



# **ALLEGIANT PREP**

ACADEMY

A Proposed K-8 Charter School for Indianapolis, IN

**Respectfully submitted by Rick Anderson on behalf of the  
Allegiant Preparatory Academy Founding Team**

Rick Anderson

Alyssa Howard

Janice Howard

Tony Pearson

Brianna Saunders

Charles Schlegel

Clifton Snorten

Keeanna Warren

March 26, 2017

Allegiant Preparatory Academy educates all students in grades K-8 with rigorous academics, character development, and a commitment to community necessary for college success and a life of positive action.

Exhibit B

**Proposal Overview**

The applicant group's **designated representative** 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).

**Name of proposed Charter School:** Allegiant Preparatory Academy Charter School dba "Allegiant Prep"

**Proposed Charter School location:\*** Indianapolis, IN

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

**School district of proposed location:** Indianapolis Public Schools

**Legal name of group applying for Charter:** Allegiant Preparatory, Inc.

**Designated representative:** Rick Anderson, Lead Founder, Proposed Head of School Building Excellent Schools

**Contact Information (Phone & Email):** 317.619.9464 randerson@buildingexcellentschools.org

**Planned opening year for the school:** Fall 2018

**Model or focus of proposed school:** Allegiant Prep is proposed K-8 college prep charter school for the Westside of Indianapolis  
(e.g., arts, college prep, dual-language, etc.)

**Proposed Grade Levels and Student Enrollment**

Indicate the grade levels the school intends to serve. Specify both the planned and maximum number of enrolled students by grade level for each year.

Academic Year	Grade Levels	Student Enrollment (Planned/Maximum)
Year 1	K-1	120
Year 2	K-2	180
Year 3	K-3	240
Year 4	K-4	300
Year 5	K-5	360
At Capacity	K-8	540

**Target student population (if any):** 46222 Zip Code

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

Yes  No

If yes, identify the authorizer(s): NA

Planned submission date(s): NA

Please list the number of previous submissions (including withdrawn submissions) for request to authorize any charter school(s) over the past five years, as required under IC § 20-24-3-4.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

Number of Previous Submissions: NA

Authorizer(s):

Submission date(s): NA

Signature of Applicant's Designated Representative

  
Signature

3/22/17

Date



<b>TABLE OF CONTENTS</b>	
<b>EXECUTIVE SUMMARY</b>	
Mission and Vision	1
Educational Need and Target Population	1
Community Engagement	2
Education Plan / School Design	2
Vision of Growth	5
Governance and Leadership	5
<b>SECTION I: EVIDENCE OF CAPACITY</b>	
Founding Group	6
Governance	8
School Leader and Leadership Team	12
<b>SECTION II: SCHOOL DESIGN</b>	
Education Plan	14
Innovation	14
Curriculum and Instructional Design	15
Pupil Performance Standards	19
School Calendar and Schedule	20
School Culture	21
Supplemental Programming	27
Special Populations and At-Risk Students	29
Student Recruitment and Enrollment	33
Student Discipline	34
Parents and Community	35
Performance Management	37
<b>SECTION III: IMPLEMENTATION PLAN</b>	
Legal Status and Governing Documents	40
Human Capital	40
School Staffing Structure	40
School Leadership and Staff Hiring, Management and Evaluation	40
Professional Development	42
Start-Up and Operations	45
Facility Plan	45
Budget and Finance	47



**REQUIRED ATTACHMENTS**

1. Founding Group Resumes
2. Board Member Information
3. Decision Making Authority
4. Course Scope and Sequence
5. Academic and Exit Standards
6. School Calendar and Schedule
7. Enrollment Policy
8. Student Discipline Policy
9. Evidence of Support from Community Partners
10. Governance Documents
11. Statement of Assurances
12. Organizational Charts
13. Start-Up Plan
14. Insurance Coverage
15. Budget and Staffing Workbook
16. Budget Narrative
17. (If Applicable) Existing Non-Profit Entity Financials – Not Applicable.
18. Entire Application

## EXECUTIVE SUMMARY

### MISSION AND VISION

---

**Mission.** Allegiant Preparatory Academy Charter School educates all students in grades K-8 with rigorous academics, character development, and a commitment to community necessary for college success and a life of positive action.

**Vision.** Allegiant Preparatory Academy Charter School (“Allegiant Prep”) is a K-8 charter school, proposed to serve students residing within and around the 46222 Indianapolis zip code. With two cohorts of 30 Kindergarten and two cohorts of 30 Grade 1 students in 2018 (four classes of 30 students each), Allegiant Prep will add one grade per year as a slow growth school until the school reaches capacity, with 540 K-8 students in 2026. A slow growth model allows us to best ensure student recruitment and enrollment, rigorous curriculum development in support of ambitious academic goals, and strategic development of strong teachers, teacher leaders, and leadership team members to propel the success of our mission. Aligned to rigorous national and state standards, and in response to profound local community need, Allegiant Prep is deeply committed to providing a high-quality public school option to students and families in Indianapolis. Allegiant Prep will provide this high-quality education driven by three imperatives: (1) **Rigorous Academics**, (2) **Character Development**, and (3) **Community**.

**Rigorous Academics.** With elevated and clear learning expectations, all students can master rigorous academic objectives. Indiana Academic Standards inform all curriculum development, and teachers use a variety of assessment tools to track student progress throughout the year and use data from to target whole group, small group, and individual student instruction. Targeted instruction strategically supports student mastery of content and skill in all subject areas.

**Character Development.** Through joy, structure, and high expectations, students learn to grow through life-sustaining and community-building values. Teachers outline explicit procedures and expectations for how students should engage in every component of their school day, ensuring that students know precisely what to expect and what is expected of them. Our school core values affirm our belief in our students and our community: Respect, Responsibility, Integrity, Perseverance, and Unity. We invest students in our core values by explicitly teaching students what each value means in action at all grade levels, as well as frequently honoring and celebrating these values throughout our school community.

**Community.** Students will be physically, emotionally, socially, and intellectually safe. Invested in the values of our community, students will have strategic opportunities to serve others within our local zip code. Families and community stakeholders will be encouraged to join and participate. Through service, students will realize the power that lies inside of them to influence positive change for others and in their community, and will understand and begin to live out components of a life of positive action.

