2% Grade 4 Reading:84.4% Grade 5 Math:47.9% Grade 5 Reading:61.5% Grade 6 Math:46.2% Grade 6 Reading:74.2% Grade 7 Math:69.8% Grade 7 Reading:79.2% Grade 8 Math:73.9% Grade 8 Reading:67.4%	2012-2013 School-Wide Reading:62.8% Math:75.1%	
								Asian: 2%	Students provided with Speech Therapy: 13		2011-2012 Grade 3 Math:95% Grade 3 Reading:95% Grade 4 Math:95% Grade 4 Reading:93.7% Grade 5 Math:91.5% Grade 5 Reading:88.3% Grade 6 Math:94.8% Grade 6 Reading:95% Grade 7 Math:95% Grade 7 Reading:91.2% Grade 8 Math:95% Grade 8 Reading:95%	2011-2012 School-Wide Reading:64.8% Math:68.7%	
								Native American:0%			2010-2011 Grade 3 Math:95% Grade 3 Reading:87.5% Grade 4 Math:95% Grade 4 Reading:91.1% Grade 5 Math:92.1% Grade 5 Reading:83.1% Grade 6 Math:95% Grade 6 Reading:95% Grade 7 Math:95% Grade 7 Reading:95% Grade 8 Math:95% Grade 8 Reading:95%	2010-2011 School-Wide Reading:67.3% Math:60.2%	
								Pacific Islander:0%					
								Two or More Races: 5%					

School Name	Year Opened	Location	Contact Information for Authorizer	Contact Information for School	Year School Joined Network	Number of Students and Grade Levels Served	Free/Reduced Lunch Status	Race/Ethnicity	Special Education	English Language Learners	State Assessment Results	Growth Results NWEA	Graduation Rate (High School Only)	
VERITAS Community School-A Challenge Foundation Academy	2015	28204	600 Seigle Ave Charlotte, NC 27699-6302	NC Board of Education 301 N. Wilmington St Room 212 6302 Mail Service Center Raleigh, NC 27699-6302	Katy Ridnouer, Head of School 980-333-1939	2015	3	130 students served in grades K-3	Number of collected forms: 35	White: 51%	Students with IEPs: 3	Number of students tested for ELL services: 3	N/A	N/A
								Number of students eligible: 31	African-American: 32%	Students provided with OT: 1	Number of students who were provided ELL services: 2			
								Hispanic/Latino: 6%	Students Provided with PT: 0					
								Asian: 1%	Students provided with Speech Therapy: 2					
								Native American: 0%						
								Pacific Islander: 1%						
								Two or More Races: 9%						

School Name	Year Opened	Location	Contact Information for Authorizer	Contact Information for School	Year School Joined Network	Number of Students and Grade Levels Served	Free/Reduced Lunch Status	Race/Ethnicity	Special Education	English Language Learners	State Assessment Results	Growth Results NWEA	Graduation Rate (High School Only)
Western School of Science and Technology-A Challenge Foundation Academy	2014	Phoenix, AZ 85033	Arizona State Board for Charter Schools 1616 West Adams St Suite 170 Phoenix, AZ 85007	Peter Boyle, Director 249-3900 623	2013	380 students served in grades 7-10	97%	White: 1%	Students with IEPs: 42	Number of students tested for ELL services: 19	2014-2015 Grade 7 Math: 21% Grade 7 Reading: 21% Grade 8 Math: 11% Grade 8 Reading: 20%	2014-2015 School-Wide Math: 64% Reading: 68%	
								African-American: 1%	Students provided with OT: 0				
								Hispanic/Latino: 98%	Students Provided with PT: 0				
								Asian: 0%	Students provided with Speech Therapy: 8				
								Native American: 0%					
Pacific Islander: 0%													
								Two or More Races: 0%					

**INDIANAPOLIS ACADEMY OF EXCELLENCE, INC.**

*Financial Statements*

*June 30, 2015*



INDIANAPOLIS ACADEMY OF EXCELLENCE, INC.

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## INDEPENDENT AUDITOR'S REPORT

The Board of Directors  
Indianapolis Academy of Excellence, Inc.

### **Report on the Financial Statements**

We have audited the accompanying financial statements of **Indianapolis Academy of Excellence, Inc.**, which comprise the statement of financial position as of June 30, 2015, the related statements of activities and cash flows for the year then ended, and the related notes to the financial statements.

### **Management's Responsibility for the Financial Statements**

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

### **Auditor's Responsibility**

Our responsibility is to express an opinion on these financial statements based on our audit. We conducted our audit in accordance with auditing standards generally accepted in the United States of America. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

**Opinion**

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of **Indianapolis Academy of Excellence, Inc.** as of June 30, 2015, and the changes in its net assets and its cash flows for the year then ended in accordance with accounting principles generally accepted in the United States of America.

*Donovan P.C.*

Indianapolis, IN  
December 1, 2015

INDIANAPOLIS ACADEMY OF EXCELLENCE, INC.

Statement of Financial Position

<u>Assets</u>	<u>June 30, 2015</u>
Current assets:	
Cash	\$ 50,674
Grants receivable	138,198
Prepaid expenses	7,854
Total current assets	<u>196,726</u>
Property and equipment:	
Vehicles	21,929
Furniture and equipment	192,043
Textbooks	16,476
Less: accumulated depreciation	(39,896)
Property and equipment, net	<u>190,552</u>
	<u>\$ 387,278</u>
<u>Liabilities and Net Assets</u>	
Current liabilities:	
Accounts payable and accrued expenses	\$ 203,930
Current portion of equipment loan	5,096
Total current liabilities	<u>209,026</u>
Equipment loan	5,189
Forgivable note payable	100,000
Deferred rent payable	49,390
Total liabilities	<u>363,605</u>
Net assets:	
Unrestricted	(96,080)
Temporarily restricted	119,753
	<u>23,673</u>
	<u>\$ 387,278</u>

See accompanying notes to financial statements.



INDIANAPOLIS ACADEMY OF EXCELLENCE, INC.

Statement of Activities

	Year Ended June 30, 2015		
	Unrestricted	Temporarily Restricted	Total
<u>Revenue and Support</u>			
State education support	\$ 476,448	-	476,448
Grant revenue	406,311	-	406,311
Student fees	235	-	235
Contributions	835	137,700	138,535
Interest income	41	-	41
Other income	944	-	944
Net assets released from restrictions	213,833	(213,833)	-
Total revenue and support	<u>1,098,647</u>	<u>(76,133)</u>	<u>1,022,514</u>
 <u>Expenses</u>			
Program services	866,893	-	866,893
Management and general	359,537	-	359,537
Total expenses	<u>1,226,430</u>	<u>-</u>	<u>1,226,430</u>
 Decrease in net assets	(127,783)	(76,133)	(203,916)
 Net assets, beginning of year	<u>31,703</u>	<u>195,886</u>	<u>227,589</u>
 Net assets (deficiency), end of year	<u>\$ (96,080)</u>	<u>119,753</u>	<u>23,673</u>

See accompanying notes to financial statements.

INDIANAPOLIS ACADEMY OF EXCELLENCE, INC.

Statement of Cash Flows

	Year Ended June 30, 2015
<u>Operating Activities</u>	
Change in net assets	\$ (203,916)
Adjustments to reconcile change in net assets to net cash flows from operating activities:	
Depreciation	37,649
Change in:	
Grants receivable	(120,183)
Prepaid expenses	(3,501)
Accounts payable and accrued expenses	153,460
Deferred rent	49,390
Net cash used by operating activities	<u>(87,101)</u>
<u>Investing Activities</u>	
Purchases of property and equipment	<u>(171,144)</u>
Net cash used by investing activities	<u>(171,144)</u>
<u>Financing Activities</u>	
Proceeds from equipment loan	11,900
Proceeds from forgivable notes payable	100,000
Principal repayment of equipment loan	<u>(1,615)</u>
Net cash provided by financing activities	<u>110,285</u>
Net decrease in cash	(147,960)
Cash, beginning of year	<u>198,634</u>
Cash, end of year	<u><u>\$ 50,674</u></u>
Supplemental disclosures:	
Cash payments for interest expense	\$ 229

See accompanying notes to financial statements.

INDIANAPOLIS ACADEMY OF EXCELLENCE, INC.

Notes to Financial Statements

June 30, 2015

(1) Summary of Significant Accounting Policies

General

Indianapolis Academy of Excellence, Inc. (the “School”) is a public benefit not-for-profit organization incorporated under the laws of the State of Indiana. The School operates a public charter school established under Indiana Code 20-24 and sponsored by the Indiana Charter School Board. The School began operations in July 2014 and provided educational instruction to approximately 70 students in grades kindergarten through three during the 2014-15 academic year.

Accounting Estimates

The preparation of financial statements in conformity with accounting principles generally accepted in the United States of America requires management to make estimates and assumptions that affect certain reported amounts and disclosures. Actual results could differ from those estimates.

Revenue Recognition

Revenues primarily come from resources provided under the Indiana Charter Schools Act. Under the Act, the School receives an amount per student in relation to the funding received by other public schools in the same geographic area. Funding from the State of Indiana is based on enrollment, and paid in monthly installments in July through June coinciding with the academic school year. Revenue is recognized in the year in which the educational services are rendered.

A portion of the School’s revenue is the product of cost reimbursement grants. Accordingly, the School recognizes revenue under these grants in the amount of costs and expenses at the time they are incurred.

Grants Receivable

Grants receivable relate primarily to activities funded under federal programs. The School believes that it is operating in compliance with regulatory requirements and as such no allowance for doubtful accounts is deemed necessary.

INDIANAPOLIS ACADEMY OF EXCELLENCE, INC.

Notes to Financial Statements

(1) Summary of Significant Accounting Policies, Continued

Financial Statement Presentation

The School reports its financial position and activities according to two classes of assets as follows:

- Unrestricted net assets, which represent net assets that the Board of Directors has discretionary control to use in carrying on the activities of the School in accordance with its articles of incorporation and by-laws.
- Temporarily restricted net assets, which represent net assets restricted by the donor, grantor, or other outside party for a specific purpose or until the passage of time.

Taxes on Income

Indianapolis Academy of Excellence, Inc. has received a determination from the U.S. Treasury Department stating that it qualifies under the provisions of Section 501(c)(3) of the Internal Revenue Code as a tax-exempt organization; however, the School would be subject to tax on income unrelated to its tax-exempt purpose. For the year ended June 30, 2015, no accounting for federal and state income taxes was required to be included in the accompanying financial statements.

Professional accounting standards require the School to recognize a tax liability only if it is more likely than not the tax position would be sustained in a tax examination, with a tax examination being presumed to occur. The amount recognized is the largest amount of tax liability that is greater than 50% likely of being realized on examination. For tax positions not meeting the more-likely-than-not test, no tax liability is recorded. The School has examined this issue and has determined that there are no material contingent tax liabilities or questionable tax positions. Tax years ending 2015 and 2014 are open to audit for both federal and state purposes.

INDIANAPOLIS ACADEMY OF EXCELLENCE, INC.

Notes to Financial Statements

(1) Summary of Significant Accounting Policies, Continued

Property and Equipment

Purchases of these assets and expenditures that materially increase value or extend useful lives are capitalized and are included in the accounts at cost. Routine maintenance and repairs, minor replacement costs, and equipment purchases with a unit cost of less than \$1,000 are charged to expense as incurred.

Depreciation is provided over the estimated useful lives of the respective assets using the straight-line method. The estimated useful lives generally are as follows

Vehicles .....	5 years
Furniture and equipment .....	3 years
Textbooks .....	4 years

Subsequent Events

The School evaluated subsequent events through December 1, 2015, the date these financial statements were available to be issued. Events occurring through that date have been evaluated to determine whether a change in the financial statements or related disclosures would be required.

Deferred Rent Payable

The operating lease on the school facility contains a provision for future rent increases. In accordance with generally accepted accounting principles, the School records monthly rent expense equal to the total payments due over the lease term, divided by the number of months of the lease term. The difference between rent expense recorded and the amount paid is reflected as deferred rent payable in the accompanying statement of financial position.

INDIANAPOLIS ACADEMY OF EXCELLENCE, INC.

Notes to Financial Statements

(2) Lease

The School executed a fifty-nine month lease on a building used as its school facility under an operating lease agreement that commenced on August 1, 2014. The lease provides for monthly rental payments that escalate over the term of the agreement. The School has the option to renew the lease for an additional five-year term. Under the lease, the School is also responsible for all repairs, maintenance, utilities, and insurance. Total lease expense for the year-ended June 30, 2015 was \$110,990.

Following is a schedule of future minimum lease obligations as of June 30, 2015:

<u>Year Ended June 30:</u>	
2016 .....	\$ 109,200
2017 .....	141,503
2018 .....	141,503
2019 .....	141,503

(3) Equipment Loan

The equipment loan at June 30, 2015 consisted of a note payable to National Bus Sales, Inc. The note is payable in monthly installments of \$538, including interest at 8% per annum, through April 2017 and is secured by a lien on the related vehicle.

Principal maturities under the loan agreement are as follows:

<u>Year Ended June 30:</u>	
2016 .....	\$ 5,096
2017 .....	<u>5,189</u>
	<u>\$10,285</u>

INDIANAPOLIS ACADEMY OF EXCELLENCE, INC.

Notes to Financial Statements

(4) Forgivable Note Payable

The School has a note payable to Team CFA Foundation. The note is for a total of \$300,000, to be disbursed in annual installments of \$100,000 over a three-year period beginning July 2014. The loan is unsecured and non-interest bearing. As of June 30, 2015, the School had received proceeds of \$100,000. Provided the School remains a Challenge Foundation Academy in good standing, the loan will be forgiven at a rate of \$100,000 per year in July 2018, 2019, and 2020. In the event that the Affiliate School Agreement between Team CFA Foundation and the School is terminated before July 1, 2020, the School will be required to pay to the order of Team CFA Foundation the remaining unforgiven principal balance outstanding, plus default interest of 6% per annum, within 30 days of the date of termination.

(5) Restricted Net Assets

Temporarily restricted net assets represent resources received from grantors and donors but not expended for the restricted purposes as of June 30, 2015. Temporarily restricted net assets as of June 30, 2015 were available for the following purposes:

Start-up costs .....	\$40,175
Technology costs .....	<u>79,578</u>
	<u>\$119,753</u>

Net assets were released from donor restrictions by incurring expenses or purchasing assets satisfying the restricted purpose. The following purpose restrictions were accomplished during the year ended June 30, 2015:

Start-up costs .....	\$155,711
Technology costs .....	46,422
Teacher development.....	<u>11,700</u>
	<u>\$213,833</u>

INDIANAPOLIS ACADEMY OF EXCELLENCE, INC.

Notes to Financial Statements

(6) Risks and Uncertainties

The School provides educational instruction to students residing in Marion County, Indiana, and is subject to the risks of economic and competitive forces at work within this geographic area.

The majority of revenues relate to legislation enacted by the State of Indiana and grants awarded under federal programs. Changes in state or federal legislation could significantly affect the School. Additionally, the School is subject to monitoring and audit by state and federal agencies. Those examinations may result in additional liability to be imposed on the School.

Financial instruments that potentially subject the School to concentrations of credit risk consist principally of receivables from the State of Indiana. At June 30, 2015, substantially all of the receivable balance was due from the State of Indiana. In addition, deposits maintained at The Huntington National Bank and are insured up to the FDIC insurance limit.



INDIANAPOLIS ACADEMY OF EXCELLENCE, INC.

Notes to Financial Statements

(7) Functional Expense Reporting

The costs of providing the educational activities have been summarized on a functional basis in the statement of activities. Accordingly, certain expenses have been allocated between program and management services. Following is a summary of expenses comprising each program and/or service for the year ended June 30, 2015:

	<u>2015</u>	
	<u>Program Services</u>	<u>Management and General</u>
Salaries and wages.....	\$341,528	230,108
Employee benefits .....	60,110	34,623
Professional services .....	91,194	47,550
Staff development.....	41,028	-
Travel.....	-	11,634
Equipment .....	17,528	-
Food service .....	64,317	-
Classroom, kitchen and office supplies ...	40,365	12,459
Repairs and maintenance.....	13,719	-
Occupancy .....	157,784	-
Depreciation .....	37,649	-
Interest .....	-	229
Insurance .....	-	13,768
Other .....	<u>1,671</u>	<u>9,166</u>
	<u>\$866,893</u>	<u>359,537</u>

INDIANAPOLIS ACADEMY OF EXCELLENCE, INC.

Other Reports

Year Ended June 30, 2015

The report presented herein was prepared in addition to another official report prepared for the School as listed below:

Supplemental Audit Report of Indianapolis Academy of Excellence, Inc.

The Supplemental Audit Report contains the results of compliance testing required by the Indiana State Board of Accounts under its *Guidelines for the Audits of Charter Schools Performed by Private Examiners* pertaining to matters addressed in its *Accounting and Uniform Compliance Guidelines Manual for Indiana Charter Schools*.



December 9, 2015

The Board of Directors  
Indianapolis Academy of Excellence, Inc.

We have audited the financial statements of **Indianapolis Academy of Excellence, Inc.** ("the School") for the year ended June 30, 2015, and have issued our report thereon dated December 1, 2015. Professional standards require that we provide you with information about our responsibilities under generally accepted auditing standards, as well as certain information related to the planned scope and timing of our audit. We have communicated such information in our letter to you dated July 28, 2015. Professional standards also require that we communicate to you the following information related to our audit.

#### **Qualitative Aspects of Accounting Practices**

Management is responsible for the selection and use of appropriate accounting policies. The significant accounting policies used by the School are described in Note 1 to the financial statements. No new accounting policies were adopted and the application of existing policies was not changed during 2015. We noted no transactions entered into by the School during the year for which there is a lack of authoritative guidance or consensus. All significant transactions have been recognized in the financial statements in the proper period.

Accounting estimates are an integral part of the financial statements prepared by management and are based on management's knowledge and experience about past and current events and assumptions about future events. Certain accounting estimates are particularly sensitive because of their significance to the financial statements and because of the possibility that future events affecting them may differ significantly from those expected. There are no estimates in the School's financial statements that are considered significant for purposes of this letter.

Certain financial statement disclosures are particularly sensitive because of their significance to financial statement users. The financial statement disclosures are neutral, consistent, and clear.

#### **Difficulties Encountered in Performing the Audit**

We encountered no significant difficulties in dealing with management in performing and completing our audit.

## **Corrected and Uncorrected Misstatements**

Professional standards require us to accumulate all misstatements identified during the audit, other than those that are clearly trivial, and communicate them to the appropriate level of management. Management has corrected all such misstatements. The following adjustments were made as a result of our audit:

- Entry to record receivables under the Implementation Grant, which increased net assets by \$80,111.
- Entry to adjust the liability for amounts owing under teacher contracts, which decreased net assets by \$17,817.
- Entry to recognize revenue under the Walton Grant in fiscal 2014 when the contribution was received, which increased net assets as of June 30, 2014 by \$155,710.
- Entry to record the CFA Forgivable Loan as a liability, which decreased net assets by \$100,000.
- Entry to record a liability for building rent in order to report expense on a straight-line basis, which decreased net assets by \$49,390.
- Entry to record revenue for grant funds that was recorded directly to temporarily restricted net assets in the amount of \$49,312.

## **Disagreements with Management**

For purposes of this letter, a disagreement with management is a financial accounting, reporting, or auditing matter, whether or not resolved to our satisfaction, that could be significant to the financial statements or the auditor's report. No such disagreements arose during the course of our audit.

## **Management Representations**

We have requested certain representations from management that are included in the management representation letter dated December 1, 2015.

## **Management Consultations with Other Independent Accountants**

In some cases, management may decide to consult with other accountants about auditing and accounting matters, similar to obtaining a "second opinion" on certain situations. If a consultation involves application of an accounting principle relating to the School's financial statements or a determination of the type of auditor's opinion that may be expressed on those statements, our professional standards require the consulting accountant to communicate with us to determine that the consultant has all the relevant facts. To our knowledge, there were no such consultations with other accountants.

This information is intended solely for the use of the board of directors and management of **Indianapolis Academy of Excellence, Inc.** and is not intended to be used and should not be used by anyone other than these specified parties.

Very truly yours,

*Donovan P.C.*

SUPPLEMENTAL AUDIT REPORT  
OF  
**INDIANAPOLIS ACADEMY OF EXCELLENCE, INC.**  
MARION COUNTY, INDIANA  
July 1, 2014 to June 30, 2015



INDIANAPOLIS ACADEMY OF EXCELLENCE, INC.

MARION COUNTY, INDIANA

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INDIANAPOLIS ACADEMY OF EXCELLENCE, INC.

MARION COUNTY, INDIANA

School Officials

July 1, 2014 to June 30, 2015

<u>Office</u>	<u>Official</u>	<u>Term</u>
Board President	Rosemily Geyer	07/01/14 – 06/30/15
School Leader	Joe Burleson	07/01/14 – 05/31/15
	Tara Gustin	06/01/15 – 05/30/15
School Treasurer	Joe Burleson	07/01/14 – 05/31/15
	Tara Gustin	06/01/15 – 06/30/15





The Board of Directors  
Indianapolis Academy of Excellence, Inc.

We have audited the financial statements of **Indianapolis Academy of Excellence, Inc.** (the “School”) as of and for the year ended June 30, 2015 and have issued our report thereon dated December 1, 2015. As part of our audit, we tested the School’s compliance with provisions of the *Accounting and Uniform Compliance Guidelines Manual for Indiana Charter Schools* issued by the Indiana State Board of Accounts and related provisions of laws, regulations, contracts and grant agreements. Reported in the Audit Results and Comments are matters where we believe the School was not in compliance with those provisions.

*Donovan P.C.*

Indianapolis, IN  
December 1, 2015

INDIANAPOLIS ACADEMY OF EXCELLENCE, INC.

MARION COUNTY, INDIANA

Audit Results and Comments

July 1, 2014 to June 30, 2015

VENDOR DISBURSEMENTS

We selected for examination a sample of 49 vendor disbursement transactions from throughout the 2015 fiscal year. Within this sample, we noted two instances where late fees were paid and twelve instances where sales tax was paid.