### EDUCATIONAL NEEDS AND TARGET POPULATION

---

The Indiana Charter School Board’s vision is that students throughout our state have access to high-performing public schools. Allegiant Prep is a proposed charter school for Indianapolis, a city similarly committed to ensuring that all students have access to high performing public schools. Community stakeholders continue to mobilize for the development and attraction of proven school models focused on high academic and culture expectations for students and adults, bringing innovative approaches to serve the needs of the community. We are aligned with these goals and initiatives, and support the Indiana

Charter School Board’s mission of holding schools accountable for demonstrating exceptional academic gains that will lay the foundation for student success in college and professional careers.

Indianapolis Public Schools (IPS) has a history of low performance and has been ranked a “D” for the last two years. The 2015-2016 ISTEP+ results confirm that IPS students lag far behind their state counterparts in English Language Arts and math proficiency:  $\approx$  40.7% of students passed the ELA exam, compared to 66.1% statewide; 32.6% passed the math exam, compared to 58.9% statewide. Literacy rates remain chronically low, and the research is clear: students not reading proficiently by the end of 3<sup>rd</sup> grade are four times more likely to leave high school without a diploma versus peers reading proficiently by the end of 3<sup>rd</sup> grade.<sup>1</sup> Students with insufficient literacy skills are more likely to enter the workforce illiterate, lacking skills needed to secure employment. Families of students in the 46222 zip code and surrounding areas are confined to sending their students to failing schools and do not have a quality school option that will ensure their children’s academic success and put them on a path to college and life success.

## **COMMUNITY ENGAGEMENT**

---

With the support of a high capacity, deeply invested Founding Team, Lead Founder and Proposed Head of School Rick Anderson, a native of Indianapolis, has worked strategically and proactively to invest community members on the Westside in the mission and vision of Allegiant Prep. As we work to be a part of the solution to ensure all students have access to a quality education, we have engaged multiple community stakeholders in this process. During the planning phase, we have engaged families, community leaders, and non-for profit leaders to garner support and understand challenges of the local community, and we have used this input to best inform our school model. As the proposed Head of School, Mr. Anderson has met with the Westside Educational Task Force and actively attended Neighborhood Association meetings to learn from community members passionate about building and sustaining community assets. He has held Community Discussions, and volunteered at early child care education centers to better understand the family and academic need for Allegiant Prep. Genuinely submerging ourselves into the daily lives of community members on the Westside has built our credibility and provided context that continues to inform the mission and design of Allegiant Prep.

## **EDUCATION PLAN/SCHOOL DESIGN**

---

A focused environment of clear and high expectations best ensures student achievement starting in Kindergarten, and a college preparatory elementary school puts all students on a path to high school and college success. A culture of joy and rigor equips and inspires students to dream and work their way into college and lead a life of positive action. High-quality instruction in the early elementary years ensures students have the academic foundation needed to engage in rigorous content in middle school and high school. Research shows that students that experience success early in school maintain higher levels of achievement during their academic career.<sup>2</sup> Research on the DNA of successful charter schools informs our educational plan. "The 2011 Fryer Paper"<sup>3</sup> identifies five attributes of effective schools: (1) frequent teacher feedback, (2) the use of data to guide instruction, (3) high-dosage tutoring, (4) increased instructional time and (5) high expectations. All five are core elements of our design. Evidence-based research coupled with examining excellent schools has built the scope and depth of school design. Students that excel in college and life do so because of high expectations and rigorous instruction, not

---

<sup>1</sup> "The Campaign for Grade Level Reading Study Links 3<sup>rd</sup> Grade Reading Poverty and HS Graduation Comments." *The Campaign for Grade-Level Reading*. N.p., n.d. Web. 04 Sept. 2016.

<sup>2</sup> "Starting School: Effective Transitions." Abstract. ECRP. Vol 3 No 2.. N.p., n.d. Web. 04 Sept. 2016.

<sup>3</sup> Dobbie, Will, and Roland Fryer. "Getting Beneath the Veil of Effective Schools: Evidence from New York City." Web. November 2011.



because of luck. Within an intentional warm-strict environment, adults challenge, support, and encourage all students to own individual academic and life learning. The following priorities are the framework upon which we have designed our academic program.

### **1. Consistent and effective leadership critical to the sustained success of the school.**

Consistent and effective leadership is accountable for addressing and supporting adults, students, and stakeholders, investing them in the mission and vision, supporting them in execution of the vision, and providing guidance and direction towards ambitious goals. Leadership creates systems that support adult success and student success. Leadership grows adults, identifying teachers who demonstrate the mindset and effectiveness needed to lead outside of the classroom. Student academic success is directly aligned to adult leadership focused on student academic success now, while planning for success in the future. Leadership will come from a competent, mission-aligned Board that will provide oversight and support and ensure accountability for executing on the charter, and from the Head of School. Lead Founder and proposed Head of School Rick Anderson has been supported during the application process through Building Excellent Schools (BES). BES trains high-capacity individuals to take on the demanding and urgent work of leading high-achieving, college preparatory urban charter schools. School leadership will be further strengthened via BES Follow-on Support through the second year of operation.

### **2. Data from rigorous assessments inform instruction.**

We use frequent, rigorous assessments to inform instruction. Data allows us to determine when and how an objective needs to be re-taught and which students need targeted supports. Protocols and tools used by high-performing charter schools and Bambrick-Santoyo's *Driven by Data*<sup>4</sup> inform our assessment selection and cycle for data analysis and action planning. Nationally normed and internally created assessments are given at regular intervals throughout the year to inform student growth and mastery. All K-8 students take the NWEA Measures of Academic Progress (MAP) three times per year to measure longitudinal growth and performance in reading and math. All K-3 students take the Strategic Teaching and Evaluation of Progress (STEP) literacy assessment four times per year. This assessment will drive literacy groupings and target reading skills to ensure all students are at or above grade level in reading by the end of their third grade year at Allegiant Prep. Internal K-8 Math and Writing Interim Assessments are given each unit to measure if standards that have been taught have been mastered. We administer all Indiana Required State Mandated Assessments, including the IREAD-3 in 3<sup>rd</sup> Grade and ISTEP+ in Grades 3-8 in English/Language Arts, Mathematics, Science, and Social Studies.

### **3. Intense focus on literacy starts in Kindergarten.**

Allegiant Prep is responsible for ensuring every student develops the foundational literacy skills needed to read, write, comprehend, and demonstrate learning on or above grade level. Many students who will attend Allegiant Prep will come from low-income backgrounds. Research indicates that students living in poverty entering Kindergarten have heard 30 million fewer words than affluent peers.<sup>5</sup> Therefore, a massive vocabulary gap will already exist before our students enroll. To combat this gap, Kindergarten students receive 200 minutes of daily literacy instruction, and they have a vocabulary and print-rich environment where they are held accountable for using "college words" and speaking in complete sentences. Through daily literacy instruction approached through multiple modalities, and a focus on vocabulary development, every student will be reading at or above grade level by the end of Third Grade.