Officials and employees have the duty to pay claims and remit taxes in a timely fashion. Additionally, officials and employees have a responsibility to perform duties in a manner which would not result in any unreasonable fees being assessed against the governmental unit. Any penalties, interest or other charges paid by the governmental unit may be the personal obligation of the responsible official or employee. (Accounting and Uniform Compliance Guidelines Manual for Indiana Charter Schools, Part 10)

Charter schools are eligible for an exemption from the state sales tax on purchases. To obtain the exemption for a Sales Tax Exemption Certificate, application shall be made to the Sales Tax Division of the Department of Revenue. This certificate must be presented at the time a purchase is made to avoid paying sales tax. If sales tax is paid erroneously, a refund application may be obtained from the Sales Tax Division. (Accounting and Uniform Compliance Guidelines Manual for Indiana Charter Schools, Part 10)

PAYROLL COMPLIANCE

The School was unable to provide employment contracts or other form of documentation to support employee compensation rates for four of its twelve employees.

All compensation and benefits paid to employees must be included in the labor contract or salary schedule unless otherwise authorized by statute. (Accounting and Uniform Compliance Guidelines Manual for Indiana Charter Schools, Part 10)

INDIANAPOLIS ACADEMY OF EXCELLENCE, INC.

MARION COUNTY, INDIANA

Audit Results and Comments, Continued

July 1, 2014 to June 30, 2015

SCHOOL LUNCH REPORTING AND ELIGIBILITY

The School could not provide documentation to support that the federally-required verification of financial data was completed with regard to eligibility of students for free or reduced-price meals. Additionally, the School could not provide documentation to support the number of meals claimed for reimbursement for the sample periods selected for examination.

The results of test checks are to be reported to the Indiana Department of Education in accordance with 7CFR 245.6a...An error for purposes of the test-check is an approved application, attempted to be verified that cannot be verified by the program participants with requested income verification information (i.e., paycheck stub, W-2, etc.).

The State Board of Accounts is of the audit position charter schools shall request a written position from the Indiana Department of Education stating whether the corrective action taken was sufficient or if additional verifications need to be performed when high incidences of errors in test sample verifications are noted. The written communication to the Department of Education must also request a determination if any increases or decreases in funding will result to the charter school because of the concerns noted with the verification process. (Accounting and Uniform Compliance Guidelines Manual for Indiana Charter Schools, Part 17)

The governing board is charged with the duty to preserve, keep, maintain, or file all the official records of the political subdivision pursuant to IC 5-15-1-1.

A public record is defined as all documentation of the informational, communicative or decision-making processes of the political subdivision in connection with the transaction of public business or governmental functions, which documentation is created, received, retained, maintained, or filed by the political subdivision as evidence of its activities or because of the information value of the data in the documentation, and which is generated on paper or paper substitutes; photographic or chemically based media; magnetic or machine readable media; or any other materials, regardless of form or characteristics. [IC 5-15-5.1-1] (Accounting and Uniform Compliance Guidelines Manual for Indiana Charter Schools, Part 12)

INDIANAPOLIS ACADEMY OF EXCELLENCE, INC.

MARION COUNTY, INDIANA

Exit Conference

July 1, 2014 to June 30, 2015

The contents of this report were discussed on December 9, 2015 with Rosemily Geyer (Board President) and Tara Gustin (School Leader). The Official Response has been made a part of this report and may be found on page 6.



A Challenge Foundation Academy

P: (317) 653-4009  
F: (317) 653-4008

[iae.teamcfa.school](mailto:iae.teamcfa.school)

December 15, 2015

## Responses to Findings in the 2014-2015 Audit

### Finding 1

There were 49 cash disbursement transactions throughout the 2015 fiscal year. Within the testing of the records, it was found that we paid late fees on two items and there were twelve instances where sales tax was paid.

IAE staff is going through all files and invoices from different vendors to ensure we are not being charged tax. We will continue to scrub the invoices and file for a refund as we come across errors. Moving forward, we will make sure that all vendors have our ST-105 form.

In the past, invoices were only sent to Bookkeeping Plus twice a month. Going forward, weekly packages with invoices will be sent to Bookkeeping Plus to ensure a timely response to all invoices.

### Finding 2

The school was unable to provide staff contracts and other documentation to support compensation rates for four of the twelve employees.

IAE now has Human Resource files for all employees with copies of the contracts and other pertinent documents. All employee contracts have been sent to Bookkeeping Plus for the 2016 fiscal year. Part-time employees are being tracked using a spreadsheet that is given to payroll biweekly.

Employees are required to submit "Request for Time Off" forms for PTO tracking. In addition, teachers are required to sign in and out each day to verify hours. All forms of documentation are kept in the employee HR files, which remains locked.

### Finding 3

IAE could not provide proper documentation of the eligibility of students for free or reduced lunch. For the months that were tested, there was not documentation that supported the claim for reimbursement.

Background: Based on the contract that Joseph Burleson had between IAE and Beach Bound Catering, our records show a discrepancy. It states that there would be 200 meals served throughout the day, 100 at breakfast and 100 at lunch.

**1145 E. 22<sup>nd</sup> St.  
Indianapolis, IN 46202**

Our largest enrollment for the 2015-2016 school year was 68 students; not all of them ate breakfast or lunch on a daily basis. Per the contract, we were being charged for the 200 meals but could not claim reimbursement for them. Other than the IDOE report filed for IAE, there were no records showing which students were eligible for free/reduced lunch.

For the 2016 fiscal year, the contract states that IAE will be charged based on the amount of meals served each day. This corrects the discrepancy from the 2014-2015 school year. Currently, our records are correct. IAE-CFA qualified for the Community Eligibility Program; therefore, 100% of our students may receive free breakfast and lunch. IAE must still keep track of the records. There is a file and checklist to show all students who have applied or are directly certified for free and reduced lunch. IAE-CFA and Beach Bound also reconcile records on a regular basis. The IAE-CFA enrollment packets for the 2016-2017 school year will include the free/reduced lunch applications.



**TEAMCFA FOUNDATION**

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**FINANCIAL STATEMENTS**

**June 30, 2015**

**(See Independent Accountant's Audit Report)**



*Thinking outside the box since 1974*

TEAMCFA FOUNDATION  
(a 501(c)(3) private foundation)

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**INDEPENDENT ACCOUNTANT'S AUDIT REPORT**

To the Board of Directors  
TeamCFA Foundation  
Tempe, Arizona

We have audited the accompanying financial statements of TeamCFA Foundation, which comprise the statement of financial position as of June 30, 2015, the related statement of activities and cash flows for the year then ended, and the related notes to the financial statements.

***Management's Responsibility for the Financial Statements***

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

***Auditor's Responsibility***

Our responsibility is to express an opinion on these financial statements based on our audit. We conducted our audit in accordance with auditing standards generally accepted in the United States of America. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free of material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making these risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

***Opinion***

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of TeamCFA Foundation, as of June 30, 2015 and the results of its activities and cash flows for the year then ended in accordance with accounting principles generally accepted in the United States of America.

This report is intended solely for the information and use of the Foundation's management and potential donors, and is not intended to be and should not be used by anyone other than these specified parties.

***Van Beek & Co.***

Tigard, Oregon  
February 2, 2016

TEAMCFA FOUNDATION  
STATEMENT OF FINANCIAL POSITION  
June 30, 2015  
(See Independent Accountant's Audit Report)

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**ASSETS:**

Cash	\$ 1,369,074
Forgivable loans	<u>860,000</u>
Total assets	<u>\$ 2,229,074</u>

**LIABILITIES AND NET ASSETS:**

Accounts payable	\$ 442,620
Accrued retirement plan contribution	<u>27,942</u>
Total liabilities	470,562
Unrestricted net assets	<u>1,758,512</u>
Total liabilities and net assets	<u>\$ 2,229,074</u>

The accompanying notes are an integral  
part of the financial statements.

TEAMCFA FOUNDATION  
STATEMENT OF ACTIVITIES  
for the year ended June 30, 2015  
(See Independent Accountant's Audit Report)

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Revenue:	
Contributions (note 5)	<u>\$4,405,000</u>
Expenses:	
Program services	3,208,700
Management and general	<u>702,505</u>
Total expenses	<u>3,911,205</u>
Change in unrestricted net assets	493,795
Unrestricted net assets, beginning of the year	<u>1,264,717</u>
Unrestricted net assets, end of year	<u><u>\$1,758,512</u></u>

The accompanying notes are an integral  
part of the financial statements.

TEAMCFA FOUNDATION  
STATEMENT OF CASH FLOWS  
for the year ended June 30, 2015  
(See Independent Accountant's Audit Report)

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**Cash flows from operating activities:**

Cash received from contributions (note 5)	\$ 4,405,000
Cash paid to suppliers and employees	(3,959,921)
Cash paid to network schools (forgivable loans, note 2)	<u>(560,000)</u>
Net cash used by operating activities	<u>(114,921)</u>
Cash, beginning of year	<u>1,483,995</u>
Cash, end of year	<u>\$ 1,369,074</u>
<b>Reconciliation of change in unrestricted net assets to net cash used by operating activities:</b>	
Change in unrestricted net assets	\$ 493,795
Adjustments to reconcile change in unrestricted net assets to net cash used by operating activities:	
Increase in forgivable loans	(560,000)
Decrease in accounts payable	(76,658)
Increase in accrued retirement plan contribution	<u>27,942</u>
Net cash used by operating activities	<u>\$ (114,921)</u>

The accompanying notes are an integral  
part of the financial statements.

TEAMCFA FOUNDATION  
NOTES TO FINANCIAL STATEMENTS  
(See Independent Accountant's Audit Report)

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1. **THE FOUNDATION AND SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES:**

TeamCFA Foundation (“the Foundation), a 501(3)(c) private foundation since 2010, is a network of free, public charter schools, built on the values of hard work, good citizenship and teamwork. The ultimate goal of the network is to graduate thoughtful, articulate youth who are prepared to become productive, accountable, engaged citizens. They do so by implementing the Core Knowledge Sequence, a research-based, coherent, cumulative, content-specific K-8 curriculum, which is infused into teaching skills such as reading and writing.

Schools in the TeamCFA network gain access to start-up funding, grants, training, service, the Core Knowledge curriculum, and – in some cases – the necessary facilities through Challenge Foundation Properties, a related entity (note 5). Currently, the Foundation’s network consists of 15 charter schools throughout the Midwest, Southeast and Southwest regions of the United States.

Following is a summary of the Foundation’s significant accounting policies:

**Cash Equivalents:**

The Foundation considers all short-term, highly liquid investments with original maturities of three months or less to be cash equivalents. There were no cash equivalents at June 30, 2015.

**Forgivable Loans:**

The Foundation offers a program to incentivize schools to join the TeamCFA network, whereby a newly joined school can receive up to \$300,000 in loans from the Foundation to successfully implement the Core Knowledge curriculum. The loan is structured so that a school may receive up to \$100,000 per year during each of the first three years as a network school. Assuming that the school remains a network school in good standing with the Foundation, up to \$100,000 of the loan (i.e.: one-third of the outstanding balance) is forgiven during the fourth year, fifth year and sixth year. Forgivable loans will be recorded as contribution expense in each year they are forgiven.