---

<sup>4</sup> Bambrick-Santoyo, Paul. (2010). *Driven by Data*. San Francisco, CA: Jossey-Bass.

<sup>5</sup> Hart, Betty, and Rinsely, Todd. "The Early Catastrophe: The 30 Million Word Gap by Age 3," *American Educator*. Spring 2003.



#### 4. High quality teachers are key to student academic achievement.

Evidence shows that teacher quality is the most significant indicator of a student's academic performance.<sup>6</sup> We intentionally focus on: (1) recruiting competent and mission-aligned classroom leaders; (2) implementing a system of regular feedback and weekly professional development; (3) and retaining and promoting teacher leaders to assume more responsibility in addition to teaching or outside of the classroom. We use local and national networks to recruit top teacher talent: Teach For America, Indianapolis Teaching Fellows, local colleges and universities, out-of-state college recruitment fairs, and online employment websites. The multi-step interview process includes: phone interviews, video interviews, written responses, in-person interviews, sample lessons, re-teaching of lessons after feedback, and reference checks. Upon hiring, we know great teacher leaders are developed, and not born. Therefore, teachers are observed at least twice per week; real-time coaching efficiently grows teachers in the moment. Each observation is followed by a coaching session with leadership. During the hiring process and teacher orientation, leadership explains the rationale for why we observe teachers and what observation and feedback looks like. Weekly whole-school professional development (PD) is held every Friday for 2 hours, allowing whole group practice-based, grade level, and content team PD. Retaining and promoting teachers is essential to executing on our long-term mission and vision, and the process of how we assess and develop leaders will impact the long-term quality of leadership and the school.<sup>7</sup> On day one, leadership will focus on providing strategic opportunities for teachers who have demonstrated effectiveness and can take on more responsibility. Growing effective teacher-leaders and leadership team members will support our overall success and growth over time, and is a key responsibility of leadership, supported further through the national support of Building Excellent Schools.

#### 5. Establishing a community of family investment and inclusion is a must.

Students are more engaged and invested in school expectations when families reinforce the school's expectations at home. Before students' first day with us, families participate in individual and small group meetings with the Head of School, during which the Head of School learns more about the student and the family's expectations for them. At the end of this meeting, the Head of School and parent(s)/guardian(s) sign a Community Contract identifying responsibilities for which both parties will be accountable to ensure the student's success. As a school we are accountable for ensuring students are safe, working hard within a joyful and structured environment, and receiving well-planned, rigorous instruction every day. Families agree that students will be on time every day, in full uniform with required materials, and turning in Lifework (homework) signed by an adult each morning. The Indiana Charter School Board requires that charter schools create a "strong plan for family and community engagement."<sup>8</sup> At Allegiant Prep one of our five core values is "Unity" and we believe it is our responsibility to unite every adult in the building and every student's family under our mission and vision to ensure the best interest of the student is at the center of every decision made. We accomplish this in four ways: student and family meetings, frequent communication, University nights, and responsiveness. Before the first day of school each family and student participate in a 45-minute **One-on-One Meeting** with the Head of School. During this time the family is given an opportunity to share the future they envision for their child. The Head of School outlines the mission and vision of the school and how the

---

<sup>6</sup> William L. Saunders and June C. Rivers, *Cumulative and Residual Effects of Teachers on Future Student Academic Achievement*, University of Tennessee Value-Added Research and Assessment Center, 1996, p. 6.

<sup>7</sup> Leadership Matters What the Research Says about the Importance of Principal Leadership."

[Http://www.naesp.org/sites/default/files/LeadershipMatters.pdf](http://www.naesp.org/sites/default/files/LeadershipMatters.pdf). National Association of Secondary School Principals, n.d. Web. 5 Sept. 2016.

<sup>8</sup> <https://www.in.gov/icsb/2395.htm>.



academic and character development program will ensure their student is on the path to success in college and life. The student(s) will earn the opportunity to sign this contract at the end of the first week of school when they officially become members of the Allegiant Prep community. Families receive **Frequent Communication** around students' academic and behavioral performance and progress. Student updates are primarily communicated in four ways: daily Lifework, progress reports, report cards, and parent teacher conferences. K-8 students receive Lifework (homework) each day to ensure additional practice and reinforcement of concepts and skills. In our **Lower Academy** (K-4), the cover page of the **Lifework** packet displays teacher comments and the student's behavioral color for the day and requires nightly family signature. Students in our **Upper Academy** (5-8) Academy receive **Weekly 'Paychecks' and Grade Logs**. Each family receives their teacher's phone numbers and can call teachers until 6:30pm during the week to ask clarifying questions. Students receive three (3) **Report Cards** and **Parent/Teacher Conferences** are held at the same time so each family has an opportunity to discuss students' current academic performance. We host six (6) **University Nights** during the year. Families are encouraged to attend to learn skills to support students and receive school specific updates. Some topics include: Helping your student become a better reader, assisting your student with lifework, and Tips on incorporating math into everyday life. All students and staff participate in one **Service Project** annually in the local community. Students families are encouraged to attend and assist. On the last Wednesday of each month, students and families receive a monthly **Allegiant Prep Newsletter**. One Saturday per month families are invited to meet in the morning for **Coffee and Donuts with Head of School**. This hour is a time for families to ask general questions, offer comments on the quality of education their student is receiving, build relationships, and support the needs of our families and the growth of our school.

## **VISION OF GROWTH**

---

We open with 60 Kindergarteners and 60 First Graders, using a slow growth model, growing one grade each year until the school is at full capacity with 540 students. To maintain a smaller size shown critical for the success of our target community, and academic and culture differentiation developmentally appropriate for students based on their grade, the school will be comprised of a Lower (K-4), and Upper (5-8) Academy. Slow growth and our academy structure best allow us to establish and grow a strong student and adult culture grounded in high expectations for rigorous instruction, character development, and teacher/ school leader development. We will backfill students in K-8 in accordance with Indiana State law.