**Impairment of Long-Lived Assets:**

Long-lived assets (i.e., forgivable loans, note 2) are evaluated for impairment whenever events or changes in circumstances indicate the carrying amount of an asset may not be fully recoverable. The Foundation evaluates the carrying amount of its loans based on network schools’ estimated future cash flows and operating income. No impairment loss was recognized for the year ended December 31, 2015.

TEAMCFA FOUNDATION  
NOTES TO FINANCIAL STATEMENTS, Continued  
(See Independent Accountant's Audit Report)

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1. **THE FOUNDATION AND SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES.**  
Continued:

Use of Estimates:

The preparation of financial statements in conformity with accounting principles generally accepted in the United States of America requires management to make estimates and assumptions that affect certain reported amounts and disclosures. Accordingly, actual results could differ from those estimates.

Subsequent Events:

Subsequent events that could affect the Foundation's financial statements and related disclosures have been evaluated through February 2, 2016, the date the financial statements were available for distribution.

Income Taxes:

The Foundation is exempt from federal and state taxation under Section 501(c)(3) of the Internal Revenue Code. Accordingly, no income tax provision is recorded.

The Foundation does not enter into transactions or take uncertain tax positions that would require adjustment to or disclosure in the financial statements under FASB ASC 740, *Income Taxes*. In addition, the Foundation's return of private foundation for years prior to 2012 are no longer subject to examination by tax authorities.

Concentrations of Risk:

Cash:

The Foundation's cash subjects the Foundation to concentrations of potential credit risk. The Foundation limits its risk by depositing cash with an established financial institution (Umpqua Bank) which received a "sound" rating from BankRate. The Foundation's cash deposits (\$1,369,074 at June 30, 2015) are only insured up to \$250,000 by the Federal Deposit Insurance Corporation ("FDIC").

Significant Grantor:

The Foundation has one grantor who individually contributed 100% of the Foundation's contributions for the year ended June 30, 2015 (note 5).

TEAMCFA FOUNDATION  
NOTES TO FINANCIAL STATEMENTS, Continued  
(See Independent Accountant's Audit Report)

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2. **FORGIVABLE LOANS:**

Forgivable loans consist of the following at June 30, 2015:

Excelsior Classical Academy	\$ 50,000
Shining Rock Classical Academy	50,000
Veritas Community School	60,000
Indianapolis Academy of Excellence	100,000
Hirsch Academy	200,000
Aristotle Preparatory Academy	200,000
Cornerstone Charter Academy	<u>200,000</u>
 Total forgivable loans	 <u>\$860,000</u>

Forgivable loans contain “conditional promises to give” and are reported at cost. The forgiveness of the principal amount is recognized as a contribution made by reducing the loan’s carrying amount and recognizing contribution expense when the condition(s) for forgiveness are substantially met, i.e., when the conditional promise becomes unconditional.

The conditions for forgiveness were not yet met at June 30, 2015; therefore all of the loans are stated at cost at June 30, 2015. No loans were forgiven during the year ended June 30, 2015.

Under these loan agreements, interest is accrued only when a school leaves the network before the conditions are met; as such, no interest was accrued or paid during the year ended June 30, 2015.

Forgivable loans are scheduled to be recognized as contribution expense under this program as follows for the years ending June 30:

2017	\$ 300,000
2018	<u>560,000</u>
	<u>\$ 860,000</u>

3. **RETIREMENT PLAN:**

The Foundation maintains a simplified employee pension plan (“SEP”) for its eligible employees. The Foundation makes a discretionary contribution totaling 7% of eligible employee compensation into individual retirement accounts (SEP-IRA) set up for each eligible employee. Contributions charged to activities totaled \$64,472 for the year ended June 30, 2015.

TEAMCFA FOUNDATION  
NOTES TO FINANCIAL STATEMENTS, Continued  
(See Independent Accountant's Audit Report)

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4. **PROGRAM SERVICES:**

The Foundation assists its network schools implementation of the core knowledge sequence as follows:

**Grants and Donations:**

The Foundation provides periodic grants to schools in its network to help pay for technology (hardware and software), school leadership personnel, and attendance at the annual TeamCFA National Conference. Grants and donations expense totaled \$576,045 and is reported in the statement of activities for the year ended June 30, 2015.

**School Marketing:**

The Foundation provides financial assistance to new schools in its network to help offset costs for marketing materials such as banners, stationery, brochures and other materials used to help schools advertise and boost enrollment. School marketing expense totaled \$136,903 and is reported in the statement of activities for the year ended June 30, 2015.

**Board and Committee Stipends:**

The Foundation engages many people with expertise in areas that promote the best academic, business, technology and governance practices to enhance the success of its network schools. These experts assist the schools with training and mentorship in their area of expertise. In addition, each school is assigned two board representatives that serve as liaisons between the school and the Foundation. Each of these experts and board representatives receives a stipend and travel reimbursement for their service. Board and committee stipend expense totaled \$386,226 and is reported in the statement of activities for the year ended June 30, 2015.

**National Conference:**

The Foundation holds an annual conference each year, which is attended by the Foundation's personnel and board members, school board members, school directors and deserving teaching and administrative staff. The conference is designed to promote collaboration through team building exercises and networking and excellence through professional development in the areas of academics, business, governance and technology. National conference expense totaled \$212,070 and is reported in the statement of activities for the year ended June 30, 2015.



TEAMCFA FOUNDATION  
NOTES TO FINANCIAL STATEMENTS, Continued  
(See Independent Accountant's Audit Report)

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5. **RELATED PARTY TRANSACTIONS:**

The Foundation received \$4,405,000 of contributions for the year ended June 30, 2015 from its founders John and Martha Bryan and the Challenge Foundation, a private family trust controlled by John and Martha Bryan. John and Martha Bryan also have the right to assign two members to the Foundation's board.

The Foundation paid board stipends (note 4) totaling \$12,500 for the year ended June 15, 2015 to a board member related to John and Martha Bryan.

The Foundation paid board stipends (note 4) totaling \$12,500 for the year ended June 30, 2015 to a board member who is also the Executive Director of The Challenge Foundation (see above).

Challenge Foundation Properties ("CFP"), an organization also founded by John and Martha Bryan, provides school facilities to some of the Foundation's network schools. There were no transactions between the Foundation and CFP during the year ended June 30, 2016.

6. **COMMITMENTS:**

The Foundation has made "conditional promises to give" money to network schools under a forgivable loan program (note 2). The aggregate minimum annual commitment to fund this program is as follows for the years ending June 30:

2016	\$ 770,000
2017	600,000
2018	<u>170,000</u>
	<u>\$1,540,000</u>

TEAMCFA FOUNDATION  
NOTES TO FINANCIAL STATEMENTS, Continued  
(See Independent Accountant's Audit Report)

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7. **SCHEDULE OF FUNCTIONAL EXPENSES:**

	Program Service	Management and General	Total Expenses
Salaries and wages	\$ 779,915	\$ 395,000	\$1,174,915
Employee benefits	100,681	42,650	143,331
Payroll taxes and other	67,368	30,217	97,585
Grants and donations (note 4)	576,045		576,045
Board and committee stipends (notes 4 and 5)	386,226	77,980	464,206
Travel expense	301,929	78,249	380,178
Marketing and software	360,556		360,556
National conference (note 4)	212,070		212,070
School marketing (note 4)	136,903		136,903
Board expenses	97,408	20,314	117,722
Consulting fees	114,257	119	114,376
Dues and subscriptions	29,585	3,287	32,872
Professional fees		32,711	32,711
Printing and reproduction	17,290	533	17,823
Training and seminars	11,701		11,701
Other operating expenses	16,766	21,445	38,211
Total expenses	\$ 3,208,700	\$ 702,505	\$3,911,205

To Phil Byers  
Tisha Crisler  
Tony Helton  
Jason Kay  
Joe Maimone  
TeamCFA Foundation

Brad Miller  
Ryan Stowers  
William Steinbrook  
Fritz Steiger

We have audited the financial statements and supplementary information of TeamCFA Foundation (the "Foundation") as of June 30, 2015 and for the year then ended, and have issued our report thereon dated February 1, 2016. Professional standards require us to provide you with information about our responsibilities under generally accepted auditing standards, as well as certain information related to the planned scope and timing of our audit. We have communicated such information to you in our December 18, 2015 letter about such matters. Professional standards also require that we communicate to you the following information related to the completion of our audit:

### Significant Audit Findings

#### *Qualitative Aspects of Accounting Policies and Practices*

Management is responsible for the selection and use of appropriate accounting policies. The significant accounting policies used by the Foundation are described in note 1 to the financial statements. No new accounting policies were adopted and the application of existing policies did not change during the year. We noted no material transactions entered into by the Foundation during the year for which there is a lack of authoritative guidance or consensus. All significant transactions have been recognized in the financial statements in the proper period.

#### *Accounting Estimates*

Accounting estimates are an integral part of the financial statements prepared by management and are based on management's knowledge and experience about past and current events, as well as assumptions about future events. Certain accounting estimates can be particularly sensitive because their significance to the financial statements and the possibility that future events affecting them may differ significantly from those expected.

The most sensitive estimates affecting the financial statements are:

- The Schedule of Functional Expenses (note 7) contains Management's allocation of the allocation of costs between program services and management and general purposes. The allocation method varies with the type of expense, as follows:
  - Payroll expenses are allocated based on the nature of the work being performed.
  - Certain expense types by their nature are allocated entirely to program services. Examples of this type of expense are National Conference costs, Grants and Donations, and Marketing and Software.

- Other types of expenses are directly allocated between program services and management and general based on how the expense was incurred and by whom. Examples of these types of expenses include Travel, Consulting and Board Stipends.

### *Financial Statement Disclosures*

Certain financial statement disclosures are particularly sensitive because of their significance to financial statement users. The most sensitive disclosures affecting the financial statements are:

- The disclosure of related party transactions (note 5) is required by ASC 850-10-50-1, and describes the nature of the related party relationships, as well as descriptions of the related party transactions.
- The disclosure of forgivable loans (notes 1 and 2) describes the loans as “conditional promises to give” and are reported at cost. The loans will be recognized as contribution expense when the conditions for forgiveness are substantially met, over a period of six years.

The financial statement disclosures are neutral, consistent, and clear.

### *Difficulties Encountered in Performing the Audit*

We encountered no significant difficulties in performing and completing our audit.

### *Uncorrected Misstatements*

Professional standards require us to accumulate all known and likely misstatements identified during the audit, other than those that are trivial, and communicate them to the appropriate level of management. Certain adjustments are considered material either because of their dollar value or their qualitative aspects.

The attached schedule of “adjusting journal entry” (Exhibit 1) lists the one adjusting entry identified during the audit and adjusted by management.

The attached schedule of “passed adjusting journal entry” (Exhibit 2) lists the one uncorrected misstatement in the financial statements. Management has determined that its effects is immaterial to the financial statements as a whole.

### *Disagreements with Management*

For purposes of this letter, our professional standards define a disagreement with management as a financial accounting, reporting or auditing matter, whether or not resolved to our satisfaction that could be significant to the financial statements or the auditor’s report. We are pleased to report that no such disagreements arose during the course of our audit.

### *Management Representations*

We have requested certain representations from management that are included in the management representation letter dated February 2, 2016.