## **GOVERNANCE AND LEADERSHIP**

---

The proposed Head of School Rick Anderson is a highly respected and successful teacher and school leader and is supported by a dynamic group of high capacity professionals who will serve as the Founding Governing Board. The entire Founding Team is unified by an unwavering commitment to ensure families have access to a rigorous, structured, and joyful college preparatory school that will motivate students to work hard and propel student success through implementation of high behavior and academic expectations. The Founding Team adamantly believes that demographics do not determine destiny, and that all students, regardless of background or life circumstances, have the ability to excel in school, college, and life. With a shared sense of responsibility, the Founding Team is unified in ensuring a high-quality K-8 education for all students in our city and particularly on Indianapolis' Westside. The Founding Team will govern the school and ensure it fulfills its academic promises outlined within this petition.

## SECTION I: EVIDENCE OF CAPACITY

### FOUNDING GROUP MEMBERSHIP

**1. Primary Members.** The Founding Team is comprised of a diverse set of accomplished professionals committed to serving in Indianapolis. Every individual is united behind the mission of Allegiant Prep to provide K-8 students on the Westside with a rigorous, structured, and joyous college preparatory education. All Resumes can be found in **Attachment 1** and all information sheets in **Attachment 2**. **Rick Anderson, Building Excellent Schools Fellow, Lead Founder, and Proposed Head of School**, brings a breadth of educational leadership to found and lead Allegiant Prep. Mr. Anderson served as the Head of School at Freedom Preparatory Academy in Memphis TN where he led over 60 teachers and 750 students in a high-performing urban charter school. Prior, he was the Dean of Students and a first and sixth grade teacher. As Dean, he developed and implemented schoolwide culture and behavioral systems, coached novice teachers, established strong relationships with students and families, and led PD. Mr. Anderson is determined to foster a community that embodies a strong academic culture and program, a culture of inclusiveness, operational effectiveness, and a commitment to college readiness within a K-8 school. A graduate of Florida Agricultural and Mechanical University, he earned his M.Ed. at Christian Brothers University. As proposed Head of School, Mr. Anderson brings expertise in: school leadership and administration; curriculum, instruction, assessments; and parent/community engagement. **Alyssa Howard, Senior Associate, Pricewaterhousecoopers**, is a CPA working in the Indianapolis Core Assurance practice. Mrs. Howard brings extensive experience in accounting, financial statement review and project management in her role serving clients with national and international operations in the industrial manufacturing, financial services, food service, and aerospace industries. She is involved in PwC's youth education and diversity initiatives, participating in financial planning and mentoring in the Indianapolis area. Mrs. Howard holds a B.A. in Accounting, magna cum laude, from Howard University and will bring financial oversight and compliance expertise to the Governing Board. **Janice Howard, Senior Business Analyst-HR, Angie's List**, is a Senior Business Analyst supporting HR and Payroll at Angie's List. With 20+ years of executive experience, Ms. Howard has an extensive background in all areas of HR, including Recruiting, Employee Relations, Benefits, Compensation, Performance Management, and Human Resource Information Systems. She holds a B.S. in Business Information Systems and M.B.A with a specialization in Human Resources from Indiana Wesleyan University and will bring a wealth of experience in finance and human resources to the Governing Board. **Tony Pearson, Associate General Counsel, Indiana University Health**, is an Associate General Counsel with Indiana University Health. Mr. Pearson primarily provides legal counsel on transactional matters for the hospital system's physician group and affiliate organizations. He supports 30+ clinical subspecialties, assisting physician leadership with employment agreements, medical directorships, and professional service contracts. Mr. Pearson is also a Lieutenant in the U.S. Navy Reserve, where he serves as Assistant Officer-In-Charge for Expeditionary Medical Facility - Detachment R. Mr. Pearson earned his B.S. in Biology and M.P.H with a concentration in Health Policy and Management from Florida Agricultural and Mechanical University. Mr. Pearson earned his J.D. with a concentration in Health Law from the Indiana University McKinney School of Law, and brings strong legal expertise to the Governing Board. **Brianna Saunders, Associate Director of Community Engagement**, is a proud native of Indianapolis with a heart for servant leadership and a strong sense of responsibility for volunteerism as evidenced by her work with the United Way, Second Helpings, and NCAA Youth Clinics. Having spent 10+ years in the nonprofit sector, she is the Associate Director of Community Engagement for the Indianapolis Power & Light Company. Prior, she served in the same capacity, leading community engagement efforts for the Alzheimer's Association and the American



Cancer Society. Mrs. Saunders received her B.S. in Business Management and M.A. in Public Affairs from Indiana Wesleyan University, and she brings a rich skill set, including extensive development and event planning experience, to the Governing Board. **Charlie Schlegel, Educational Consultant**, currently serves as an independent education consultant, working on several projects with Mass Insight Education, Marian University, and school districts in Indianapolis and Minneapolis. Prior, Mr. Schlegel served as Superintendent of the Community Charter Network (CCN), a small group of public charter schools in Indianapolis that serve nearly 1200 students, K-12. Prior to leading CCN, Mr. Schlegel served as an upper elementary school teacher in New Orleans, starting through Teach For America. Mr. Schlegel served as Principal of *Wayland Middle School*, a public school just west of Boston, and the *Avondale Meadows Academy*, a K-5 charter school in Indianapolis. Mr. Schlegel earned his B.A. in History from the University of Michigan, M.A.P. from Stanford University, and Ed.D. from Harvard University, and brings strong educational leadership to the Governing Board. **Clifton Snorten, Office Manager, U.S. House of Representatives**, is the Scheduler/Office Manager for Congressman André Carson in Indiana's 7th Congressional District. Within the Indianapolis community, Mr. Snorten also serves as the Project Director for the All Souls CDF Freedom School program and Board President of the Bloom Project, Inc. Previously, he worked as the Assistant Director within Student Affairs at Ball State University. Mr. Snorten holds a B.S. in English Education from Indiana University and M.A. in Student Affairs Administration in Higher Education from Ball State University, and he brings 8+ years of Governance experience to the Governing Board. **Keeanna Warren, Director, The Excel Center Meadows**, is the Director of The Excel Center Meadows in Indianapolis. Prior, Mrs. Warren served as graduate coach, lead teacher, and college transition counselor for The Excel Center. She also served as an elementary school teacher for Washington Township and math and elementary school teacher for Andrew J. Brown Academy. Mrs. Warren has a passion to ensure all students in Indianapolis have access to a quality education. Mrs. Warren received a B.A. in Sociology from Purdue University and M.S. in teaching from Marian University, where she was a part of the Turnaround School Leadership program, and she brings knowledge in academic programming, administration, and performance management to the Governing Board. **2.** Please see **Figure 1: Founding Team Experience and Qualifications**

<b>Figure 1: Founding Team Expertise and Experience</b>		
<b>Founding Group</b>	<b>Role</b>	<b>Area of Expertise</b>
<b>Rick Anderson</b> Building Excellent Schools Fellow, Lead Founder, and Proposed Head of School	Lead Founder and Proposed Head of School	School Leadership, Administration, Adult/Student Management, Curriculum and Instruction, Parent and community engagement, Performance management
<b>Janice Howard</b> Senior Business Analyst-HR, Angie's List	Proposed Board Member	Human Resources, Strategic Planning, Performance management
<b>Alyssa Howard</b> Senior Associate, Pricewaterhousecoopers	Proposed Board Member	Financial Compliance, Financial Audit, Management
<b>Tony Pearson</b> Associate General Counsel, Indiana University Health	Proposed Board Member	Legal Compliance, Management, Board Governance
<b>Brianna Saunders</b> Associate Director of Community Engagement, Alzheimer's Association	Proposed Board Member	Community Engagement, Management, Program Evaluation, Performance Management

<b>Charlie Schlegel</b> Educational Consultant	Proposed Board Member	School Leadership, Charter School Network Management, Curriculum & Instruction, Performance management, Board Governance
<b>Clifton Snorten</b> Office Manager, U.S. House of Representatives	Proposed Board Member	Strategic Planning, Community Engagement, Board Governance, Administration
<b>Keeanna Warren</b> Director, The Excel Center-Meadows	Proposed Board Member	School Leadership, Administration, Curriculum & Instruction, Assessment, Performance Management, Family Engagement

**Founding Group’s Circumstances and Motivations.** Rick Anderson has spent the last six years working as a school leader and teacher, most recently as Head of School at Freedom Preparatory Academy, a successful urban charter school in Memphis, TN, as well as a school founded and continuously supported through Building Excellent Schools. Raised in Indianapolis, Mr. Anderson brings his track record of effectiveness back to his hometown to found and lead Allegiant Prep on the city’s Westside. As an educator and a father, he is inspired by the work ahead to ensure families and children on the Westside have access to a quality, college preparatory education starting in Kindergarten. To ensure a quality school, Mr. Anderson is supported and joined by a dynamic and diverse Founding Team, that came together in deep support of our mission in the fall of 2016. As outlined in **Figure 1**, this group brings the necessary professional capacities to assume stewardship of public funds and oversee a high-quality charter public school. All members demonstrate firm alignment with the mission of the school, capacity to invest sweat equity particularly crucial during the start-up period, and a proven commitment to and professional track record within our city. Since December 2016, the Founding Team has received weekly communication on work towards goals, met monthly, attended a full-day founding board retreat, engaged in extensive community outreach, leveraged personal and professional networks, and actively participated in supporting Mr. Anderson in developing the charter application to ensure a successful opening of Allegiant Prep. With a founding group of eight (8) members, seven will serve on the Governing Board and one will serve as Head of School. Post authorization we will continue to expand the Board to bring on individuals with fund development and facilities/real-estate experience. The Founding Team will leverage personal and professional networks to identify potential additional members who are mission-aligned and committed to excellent educational outcomes for students on the Westside; the Board will bring those members on in accordance with our Bylaws. Post-authorization, all members of the Founding Team will transition to the Governing Board, except Rick Anderson who will serve as the Head of School.

**3. Resumes.** All resumes can be found in **Attachment 1**.

**GOVERNANCE**

**4. Governance Structure and Composition.** Allegiant Prep will be governed by a diverse group of high capacity professionals that will collectively constitute the Board of Directors. The Board’s primary responsibility is to provide effective governance and oversight to the school, and hold the school accountable to the promises outlined in the charter. The board will oversee financial health, ensure regulatory compliance, and oversee organizational health and academic success. The Board will establish policies, and assess them on an annual basis. The Board will set compensation for, hire, support, and evaluate the Head of School, who will be the only member of the staff to report to the Board. The Board will delegate all day-to-day management of the school to the Head of School, who will be responsible for executing and following established policies such as fiscal and school personnel policies. The Board will consist of no fewer than (7) and no more than fifteen (15) members; maintain an odd number of members



for voting purposes; function according to its Bylaws and Conflict of Interest Policy; include elected officers of Chair, Vice Chair, Secretary, and Treasurer; and use the committee structure outlined below. The Founding Team has eight members, seven of whom will serve on the Governing Board and one we intend to name as Head of School. This group has actively participated in supporting Mr. Anderson developing the charter application and school design. Resumes can be found in **Attachment 1**, and Board Member Information Sheets in **Attachment 2**. Allegiant Prep Board members bring a diverse set of experiences, skill-sets, gender, age, and racial and cultural backgrounds. The Board collectively has expertise in School Leadership, Board Governance, Human Resources, Law, Management, Strategic Planning, Community Engagement, Performance Management, Curriculum and Instruction, Finance, Law and Compliance. The diversity of perspectives and experience will provide the Board with the competencies necessary to provide strong Governance and sound oversight. Each member of Allegiant Prep’s Founding Board believes that demographics do not determine destiny and are fully committed to the mission of each student being successful in college and life. Where we have a deficit in a specific skill-set, we will seek out an individual to join the Board, or serve on a committee. When recruiting new individuals to the Board we will: Identify specific skill-set needed for the Board; Ensure alignment to mission and educational philosophy; Ensure passion for and commitment to students on the Westside of Indianapolis; Ensure personal/professional capacity to participate in meetings, retreats, and related events; Ensure willingness to leverage personal and professional networks on behalf of the school; Screen for ability to work well with others; and Ensure ability to prioritize school’s goals over personal agenda. The Board will include four elected positions to meet specific organizational needs, outlined in **Figure 2**.