### *Management Consultations with Other Independent Accountants*

In some cases, management may decide to consult with other accountants about auditing and accounting matters, similar to obtaining a "second opinion" on certain situations. If a consultation involves application of an accounting principle to the Foundation's financial statements or a determination of the type of auditor's opinion that may be expressed on those statements, our professional standards require the consulting accountant to check with us to determine that the consultant has all the relevant facts. To our knowledge, there were no such consultations with other accountants.

### *Other Audit Findings or Issues*

We generally discuss a variety of matters, including the application of accounting principles and auditing standards, with management each year prior to retention as the Foundation's auditors. However, these discussions occurred in the normal course of our professional relationship and our responses were not a condition to our retention.

### Other Matters

With respect to the Schedule of Functional Expenses in note 7 to the financial statements, we made certain inquiries of management and evaluated the form, content, and methods of preparing the information to determine that the information complies with United States generally accepted accounting principles, the method of preparing it has not changed from the prior period, and the information is appropriate and complete in relation to our audit of the financial statements. We compared and reconciled the Schedule of Functional Expenses to the underlying accounting records used to prepare the financial statements or to the financial statements themselves.

This information is intended solely for the use of the Foundation's Board of Directors and management, and is not intended to be and should not be used by anyone other than these specified parties.

*Van Beek & Co.*

Tigard, Oregon  
February 2, 2016

Attachment: Exhibit 1

EXHIBIT 1

ADJUSTING JOURNAL ENTRY

Retirement Plan Expense	27,942	
Accrued Retirement Plan Contribution		27,942

To accrue additional retirement plan contributions paid in July 2015.

EXHIBIT 2

PASSED ADJUSTING JOURNAL ENTRY

Legal Expense	11,036	
Accrued Liability		11,036

To accrue legal fees that should have been recorded at June 30, 2015

**TEAMCFA FOUNDATION**  
**STATEMENT OF FINANCIAL POSITION**

(Unaudited)  
June 30, 2014

<b>ASSETS</b>		
Cash		\$1,483,996
Forgivable Loans		<u>300,000</u>
	<b>TOTAL ASSETS</b>	<b><u>\$1,783,996</u></b>
<b>LIABILITIES &amp; NET ASSETS</b>		
Accounts Payable		<u>\$ 519,278</u>
	<b>Total Liabilities</b>	<b><u>\$519,278</u></b>
Beginning Net Assets		\$840,978
Current Net Surplus		<u>423,740</u>
	<b>Ending Unrestricted Net Assets</b>	<b><u>\$1,264,718</u></b>
	<b>TOTAL LIABILITIES &amp; NET ASSETS</b>	<b><u>\$1,783,996</u></b>

**TEAMCFA FOUNDATION**  
**STATEMENT OF ACTIVITIES**  
(Unaudited)  
**Six Months Ending June 30, 2014**

Grants and Donations	<u>\$2,552,800</u>
<b>TOTAL REVENUE</b>	<b><u>\$2,552,800</u></b>
Salaries and Benefits	\$244,833
Taxes	18,581
Trainings and Seminars	14,835
Grants and Donations Expense	699,105
School Start Up	7,213
Board and Committee Stipends	182,750
National Conference & Board Dinners	346,667
Travel	192,120
Marketing	233,748
Technology	19,324
Legal and Professional	54,500
Other Administrative	<u>115,384</u>
<b>TOTAL EXPENSE</b>	<b><u>\$2,129,060</u></b>
<b>NET SURPLUS</b>	<b><u>\$ 423,740</u></b>



**TEAMCFA FOUNDATION**  
**STATEMENT OF FINANCIAL POSITION**

(Unaudited)  
December 31, 2013

<b>ASSETS</b>	
Cash	\$474,993
Forgivable Loans	<u>400,000</u>
<b>TOTAL ASSETS</b>	<b><u>\$874,993</u></b>
 <b>LIABILITIES &amp; NET ASSETS</b>	
Accounts Payable	\$ 31,415
Other Accrued Liabilities	<u>2,600</u>
<b>Total Liabilities</b>	<b><u>\$34,015</u></b>
 Beginning Net Assets	 \$541,692
Current Net Surplus	<u>299,286</u>
<b>Ending Unrestricted Net Assets</b>	<b><u>\$840,978</u></b>
<b>TOTAL LIABILITIES &amp; NET ASSETS</b>	<b><u>\$874,993</u></b>

**TEAMCFA FOUNDATION  
STATEMENT OF ACTIVITIES**

(Unaudited)

**December 31, 2013**

Grants and Donations	<u>\$3,490,767</u>
<b>TOTAL REVENUE</b>	<b><u>\$3,490,767</u></b>
Salaries and Benefits	\$272,226
Taxes	15,878
Trainings and Seminars	15,741
Grants and Donations Expense	1,320,617
School Start Up	25,993
Board and Committee Stipends	363,750
National Conference & Board Dinners	230,604
Travel	242,905
Marketing	280,391
Technology	202,787
Legal and Professional	77,574
Other Administrative	<u>143,015</u>
<b>TOTAL EXPENSE</b>	<b><u>\$3,191,481</u></b>
<b>NET SURPLUS</b>	<b><u>\$ 299,286</u></b>

**Return of Private Foundation**

**2014**

Department of the Treasury  
Internal Revenue Service

or Section 4947(a)(1) Trust Treated as Private Foundation  
Do not enter social security numbers on this form as it may be made public.

Information about Form 990-PF and its separate instructions is at [www.irs.gov/form990pf](http://www.irs.gov/form990pf).

Open to Public Inspection

For calendar year 2014 or tax year beginning 01/01, 2014, and ending 06/30, 2014

Name of foundation  
**TEAMCFA FOUNDATION**

Number and street (or P O box number if mail is not delivered to street address) Room/suite  
817 E. TODD DRIVE

City or town, state or province, country, and ZIP or foreign postal code  
TEMPLE, AZ 85283

**A** Employer identification number  
26-2778821

**B** Telephone number (see instructions)  
(480) 820-2479

**C** If exemption application is pending, check here

**D** 1 Foreign organizations, check here   
2. Foreign organizations meeting the 85% test, check here and attach computation

**E** If private foundation status was terminated under section 507(b)(1)(A), check here

**F** If the foundation is in a 60-month termination under section 507(b)(1)(B), check here

**G** Check all that apply:  
 Initial return  Initial return of a former public charity  
 Final return  Amended return  
 Address change  Name change

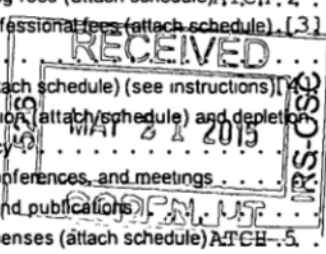
**H** Check type of organization:  Section 501(c)(3) exempt private foundation  
 Section 4947(a)(1) nonexempt charitable trust  Other taxable private foundation

**I** Fair market value of all assets at end of year (from Part II, col. (c), line 16) **\$** 1,783,996.

**J** Accounting method  Cash  Accrual  
 Other (specify) \_\_\_\_\_  
 (Part I, column (d) must be on cash basis)

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
<b>1</b> Contributions, gifts, grants, etc. received (attach schedule) . . . . .	2,552,800.			
<b>2</b> Check <input type="checkbox"/> if the foundation is not required to attach Sch B . . . . .				
<b>3</b> Interest on savings and temporary cash investments . . . . .				
<b>4</b> Dividends and interest from securities . . . . .				
<b>5a</b> Gross rents . . . . .				
<b>b</b> Net rental income or (loss) . . . . .				
<b>6a</b> Net gain or (loss) from sale of assets not on line 10 . . . . .				
<b>b</b> Gross sales price for all assets on line 6a . . . . .				
<b>7</b> Capital gain net income (from Part IV, line 2) . . . . .				
<b>8</b> Net short-term capital gain . . . . .				
<b>9</b> Income modifications . . . . .				
<b>10a</b> Gross sales less returns and allowances . . . . .				
<b>b</b> Less Cost of goods sold . . . . .				
<b>c</b> Gross profit or (loss) (attach schedule) . . . . .				
<b>11</b> Other income (attach schedule) . . . . .				
<b>12</b> Total. Add lines 1 through 11 . . . . .	2,552,800.			
<b>13</b> Compensation of officers, directors, trustees, etc. . . . .	97,500.			97,500.
<b>14</b> Other employee salaries and wages . . . . .	131,833.			131,833.
<b>15</b> Pension plans, employee benefits . . . . .	15,500.			15,500.
<b>16a</b> Legal fees (attach schedule) ATCH 1 . . . . .	6,772.			
<b>b</b> Accounting fees (attach schedule) ATCH 2 . . . . .	35,577.			
<b>c</b> Other professional fees (attach schedule) [3] . . . . .	18,400.			18,400.
<b>17</b> Interest . . . . .				
<b>18</b> Taxes (attach schedule) (see instructions) [4] . . . . .	18,581.			18,581.
<b>19</b> Depreciation (attach schedule) and depletion . . . . .				
<b>20</b> Occupancy . . . . .	2,273.			2,273.
<b>21</b> Travel, conferences, and meetings . . . . .	541,390.			490,294.
<b>22</b> Printing and publications . . . . .	9,449.			9,449.
<b>23</b> Other expenses (attach schedule) ATCH-5 . . . . .	563,680.			553,005.
<b>24</b> Total operating and administrative expenses. Add lines 13 through 23. . . . .	1,440,955.			1,336,835.
<b>25</b> Contributions, gifts, grants paid . . . . .	688,105.			688,105.
<b>26</b> Total expenses and disbursements. Add lines 24 and 25 . . . . .	2,129,060.	0	0	2,024,940.
<b>27</b> Subtract line 26 from line 12:				
<b>a</b> Excess of revenue over expenses and disbursements . . . . .	423,740.			
<b>b</b> Net investment income (if negative, enter -0-) . . . . .		0		
<b>c</b> Adjusted net income (if negative, enter -0-) . . . . .				