<b>Figure 2: Responsibilities of Board Elected Positions</b>	
<b>Chair of the Board</b>	<b>Vice Chair</b>
<ul style="list-style-type: none"> <li>• Presides over all meetings of the Board and other meetings as required</li> <li>• Coordinates with Head of School, other officers, and Committee chairs to develop Board agendas</li> <li>• Disseminates information to Board members.</li> <li>• Reviews organizational efficacy and sets organizational</li> <li>• Appoints Committee chairs</li> <li>• Monitors efficacy of Board’s governing processes; addresses deficits of Board operations</li> </ul>	<ul style="list-style-type: none"> <li>• In Chair’s absence, presides over Board meetings; serves as ex officio member of committees</li> <li>• Works with Chair to assist in developing Board agendas</li> <li>• Advises Chair on appointing volunteers to key leadership positions</li> <li>• Supports and challenges Chair in responsibilities to ensure organizational priorities and governance concerns are addressed</li> <li>• Conducts duties as delegated by the Chair</li> </ul>
<b>Treasurer</b>	<b>Secretary</b>
<ul style="list-style-type: none"> <li>• Serves as Chair of the Finance Committee</li> <li>• Ensures school complies with federal, state, and other statutory reporting requirements</li> <li>• Works with administration to ensure complete financial records available if requested by auditors</li> <li>• Reviews monthly financial statements prepared by school’s administration</li> <li>• Ensures required financial reports are prepared accurately and in a timely manner</li> <li>• Reports to full Board regularly to ensure Board understands financial health of the organization</li> <li>• Co-signs any purchases exceeding \$10,000 for the school</li> </ul>	<ul style="list-style-type: none"> <li>• Certifies and keeps both hard copy and electronic copy of up-to-date bylaws</li> <li>• Records official minutes of all meetings; minutes record location, start and end time of meeting, whether regular or special, how called, how notice was given, names of those present or represented at the meeting, and the proceedings thereof</li> <li>• Keeps copies of agendas and minutes of meetings and committees, ensures these documents are available at the school’s main office</li> <li>• Ensures that all notices are duly given as described in the bylaws or as required by law</li> </ul>

	<ul style="list-style-type: none"> <li>• Maintains Board records including agendas and minutes, and ensures timely appropriate notice for meetings, per Indiana’s Public Access Laws</li> <li>• Performs other duties incidental to Office of Secretary</li> </ul>
--	--

The Head of School is responsible for hiring, developing, and managing staff, overseeing the academic program, including development and implementation of the curriculum and our assessment systems, and managing school funds. The Head of School will report directly to the Board of Directors. The Board will be responsible for monitoring and evaluating the Head of School, and will complete an annual written evaluation that will be kept in the Head of School’s personnel file. The Board will continue to receive Board Governance training from Building Excellent Schools, and will participate in any State Mandated Board trainings. Prior to submission of this petition, each Founding Board member received training and engaged in dialogue around *Charter School Board University*<sup>9</sup>, developing a clear understanding of the difference between management and governance. Post-authorization, the BES Director of Board Governance will lead a full-day strategic planning meeting with the Board. At the end of each year, the Governance Committee will lead a self-evaluation of the Board to identify strengths, weaknesses, and areas of opportunities to become a more effective Board. Each Board member will participate in these self-evaluations, which will be collected by the Governance Committee and shared with the full Board. During the annual Board retreat, the Governance Committee will share findings with the entire Board, and discuss shifts that need to be made to grow. Any substantial changes or changes to the By-laws will be voted on and implemented during the retreat. The Founding Team has met monthly since December 2016, and communicated weekly to ensure the development of a strong school design, build community awareness/support, and plan for the opening of the school in 2018. Post authorization, the Board will continue to meet monthly, and when needed with more frequency to ensure preparedness for the first operational year. Monthly meetings will be held in a public space accessible to community members, in accordance with **Indiana Open Meeting Law**. The Board Secretary will record all Board meeting minutes; these minutes will be made available to the public on our website. At future Board meetings, examples of topics to be discussed include: creation of organizational dashboards, protocol for monitoring and evaluating the Head of School for planning year and beyond, updates on work towards meeting student enrollment goal, and fund development. Post-authorization, Building Excellent Schools (BES) and the BES Director of Board Governance will continue to provide support to the Board and Head of School. A sample **Board Meeting Agenda** is in **Attachment 10**. The Board of Directors uses a **Committee Structure** composed of Board members and community members. These committees include, but are not limited to, Governance, Academic Achievement, Finance and Facility, and Development. Additional committees may be created based on a unique need of the school. The Governance Committee is the only group that is exclusively comprised of Board members. Each committee will meet monthly and present formal reports to the Board. The **Governance Committee** ensures the Board is compliant with all rules and regulations, and maintaining and developing healthy Board membership. The Governance Committee is responsible for on-boarding all new members to the Board. The **Finance and Facility Committee** provides financial oversight, ensures the school has the funds necessary to support its academic and enrichment program. During the planning year, this committee will focus on supporting the Head of School in securing a facility that is up-to-code for school opening. The **Development Committee** leads external relationships with individuals and organizations to reach fund development goals and financial resources that go

---

<sup>9</sup> Carpenter, B. L. (2007). *Charter School Board University: an introduction to effective charter school governance*. Mt. Pleasant, MI: National Charter Schools Institute.

beyond our core program. The **Academic Achievement Committee** supports the Head of School in analyzing achievement data, ensuring the school is on track to meet academic goals outlined in the charter and that clear academic metrics are in place for the Board. **Ethics and Conflict of Interest.** As a school, we receive public dollars to fund our academic program. As recipients of public funds, the Board ensures we are operating with integrity, as good and proper stewards of public funds. Our Conflict of Interest Policy was developed with support from Building Excellent Schools and legal review within the State of Indiana. Every member of the Board will receive annual training and be required to annually sign our Conflict of Interest Policy. New members to the Board will review and sign this policy during their orientation and onboarding process. As the school potentially engages in contract and negotiation discussions, the Board will review the Conflict of Interest. A Board member who has a perceived or real conflict will recuse him/herself from discussion and vote. The Board will adopt a Code of Ethics, which will include a Confidentiality and Nepotism Policy to protect the school's interest the public's trust. See **Attachment 10** for our Conflict of Interest Policy and Code of Ethics. **5. Advisory Bodies.** We believe in the unified work of school staff, families, and community stakeholders to ensure the success and well-being of each student. The **Allegiant Prep Parent Advisory Council** will be formed during our planning year. This group will include families/guardians and community members aligned with the mission and vision of the school. The Council will be tasked with supporting the school in two ways: providing feedback to school leadership on the ongoing development of the school, and volunteering within the school and at school sponsored events. The group will: provide support with the distribution and collection of Annual Surveys for all families during the school year; assist in preparation for University Nights and Coffee and Donut meetings held monthly with school leadership and staff; and provide input to the Head of School on the ongoing growth of the school. The school will provide multiple volunteer opportunities to members including: assisting with student material preparation; attending field lessons (Field Trips); and speaking with potential new families. School leadership will confer with the Parent Advisory Council to inform decisions that impact multiple stakeholders. While the Parent Advisory Council provides invaluable support to the school, the Head of School is the individual who is responsible for making all final school based decisions. Post authorization we also will develop the **Allegiant Prep Professional Advisory Council.** These individuals will be committed to the success of the school, but may not be able to commit to serving on the Board of Directors. This group will be tasked with supporting the school in three ways: utilizing a specific skill set on behalf of the school; providing their expertise to the Board as needed; and leveraging their network to further awareness of the school and our ongoing outreach work on the Westside. During the planning year, the Board and our proposed Head of School Rick Anderson will invite trusted individuals to join our Professional Advisory Council to provide further support and ensure that we have everything we need to successfully open our doors to families and students in the Fall of 2018. **6. Grievance Process.** The majority of staff and family concerns will be handled at the school level, with appropriate parties, and if needed, with the Head of School. In the instance of a direct family complaint to the Board, they would be directed to communicate this to the Head of School and attempt to resolve the issue at the school level. If the parent remains unsatisfied, s/he can bring formal complaint, and any ethical, legal, or safety issues would be heard by the Board as a formal complaint in accordance with our **Formal Complaint Policy.** The Policy is outlined in our Student and Family Handbook, given to each family in their home language at the beginning of the school year during Individual Family Meetings, student enrollment, and Family Orientation. The Board is legally responsible for following the Complaint Policy when responding to formal complaints. Individuals or parties filing a formal complaint/or objection must do so in writing one week prior to the next Board meeting. The formal written complaint/objection must be submitted via mail service, delivered to the school in a sealed envelope, or email (submitted complaints will be



addressed on an as-needed basis). The Board will respond by the following regularly scheduled public Board meeting. The Board will work with the Head of School to ensure every effort is made to address and resolve each matter to the satisfaction of the individual or group presenting the complaint. The Board reserves the right to direct the Head of School to engage all parties involved, and work to resolve the concern. In writing, the Board would communicate a determination on the complaint/objection.

## **SCHOOL LEADER AND LEADERSHIP TEAM**

---

**7. Identified Head of School and Leadership Training.** Rick Anderson, Lead Founder and proposed Head of School, considers education to be his life's work, and thus has committed his personal and professional career to effectively educating children living in low-income communities. In Memphis, TN, Mr. Anderson started his educational career as a first-grade teacher. Through high expectations for student behavior and learning, over 90% of his students were reading on or above grade level by the end of the year. Mr. Anderson went on to serve in school leadership at Freedom Preparatory Academy, a BES school and well respected network of charter school in Memphis, TN (for Letter of Support, please see **Attachment 9**). He first served as Dean of Students for 6-8<sup>th</sup> grade, where he developed and implemented a school-wide cultural and behavioral standard. He coached novice educators, communicated with students' families, developed objectives and training for weekly staff PD, and implemented that training. Mr. Anderson's next step at Freedom Prep was as Head of School for 6-8<sup>th</sup> grade, then Head of School for K-5<sup>th</sup> grade. In these roles, he was responsible for hiring, training, supporting and managing 60 teachers and the safety and learning of over 750 students. Mr. Anderson's qualifications can be found in **Attachment 1**. Mr. Anderson is humbled to be a Fellow with Building Excellent Schools (BES), and as a Fellow he has accessed and analyzed 40+ high performing charter schools across the country. BES training includes: organizational leadership, budgeting and financial management, curriculum and assessment development, facility acquisition and operations, and school culture planning and implementation. He has completed Leadership Residency at Great Lakes Academy in Chicago, IL (for Letter of Support, please see **Attachment 9**).<sup>10</sup> In the coming months, he will continue to study high performing schools as well as complete another Leadership Residency that entails access to and experience with expansive summer professional development for staff and onboarding of families and students at the start of the year. Mr. Anderson's school leadership experience and BES Fellowship have given him the training necessary to found and lead a high-quality, college preparatory K-8 school where students will engage in rigorous instruction, reach ambitious academic goals, and grow as responsible human beings. **8. Staffing and Compensation Plan Post Authorization.** Upon charter approval, the Board intends to hire Mr. Anderson as full-time Head of School to continue leading the development of Allegiant Prep. At the end of August 2017, Mr. Anderson will receive his final stipend from BES; at that time we will receive a Walton Family Foundation planning grant of \$325,000. The grant will allow compensation until the 2018 academic year begins and we begin operating on public revenue. The WFF is a Building Excellent Schools partner; Commitment Letter is in **Attachment 16**. **9. Responsibilities and Qualifications of School's Administrative Team.** Effective leadership is the number one factor that leads to a school's success. School leadership is solely responsible for hiring the team, equipping adults, evaluating and using data to improve the school culture and academic program to ensure that all academic outcome goals are met. The Year 1 Allegiant Prep Leadership team includes the Head of School and Operations Manager. As we add a grade level each

---

<sup>10</sup> The BES Leadership Residency is an intensive, hands-on experience in a high-performing urban charter school. Mr. Anderson spent January 2017 at Great Lakes Academy led by Katherine Myers-Crum, a 2012 BES Fellow. In its first-year, Great Lakes Academy served 120 Kindergarten and first grade students on Chicago's South Side; 85% were reading below grade-level upon enrollment. Nearly 100% of Kindergarten and 85% of first graders were reading at or above grade-level by the end of the year.



year (until we reach full capacity in 2025), our Leadership team will grow to support more staff and more students. Allegiant Prep Leadership Team members believe firmly in the mission and vision of Allegiant Prep, including that all students can and will be successful in college and life. Additionally, they will demonstrate a growth mindset, respect for students, families, and staff, and have a track record of success in urban education. **Figure 3** outlines our Leadership Team structure through full enrollment. Each member of the Leadership Team is charged with internalizing, projecting, and holding staff accountable to Allegiant Prep expectations. Leadership Team members are responsible for operating with our core values of Respect, Responsibility, Integrity, Perseverance, and Unity at all times. The **Head of School** manages the Leadership Team and reports to the Board, ensuring the school’s academic achievement, values-based culture, and fiscal health. The **Operations Manager** manages all operational details, vendors, contractors, and day-to-day school wide systems. The **Director of Operations** manages full front office and operational staff within the school. The **Lower Dean of Curriculum and Instruction** leads curriculum and assessment development and coaching of teachers for grades K-4. The **Upper Dean of Curriculum and Instruction** leads curriculum and assessment development and coaching of teachers for grades 5-8. The **Student Supports Coordinator** oversees Special Education, coordinates all services and IEPs for students with special needs, ensures proper recordkeeping and compliance, and manages two full time SPED Teachers. The **Lower Dean of Students** oversees a positive, structured, safe school culture, ensures school wide culture system is executed with fidelity, organizes culturally diverse experiences for students for grades K-4. The **Upper Dean of Students** oversees a positive, structured, safe school culture, ensures school wide culture system is executed with fidelity, organizes culturally diverse experiences for students for grades 5-8. We anticipate filling several roles internally before looking externally, and will follow our hiring process as described in **Section III: Human Capital**.