SCANNED MAY 27 2015



9

Part II Balance Sheets	Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing . . . . .	474,993.	1,483,996.	1,483,996.
	2 Savings and temporary cash investments . . . . .			
	3 Accounts receivable ▶ Less allowance for doubtful accounts ▶			
	4 Pledges receivable ▶ Less allowance for doubtful accounts ▶			
	5 Grants receivable . . . . .			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions) . . . . .			
	7 Other notes and loans receivable (attach schedule) ▶ *		* 300,000.	ATCH 6
	Less allowance for doubtful accounts ▶	400,000.	300,000.	300,000.
	8 Inventories for sale or use . . . . .			
	9 Prepaid expenses and deferred charges . . . . .			
	10 a Investments - U S and state government obligations (attach schedule), . . . . .			
	b Investments - corporate stock (attach schedule) . . . . .			
	c Investments - corporate bonds (attach schedule) . . . . .			
	11 Investments - land, buildings, and equipment basis Less accumulated depreciation ▶ (attach schedule)			
	12 Investments - mortgage loans . . . . .			
	13 Investments - other (attach schedule) . . . . .			
14 Land, buildings, and equipment basis Less accumulated depreciation ▶ (attach schedule)				
15 Other assets (describe ▶) . . . . .				
16 Total assets (to be completed by all filers - see the instructions Also, see page 1, item I) . . . . .	874,993.	1,783,996.	1,783,996.	
Liabilities	17 Accounts payable and accrued expenses . . . . .	31,415.	519,278.	
	18 Grants payable . . . . .			
	19 Deferred revenue . . . . .			
	20 Loans from officers, directors, trustees, and other disqualified persons . . . . .			
	21 Mortgages and other notes payable (attach schedule) . . . . .			
	22 Other liabilities (describe ▶) . . . . .	2,600.		
23 Total liabilities (add lines 17 through 22) . . . . .	34,015.	519,278.		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.			
	24 Unrestricted . . . . .			
	25 Temporarily restricted . . . . .			
	26 Permanently restricted . . . . .			
	Foundations that do not follow SFAS 117, . . . ▶ <input checked="" type="checkbox"/> check here and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds . . . . .			
	28 Paid-in or capital surplus, or land, bldg, and equipment fund . . . . .			
29 Retained earnings, accumulated income, endowment, or other funds . . . . .	840,978.	1,264,718.		
30 Total net assets or fund balances (see instructions) . . . . .	840,978.	1,264,718.		
31 Total liabilities and net assets/fund balances (see instructions) . . . . .	874,993.	1,783,996.		

Part III Analysis of Changes in Net Assets or Fund Balances			
1	Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return) . . . . .	1	840,978.
2	Enter amount from Part I, line 27a . . . . .	2	423,740.
3	Other increases not included in line 2 (itemize) ▶ . . . . .	3	
4	Add lines 1, 2, and 3 . . . . .	4	1,264,718.
5	Decreases not included in line 2 (itemize) ▶ . . . . .	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 . . . . .	6	1,264,718.

**Part IV Capital Gains and Losses for Tax on Investment Income**

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs MLC Co)		(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a				
b				
c				
d				
e				
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)	
a				
b				
c				
d				
e				
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))	
(j) FMV as of 12/31/69	(k) Adjusted basis as of 12/31/69	(l) Excess of col (i) over col (j), if any		
a				
b				
c				
d				
e				
2 Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }		2	
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c) (see instructions). If (loss), enter -0- in Part I, line 8	{ If gain, also enter in Part I, line 8, column (c) (see instructions). If (loss), enter -0- in Part I, line 8 }		3	

**Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income**

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income)

If section 4940(d)(2) applies, leave this part blank.

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?  Yes  No  
 If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part.

1 Enter the appropriate amount in each column for each year; see the instructions before making any entries.

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2013			
2012			
2011			
2010			
2009			

2 Total of line 1, column (d)	2	
3 Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	
4 Enter the net value of noncharitable-use assets for 2014 from Part X, line 5	4	
5 Multiply line 4 by line 3	5	
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	
7 Add lines 5 and 6	7	
8 Enter qualifying distributions from Part XII, line 4 If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions.	8	

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions)

Table with 11 rows for excise tax calculations. Includes fields for exempt foundations, tax under section 511, add lines 1 and 2, subtitle A tax, tax based on investment income, credits/payments, and overpayment.

Part VII-A Statements Regarding Activities

Table with 10 rows for activity statements. Includes questions about political campaigns, expenditures, IRS reporting, and foundation status.

Part VII-A Statements Regarding Activities (continued)

11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions). . . . . 11 X
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions) . . . . . 12 X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? . . . . . 13 X
Website address WWW.TEAMCFA.ORG
14 The books are in care of TISHA CRISLER Telephone no 480 820-2479
Located at 817 E. TODD DR. TEMPE, AZ ZIP+4 85283
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here . . . . . 15
16 At any time during calendar year 2014, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? . . . . . 16 Yes No X
See the instructions for exceptions and filing requirements for FinCEN Form 114, (formerly TD F 90-221) If "Yes," enter the name of the foreign country

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.
1a During the year did the foundation (either directly or indirectly)
(1) Engage in the sale or exchange, or leasing of property with a disqualified person? . . . . . Yes X No
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? . . . . . Yes X No
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? . . . . . Yes X No
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? . . . . . Yes X No
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? . . . . . Yes X No
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days) . . . . . Yes X No
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? . . . . . 1b
Organizations relying on a current notice regarding disaster assistance check here . . . . .
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2014? . . . . . 1c X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))
a At the end of tax year 2014, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2014? . . . . . Yes X No
If "Yes," list the years
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions) . . . . . 2b X
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? . . . . . Yes X No
b If "Yes," did it have excess business holdings in 2014 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2014) . . . . . 3b
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? . . . . . 4a X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2014? . . . . . 4b X





Form **990-PF**  
 Department of the Treasury  
 Internal Revenue Service

**Return of Private Foundation**  
**or Section 4947(a)(1) Trust Treated as Private Foundation**

▶ Do not enter Social Security numbers on this form as it may be made public. By law, the IRS cannot redact the information on the form.  
 ▶ Information about Form 990-PF and its instructions is at [www.irs.gov/form990pf](http://www.irs.gov/form990pf).

OMB No 1545-0052  
**2013**  
**Open to Public Inspection**

**For calendar year 2013, or tax year beginning 01-01-2013 , and ending 12-31-2013**

Name of foundation TeamCFA Foundation		<b>A Employer identification number</b> 26-2778821	
Number and street (or P O box number if mail is not delivered to street address) Room/suite 817 E Todd Drive		<b>B Telephone number (see instructions)</b> (480) 820-2479	
City or town, state or province, country, and ZIP or foreign postal code Tempe, AZ 85283		<b>C</b> If exemption application is pending, check here <input type="checkbox"/>	
<b>G</b> Check all that apply <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input checked="" type="checkbox"/> Address change <input type="checkbox"/> Name change		<b>D 1.</b> Foreign organizations, check here <input type="checkbox"/> <b>2.</b> Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>	
<b>H</b> Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		<b>E</b> If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>	
<b>I</b> Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 874,993		<b>F</b> If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>	
<b>J</b> Accounting method <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis.)			

**Part I Analysis of Revenue and Expenses** (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))

	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
--	------------------------------------	---------------------------	-------------------------	---

<b>Revenue</b>	<b>1</b> Contributions, gifts, grants, etc., received (attach schedule)	3,490,767		
	<b>2</b> Check <input type="checkbox"/> if the foundation is <b>not</b> required to attach Sch B			
	<b>3</b> Interest on savings and temporary cash investments			
	<b>4</b> Dividends and interest from securities . . . . .			
	<b>5a</b> Gross rents . . . . .			
	<b>b</b> Net rental income or (loss) _____			
	<b>6a</b> Net gain or (loss) from sale of assets not on line 10			
	<b>b</b> Gross sales price for all assets on line 6a _____			
	<b>7</b> Capital gain net income (from Part IV, line 2) . . . . .		0	
	<b>8</b> Net short-term capital gain . . . . .		0	
	<b>9</b> Income modifications . . . . .			
	<b>10a</b> Gross sales less returns and allowances			
	<b>b</b> Less Cost of goods sold . . . . .			
	<b>c</b> Gross profit or (loss) (attach schedule) . . . . .			
	<b>11</b> Other income (attach schedule) . . . . .			
	<b>12 Total.</b> Add lines 1 through 11 . . . . .	3,490,767	0	0

<b>Operating and Administrative Expenses</b>	<b>13</b> Compensation of officers, directors, trustees, etc	160,000	0	0
	<b>14</b> Other employee salaries and wages . . . . .	83,967	0	83,967
	<b>15</b> Pension plans, employee benefits . . . . .	28,259	0	944
	<b>16a</b> Legal fees (attach schedule) . . . . .	12,235	0	0
	<b>b</b> Accounting fees (attach schedule) . . . . .	38,549	0	0
	<b>c</b> Other professional fees (attach schedule) . . . . .	33,040	0	33,040
	<b>17</b> Interest . . . . .			
	<b>18</b> Taxes (attach schedule) (see instructions)	15,878	0	5,465
	<b>19</b> Depreciation (attach schedule) and depletion . . . . .			
	<b>20</b> Occupancy . . . . .	5,526	0	0
	<b>21</b> Travel, conferences, and meetings . . . . .	476,112	0	452,306
	<b>22</b> Printing and publications . . . . .	11,358	0	11,358
	<b>23</b> Other expenses (attach schedule) . . . . .	1,005,940	0	982,252
	<b>24 Total operating and administrative expenses.</b> Add lines 13 through 23 . . . . .	1,870,864	0	1,569,332
	<b>25</b> Contributions, gifts, grants paid . . . . .	1,320,617		1,320,617
	<b>26 Total expenses and disbursements.</b> Add lines 24 and 25	3,191,481	0	2,889,949

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)			
		Beginning of year (a) Book Value	End of year (b) Book Value (c) Fair Market Value		
Assets	1	Cash—non-interest-bearing . . . . .	518,166	474,993	474,993
	2	Savings and temporary cash investments . . . . .			
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	4	Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	5	Grants receivable . . . . .			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions) . . . . .		400,000	400,000
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____			
	8	Inventories for sale or use . . . . .			
	9	Prepaid expenses and deferred charges . . . . .	40,000		
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule) . . . . .			
	c	Investments—corporate bonds (attach schedule) . . . . .			
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans . . . . .			
	13	Investments—other (attach schedule) . . . . .			
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
15	Other assets (describe ▶ _____)				
16	<b>Total assets</b> (to be completed by all filers—see the instructions Also, see page 1, item I)	558,166	874,993	874,993	
Liabilities	17	Accounts payable and accrued expenses . . . . .	16,474	31,415	
	18	Grants payable . . . . .			
	19	Deferred revenue . . . . .			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule) . . . . .			
	22	Other liabilities (describe ▶ _____)	0	2,600	
23	<b>Total liabilities</b> (add lines 17 through 22) . . . . .	16,474	34,015		
Net Assets or Fund Balances	<b>Foundations that follow SFAS 117, check here</b> ▶ <input type="checkbox"/>				
	<b>and complete lines 24 through 26 and lines 30 and 31.</b>				
	24	Unrestricted . . . . .			
	25	Temporarily restricted . . . . .			
	26	Permanently restricted . . . . .			
	<b>Foundations that do not follow SFAS 117, check here</b> ▶ <input checked="" type="checkbox"/>				
	<b>and complete lines 27 through 31.</b>				
27	Capital stock, trust principal, or current funds . . . . .	0	0		
28	Paid-in or capital surplus, or land, bldg, and equipment fund	0	0		
29	Retained earnings, accumulated income, endowment, or other funds	541,692	840,978		
30	<b>Total net assets or fund balances</b> (see page 17 of the instructions) . . . . .	541,692	840,978		
31	<b>Total liabilities and net assets/fund balances</b> (see page 17 of the instructions) . . . . .	558,166	874,993		

**Part III Analysis of Changes in Net Assets or Fund Balances**

1	Total net assets or fund balances at beginning of year—Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return) . . . . .	1	541,692
2	Enter amount from Part I, line 27a . . . . .	2	299,286
3	Other increases not included in line 2 (itemize) ▶ _____	3	0
4	Add lines 1, 2, and 3 . . . . .	4	840,978
5	Decreases not included in line 2 (itemize) ▶ _____	5	0
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 . . . . .	6	840,978

**Part IV Capital Gains and Losses for Tax on Investment Income**

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo, day, yr)	(d) Date sold (mo, day, yr)
<b>1a</b>				
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)	
<b>a</b>				
<b>b</b>				
<b>c</b>				
<b>d</b>				
<b>e</b>				
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69				(i) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any		
<b>a</b>				
<b>b</b>				
<b>c</b>				
<b>d</b>				
<b>e</b>				
<b>2</b>	Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }		<b>2</b>
<b>3</b>	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8	{ If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8 }		<b>3</b>

**Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income**

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income)

If section 4940(d)(2) applies, leave this part blank

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?  Yes  No  
 If "Yes," the foundation does not qualify under section 4940(e) Do not complete this part

**1** Enter the appropriate amount in each column for each year, see page 18 of the instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))	
2012				
2011				
2010				
2009				
2008				
<b>2</b>	Total of line 1, column (d).			<b>2</b>
<b>3</b>	Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years			<b>3</b>
<b>4</b>	Enter the net value of noncharitable-use assets for 2013 from Part X, line 5.			<b>4</b>
<b>5</b>	Multiply line 4 by line 3.			<b>5</b>
<b>6</b>	Enter 1% of net investment income (1% of Part I, line 27b).			<b>6</b>
<b>7</b>	Add lines 5 and 6.			<b>7</b>
<b>8</b>	Enter qualifying distributions from Part XII, line 4.			<b>8</b>

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See the Part VI instructions

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)

Table with 11 rows for excise tax calculations. Includes sections 1a through 11 with descriptions and numerical values in columns.

Part VII-A Statements Regarding Activities

Table with 10 rows for activity statements. Includes sections 1a through 10 with Yes/No columns and detailed descriptions of activities.

Part VII-A Statements Regarding Activities (continued)

11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions). . . . . 11 No
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions) . . . . . 12 No
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address www.teamcfa.org 13 Yes
14 The books are in care of Tisha Crisler Telephone no (480) 820-2479 Located at 817 E Todd Dr Tempe AZ ZIP+4 85283
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 -Check here . . . . . 15
16 At any time during calendar year 2013, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? 16 Yes No

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.
1a During the year did the foundation (either directly or indirectly)
(1) Engage in the sale or exchange, or leasing of property with a disqualified person? Yes No
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? Yes No
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? Yes No
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? Yes No
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? Yes No
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days ). Yes No
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? 1b
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2013? 1c No
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))
a At the end of tax year 2013, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2013? Yes No
If "Yes," list the years 20\_\_, 20\_\_, 20\_\_, 20\_\_
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement-see instructions) . . . . . 2b
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here 20\_\_, 20\_\_, 20\_\_, 20\_\_
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? Yes No
b If "Yes," did it have excess business holdings in 2013 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2013.). . . . . 3b
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 4a No
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2013? 4b No

**Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)**

**5a** During the year did the foundation pay or incur any amount to

**(1)** Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?  Yes  No

**(2)** Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?  Yes  No

**(3)** Provide a grant to an individual for travel, study, or other similar purposes?  Yes  No

**(4)** Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see instructions).  Yes  No

**(5)** Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?  Yes  No

**b** If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?  Yes  No  
 Organizations relying on a current notice regarding disaster assistance check here.  Yes  No

**c** If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?  Yes  No  
 If "Yes," attach the statement required by Regulations section 53.4945–5(d).

**6a** Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?  Yes  No

**b** Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?  Yes  No  
 If "Yes" to 6b, file Form 8870.

**7a** At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?  Yes  No

**b** If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?  Yes  No

**Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**

**1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).**

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
See Additional Data Table				

**2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."**

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				

**Total** number of other employees paid over \$50,000.  Yes  No 0

**Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**

**3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".**

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
ImageINK LLC 929 NW 19th Ave Portland, OR 97209	Marketing	202,853
Copius Creative 411 SW 6th Ave Portland, OR 97204	Website maintenance and support	153,232
Too Many Sneakers 17460 Blue Heron Dr Lake Oswego, OR 97034	Audio and visual support	50,539
<b>Total</b> number of others receiving over \$50,000 for professional services. . . . .		0

**Part IX-A Summary of Direct Charitable Activities**

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.

	Expenses
<b>1</b> Provide local board governance assistance, instructional programming, marketing, technology and financial support for the growing Team CFA network of Challenge Foundation Academy (CFA) charter schools in IN, AZ and NC that are implementing the Core Knowledge academic curriculum	878,608
<b>2</b> Marketing Provide school by school customized marketing materials, logos, stationary and websites connecting each school to the Team CFA network and promote communication through the distribution of the Connect CFA Magazine that highlights news and developments across the network for parents, students, school staff and board members	475,867
<b>3</b> National Conference Conduct an annual conference for the Team CFA schools that features training workshops on the academic, business and governance facets of operating a CFA charter school over 275 attendees	420,554
<b>4</b> School Growth Recruit, Train and place CFA school directors through a Team CFA fellows school based training program and provide financial support for the school directors in the startup phase of their new CFA schools	386,583

**Part IX-B Summary of Program-Related Investments (see instructions)**

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount	
<b>1</b> 		
<b>2</b> 		
All other program-related investments See page 24 of the instructions		
<b>3</b> 		
<b>Total.</b> Add lines 1 through 3 . . . . .		0

**Part X Minimum Investment Return** (All domestic foundations must complete this part. Foreign foundations, see instructions.)

<b>1</b>	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
<b>a</b>	Average monthly fair market value of securities. . . . .	<b>1a</b>	0
<b>b</b>	Average of monthly cash balances. . . . .	<b>1b</b>	496,580
<b>c</b>	Fair market value of all other assets (see instructions). . . . .	<b>1c</b>	0
<b>d</b>	<b>Total</b> (add lines 1a, b, and c). . . . .	<b>1d</b>	496,580
<b>e</b>	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation). . . . .	<b>1e</b>	0
<b>2</b>	Acquisition indebtedness applicable to line 1 assets. . . . .	<b>2</b>	0
<b>3</b>	Subtract line 2 from line 1d. . . . .	<b>3</b>	496,580
<b>4</b>	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions). . . . .	<b>4</b>	7,449
<b>5</b>	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3 Enter here and on Part V, line 4	<b>5</b>	489,131
<b>6</b>	<b>Minimum investment return.</b> Enter 5% of line 5. . . . .	<b>6</b>	24,457

**Part XI Distributable Amount** (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here  and do not complete this part.)

<b>1</b>	Minimum investment return from Part X, line 6. . . . .	<b>1</b>	
<b>2a</b>	Tax on investment income for 2013 from Part VI, line 5. . . . .	<b>2a</b>	
<b>b</b>	Income tax for 2013 (This does not include the tax from Part VI ). . . . .	<b>2b</b>	
<b>c</b>	Add lines 2a and 2b. . . . .	<b>2c</b>	
<b>3</b>	Distributable amount before adjustments Subtract line 2c from line 1. . . . .	<b>3</b>	
<b>4</b>	Recoveries of amounts treated as qualifying distributions. . . . .	<b>4</b>	
<b>5</b>	Add lines 3 and 4. . . . .	<b>5</b>	
<b>6</b>	Deduction from distributable amount (see instructions). . . . .	<b>6</b>	
<b>7</b>	<b>Distributable amount</b> as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1. . . . .	<b>7</b>	

**Part XII Qualifying Distributions** (see instructions)

<b>1</b>	Amounts paid (including administrative expenses) to accomplish charitable, etc , purposes		
<b>a</b>	Expenses, contributions, gifts, etc —total from Part I, column (d), line 26. . . . .	<b>1a</b>	2,889,949
<b>b</b>	Program-related investments—total from Part IX-B. . . . .	<b>1b</b>	0
<b>2</b>	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes. . . . .	<b>2</b>	
<b>3</b>	Amounts set aside for specific charitable projects that satisfy the		
<b>a</b>	Suitability test (prior IRS approval required). . . . .	<b>3a</b>	
<b>b</b>	Cash distribution test (attach the required schedule). . . . .	<b>3b</b>	
<b>4</b>	<b>Qualifying distributions.</b> Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	<b>4</b>	2,889,949
<b>5</b>	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see instructions). . . . .	<b>5</b>	0
<b>6</b>	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4. . . . .	<b>6</b>	2,889,949

**Note:** The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years



**Part XIII Undistributed Income** (see instructions)

	(a) Corpus	(b) Years prior to 2012	(c) 2012	(d) 2013
<b>1</b> Distributable amount for 2013 from Part XI, line 7				0
<b>2</b> Undistributed income, if any, as of the end of 2013				
<b>a</b> Enter amount for 2012 only. . . . .			0	
<b>b</b> Total for prior years 20____, 20____, 20____		0		
<b>3</b> Excess distributions carryover, if any, to 2013				
<b>a</b> From 2008. . . . .				
<b>b</b> From 2009. . . . .				
<b>c</b> From 2010. . . . .			299,328	
<b>d</b> From 2011. . . . .			1,081,281	
<b>e</b> From 2012. . . . .				
<b>f</b> Total of lines 3a through e. . . . .	1,380,609			
<b>4</b> Qualifying distributions for 2013 from Part XII, line 4 ▶ \$ _____				
<b>a</b> Applied to 2012, but not more than line 2a			0	
<b>b</b> Applied to undistributed income of prior years (Election required—see instructions). . . . .		0		
<b>c</b> Treated as distributions out of corpus (Election required—see instructions). . . . .	0			
<b>d</b> Applied to 2013 distributable amount. . . . .				0
<b>e</b> Remaining amount distributed out of corpus	0			
<b>5</b> Excess distributions carryover applied to 2013 (If an amount appears in column (d), the same amount must be shown in column (a).)	0			0
<b>6</b> Enter the net total of each column as indicated below:				
<b>a</b> Corpus Add lines 3f, 4c, and 4e Subtract line 5	1,380,609			
<b>b</b> Prior years' undistributed income Subtract line 4b from line 2b. . . . .		0		
<b>c</b> Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed. . . . .		0		
<b>d</b> Subtract line 6c from line 6b Taxable amount—see instructions. . . . .		0		
<b>e</b> Undistributed income for 2012 Subtract line 4a from line 2a Taxable amount—see instructions. . . . .			0	
<b>f</b> Undistributed income for 2013 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2014. . . . .				0
<b>7</b> Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions). . . . .	0			
<b>8</b> Excess distributions carryover from 2008 not applied on line 5 or line 7 (see instructions). . . . .	0			
<b>9</b> Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a. . . . .	1,380,609			
<b>10</b> Analysis of line 9				
<b>a</b> Excess from 2009. . . . .				
<b>b</b> Excess from 2010. . . . .			299,328	
<b>c</b> Excess from 2011. . . . .			1,081,281	
<b>d</b> Excess from 2012. . . . .				
<b>e</b> Excess from 2013. . . . .				

**Part XIV Private Operating Foundations** (see instructions and Part VII-A, question 9)

**1a** If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2013, enter the date of the ruling. . . . . 2010-04-20

**b** Check box to indicate whether the organization is a private operating foundation described in section  4942(j)(3) or  4942(j)(5)

	Tax year				(e) Total
	(a) 2013	(b) 2012	(c) 2011	(d) 2010	
<b>2a</b> Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed . . . . .	0	0	0	0	0
<b>b</b> 85% of line 2a . . . . .	0	0	0	0	0
<b>c</b> Qualifying distributions from Part XII, line 4 for each year listed . . . . .	2,889,949	1,772,381	1,380,609	299,328	6,342,267
<b>d</b> Amounts included in line 2c not used directly for active conduct of exempt activities . . . . .	0	0	0	0	0
<b>e</b> Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c . . . . .	2,889,949	1,772,381	1,380,609	299,328	6,342,267
<b>3</b> Complete 3a, b, or c for the alternative test relied upon					
<b>a</b> "Assets" alternative test—enter					
<b>(1)</b> Value of all assets . . . . .	874,993	558,167			1,433,160
<b>(2)</b> Value of assets qualifying under section 4942(j)(3)(B)(i) . . . . .					0
<b>b</b> "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed. . . . .					0
<b>c</b> "Support" alternative test—enter					
<b>(1)</b> Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties) . . . . .	3,490,767	2,609,439			6,100,206
<b>(2)</b> Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii). . . . .					0
<b>(3)</b> Largest amount of support from an exempt organization . . . . .	3,290,767	2,359,439			5,650,206
<b>(4)</b> Gross investment income . . . . .					0

**Part XV Supplementary Information (Complete this part only if the organization had \$5,000 or more in assets at any time during the year—see instructions.)**

**1 Information Regarding Foundation Managers:**

**a** List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000) (See section 507(d)(2) )

**b** List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest

**2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:**

Check here  if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds If the foundation makes gifts, grants, etc (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d

**a** The name, address, and telephone number of the person to whom applications should be addressed

**b** The form in which applications should be submitted and information and materials they should include

**c** Any submission deadlines

**d** Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors

**Part XV Supplementary Information** (continued)

**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i> See Additional Data Table				
<b>Total . . . . .</b>				<b>▶ 3a</b> 1,320,617
<b>b</b> <i>Approved for future payment</i>				
<b>Total . . . . .</b>				<b>▶ 3b</b> 0





**Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation**

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
Joseph A Maimone 817 E Todd Dr Tempe, AZ 85283	Board Member 3 00	25,000	0	0
William M Steinbrook Jr 817 E Todd Dr Tempe, AZ 85283	Treasurer 10 00	0	0	0
Ruppert Reinstadler 817 E Todd Dr Tempe, AZ 85283	Board Member 3 00	0	0	0
Fritz S Steiger 817 E Todd Dr Tempe, AZ 85283	Board Member 3 00	0	0	0
Ryan Stowers 817 E Todd Dr Tempe, AZ 85283	Board Member 3 00	0	0	0
Abigail Thernstrom 817 E Todd Dr Tempe, AZ 85283	Board Member 3 00	0	0	0
Fred Eckert 817 E Todd Dr Tempe, AZ 85283	Board President 3 00	0	0	0
Rob Kremer 01630 SW Carey Ln Portland, OR 97219	Executive Director 50 00	160,000	27,315	0

**Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a Paid during the year</b>				
Aristotle Preparatory Academy 2461 Arty Ave Charlotte, NC 28208		501 (c) (3)	Conference grant, technology grant, start up grant, start up loan to grant	90,690
Brevard Academy 299 Andante Lane Brevard, NC 28712		501 (c) (3)	Conference grant, technology grant	71,403
Center for Education Reform 4825 Bethesda Ave Ste 220 Bethesda, MD 20814		501 (c) (3)	Donation	50,000
CFA of Arizona 817 E Todd Dr Tempe, AZ 85283		501 (c) (3)	Fellows grant	76,176
Challenge Foundation Academy - Indianapolis PMB 302 1900 Preston Rd 267 Plano, TX 75093		501 (c) (3)	Fellows grant, conference grant	77,736
Cornerstone Charter Academy 2535 New Garden E Greensboro, NC 27455		501 (c) (3)	Conference grant, technology grant, start up loan to grant	116,535
Hirsch Academy 6535 E Osborn Rd Ste 401 Scottsdale, AZ 85251		501 (c) (3)	Start up loan to grant, technology grant	34,190
Lake Lure Classical Academy 2520 Memorial Hwy Lake Lure, NC 28746		501 (c) (3)	Conference grant, technology grant	73,983
Millennium Charter Academy 500 Old Springs Rd Mt Airy, NC 27030		501 (c) (3)	Conference grant, start-up loan to grant	3,500
NC Alliance for Public Charter Schools 512 St Marys St Raleigh, NC 27603		501 (c) (3)	Donation	12,500
New Dimensions J500 Lenoir Rd Morganton, NC 28655		501 (c) (3)	Fellows grant, conference grant, start-up loan to grant, technology grant	217,180
Piedmont Community Charter School 119 E 2nd Ave Gastonia, NC 28052		501 (c) (3)	Fellows grant, conference grant, technology grant	286,880
Pioneer Preparatory School 6510 W Indian School Road Phoenix, AZ 85033		501 (c) (3)	Fellows grant, conference grant	75,254
Ridgeline Academy 33625 N North Valley Parkway Phoenix, AZ 85085		501 (c) (3)	Conference grant	26,000
Thomas Jefferson Classical Academy 1110 S Broadway St Forest City, NC 28043		501 (c) (3)	Fellows grant, conference grant	108,090
<b>Total . . . . .</b>			<b>▶ 3a</b>	1,320,617

**Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
Ella Randolph Memorial Fund PO Box 489 Shelby, NC 28151		501 (c) (3)	Donation	500
<b>Total . . . . .</b>				<b>3a</b> 1,320,617



**Schedule B**  
(Form 990, 990-EZ, or 990-PF)  
Department of the Treasury  
Internal Revenue Service

**Schedule of Contributors**  
▶ Attach to Form 990, 990-EZ, or 990-PF.  
▶ Information about Schedule B (Form 990, 990-EZ, or 990-PF) and its instructions is at [www.irs.gov/form990](http://www.irs.gov/form990).

OMB No 1545-0047  
**2013**

**Name of the organization**  
TeamCFA Foundation

**Employer identification number**  
26-2778821

**Organization type** (check one)

- Filers of:**                      **Section:**
- Form 990 or 990-EZ             501(c)( ) (enter number) organization
- 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
- 527 political organization
- Form 990-PF                       501(c)(3) exempt private foundation
- 4947(a)(1) nonexempt charitable trust treated as a private foundation
- 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.  
**Note.** Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

**General Rule**

- For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II.

**Special Rules**

- For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33<sup>1</sup>/<sub>3</sub>% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi) and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use *exclusively* for religious, charitable, etc., purposes, but these contributions did not total more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions of \$5,000 or more during the year. . . . . ▶ \$ \_\_\_\_\_

**Caution.** An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990, or check the box on line H of its Form 990-EZ or on its Form 990PF, Part I, line 2, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

**Name of organization**  
TeamCFA Foundation

**Employer identification number**  
26-2778821

**Part I Contributors** (see instructions) Use duplicate copies of Part I if additional space is needed

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	Challenge Foundation 1900 Preston RD Suite 267 Plano, TX 75093	\$ 3,290,767	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions )
2	Louis Calder Foundation 125 Elm Street New Canaan, CT 06840	\$ 200,000	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions )
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions )
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions )
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions )
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions )

**Name of organization**  
TeamCFA Foundation

**Employer identification number**  
26-2778821

**Part II** **Noncash Property** (see instructions) Use duplicate copies of Part II if additional space is needed

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____	\$ _____	_____
_____	_____ _____ _____	\$ _____	_____
_____	_____ _____ _____	\$ _____	_____
_____	_____ _____ _____	\$ _____	_____
_____	_____ _____ _____	\$ _____	_____
_____	_____ _____ _____	\$ _____	_____
_____	_____ _____ _____	\$ _____	_____
_____	_____ _____ _____	\$ _____	_____

<b>Name of organization</b> TeamCFA Foundation	<b>Employer identification number</b> 26-2778821
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**Part III** Exclusively religious, charitable, etc., individual contributions to section 501(c)(7), (8), or (10) organizations that total more than \$1,000 for the year. Complete columns (a) through (e) and the following line entry  
 For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year (Enter this information once See instructions ) ▶ \$  
 Use duplicate copies of Part III if additional space is needed

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—	_____ _____ _____	_____ _____ _____	_____ _____ _____
<b>(e) Transfer of gift</b>			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
_____ _____		_____ _____ _____	
—	_____ _____ _____	_____ _____ _____	_____ _____ _____
<b>(e) Transfer of gift</b>			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
_____ _____		_____ _____ _____	
—	_____ _____ _____	_____ _____ _____	_____ _____ _____
<b>(e) Transfer of gift</b>			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
_____ _____		_____ _____ _____	
—	_____ _____ _____	_____ _____ _____	_____ _____ _____
<b>(e) Transfer of gift</b>			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
_____ _____		_____ _____ _____	

## TY 2013 Accounting Fees Schedule

**Name:** TeamCFA Foundation

**EIN:** 26-2778821

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Accounting and tax return preparation	38,549	0	0	0

## TY 2013 Legal Fees Schedule

**Name:** TeamCFA Foundation

**EIN:** 26-2778821

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Legal fees	12,235	0	0	0

**TY 2013 Other Expenses Schedule****Name:** TeamCFA Foundation**EIN:** 26-2778821

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Conferences and meetings	15,741	0	0	15,741
Insurance	8,878	0	0	0
Technology and audio visual costs	65,524	0	0	65,524
Miscellaneous expense	21,308	0	0	21,308
Licenses and permits	850	0	0	0
Marketing and software	483,335	0	0	483,335
Dues and subscriptions	4,601	0	0	4,601
Supplies	8,603	0	0	0
Telephone	5,332	0	0	0
School startup costs	25,993	0	0	25,993
Bank fees	25	0	0	0
Board and committee stipends	365,750	0	0	365,750

### TY 2013 Other Liabilities Schedule

**Name:** TeamCFA Foundation

**EIN:** 26-2778821

Description	Beginning of Year - Book Value	End of Year - Book Value
Payroll liabilities	0	2,600



### TY 2013 Other Professional Fees Schedule

**Name:** TeamCFA Foundation

**EIN:** 26-2778821

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Contracted & consulting services	33,040	0	0	33,040

### TY 2013 Substantial Contributors Schedule

**Name:** TeamCFA Foundation

**EIN:** 26-2778821

Name	Address
Challenge Foundation	1900 Preston RD Suite 267 Plano, TX 75093

# TY 2013 Taxes Schedule

**Name:** TeamCFA Foundation

**EIN:** 26-2778821

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Miscellaneous taxes	85	0	0	0
Payroll taxes	15,793	0	0	5,465

## Attachment 24

### Litigations

TeamCFA has not been involved in any litigation or arbitration proceedings. While some of our network schools have joined, as Plaintiffs, in litigation efforts to produce funding equality for charter schools, the TeamCFA network schools are locally autonomous private nonprofit corporations and therefore, TeamCFA has not been involved in such efforts. Further, other than these equity lawsuits, TeamCFA is not aware of any litigation or arbitration proceedings that have involved any of the TeamCFA network schools.