<b>Figure 3: Allegiant Prep Leadership Team</b>			
Academic Year	Grade Span	Enrollment	Leadership Team
2018-2019	K-1	120	Head of School, Operations Manager
2019-2020	K-2	180	Head of School, Operations Manager, Lower Dean of Curriculum and Instruction (DCI)
2020-2021	K-3	240	Head of School, Operations Manager, Lower DCI,
2021-2022	K-4	300	Head of School, Operations Manager, Lower DCI, Student Supports Coordinator
2022-2023	K-5	360	Head of School, Operations Manager, Lower DCI, Upper DCI, Student Supports Coordinator, Lower Dean of Students (DOS)
2023-2024	K-6	420	Head of School, Operations Manager, Lower DCI, Upper DCI, Student Supports Coordinator, Lower DOS, Upper DOS
2024-2025	K-7	480	Head of School, Operations Manager, Lower DCI, Upper DCI, Student Supports Coordinator, Lower DOS, Upper DOS
2025-2026	K-8	540	Head of School, Director of Operations, Lower DCI, Upper DCI, Student Supports Coordinator, Lower DOS, Upper DOS

**10. Educational Services.** Allegiant Preparatory Academy plans to work with external educational services as needed. Those currently identified are Building Excellent Schools, The Indiana Network of Independent Schools (INISchools), and IFF.

**11. School and Governing Board Decision-Making.** Please see **Attachment 3, Exhibit D**.

## SECTION II: SCHOOL DESIGN

### EDUCATION PLAN

**Innovation.** Allegiant Prep prepares all K-8 students to attend and graduate from the college of their choice. We will provide a unique college preparatory education option currently unavailable to students and families on the Westside of Indianapolis. Our school model is based on the design of proven instructional models at other high performing schools across the country, specifically, BES school Purpose Preparatory Academy in Nashville, TN where over 94% of K-2 students in 2016 were reading at or above grade level based on the nationally normed STEP Literacy assessment.<sup>11</sup> School design innovations include: an extended school day, two teachers in class during literacy instruction, prioritized and expanded focus on literacy and math instruction, public speaking, core values aligned to character development, community service, and, starting in the Upper Academy (5-8), a technology course that ensures students are technologically literate before the start of high school. These innovations inform our curriculum selection, instruction, culture, systems and routines, hiring, professional development, and character development. **Extended School Year and Day.** Our calendar has 184 instructional days and we will have an extended school day from 7:30am - 4:00pm, including over 400 minutes of instruction daily, Monday-Thursday. Each Friday we have an abbreviated schedule: student dismissal is at 2:00pm, allowing for 2 hours of weekly professional development for staff. Students engage in 300 minutes of instruction between 8:00am and 2:00pm each Friday. When combining additional school days and minutes, Allegiant Prep students receive over 30 more days of instruction each academic year, compared with that provided within traditional school models. Research continues to show that initiatives that expand learning time facilitate school and classroom innovation to enhance teaching and learning.<sup>12</sup> **Two Teachers During Literacy Instruction.** During Literacy, both the classroom teacher and a Reading teacher deliver small group instruction. The classroom teacher is responsible for Reading Comprehension/Guided Reading and the co-teacher executes Phonics instruction using a station-rotation model. Our daily schedule includes differentiated small group instruction to support the general classroom and to best instruct ELL and SPED students during small group literacy rotations. See **Attachment 6** for daily classroom schedule. **Focus on Literacy and Math.** Within our extended school day model, students receive 200 minutes of Literacy and 110 minutes of Math instruction each day. Within this extended time, teachers execute school-wide systems and routines to ensure daily transitions (i.e. in class transitions, restroom breaks, transition to lunch, and transition to electives) are efficient and do not encroach on instructional time, and use timers as a part of instruction to maximize student time on task. Peak performers in every industry, including sports, business, and education, follow routines to focus on the things that matter most. Students, too, benefit from the use of thoroughly taught, well-established classroom routines.<sup>13</sup> **Public Speaking.** As a college preparatory K-8 school, Allegiant Prep focuses on building academic skills as well as character habits to set students up for success in high school, college, and life. One key lever identified for career and college success is the ability to articulate clear ideas and present those ideas to a larger audience. The Association for Supervision and Curriculum Development (ASCD) has created a list of student habits that lead to success. One habit includes students learning how to *think and communicate with clarity and precision*.<sup>14</sup> Starting in Kindergarten, students are required to speak in a “college voice” when addressing a teacher or their peers. In literacy and math, students are taught Habits of Discussion, starting with the

<sup>11</sup> Purpose Prep Results. (n.d.). <http://www.purposeprep.org/purpose-prep-results>.

<sup>12</sup> Rocha, E. (2007). *Choosing More Time for Students The What, Why, and How of Expanded Learning*. Center for American Progress, 4-6.

<sup>13</sup> “Why Routines Make Classroom Management Easier.” *Plus One Great Idea*. (2014, April 09).

<sup>14</sup> *Habits of Success*. <http://www.ascd.org/publications/educational-leadership/apr12/vol69/num07/Habits-of-Success.aspx>.



basics of sharing their thinking in complete sentences and agreeing and disagreeing with their classmates thoughtfully and clearly using scaffolded sentence stems appropriate to the grade level. In math class, we follow a Cognitively Guided Instruction (CGI) model where students explain strategies used to solve math problems with classmates. Students develop the confidence and skills of articulating themselves clearly in our Lower Academy (K-4), so that when students matriculate to our Upper Academy (5-8) they are ready to start engaging in Socratic seminars and debates where they guard and defend their interpretation of different texts. **Core Values.** Our mission concludes with a charge to our students – “live a life of positive” action - and is informed by our character development program. From the moment students walk in our doors, they learn our five (5) core values: Respect, Responsibility, Integrity, Perseverance and Unity. Adults model and explain why these values are important and model non-examples and exemplars for students. In class, teachers constantly use core values to celebrate and correct student actions. During weekly grade level **Community Circles**, teachers identify students publicly, and explain how they have been consistently displaying our core values. The goal is for students to internalize these values and apply them in both high school and college as well as at home and in the larger community. **Community Service.** Students will be invested in the values of our community and have strategic opportunities to serve others residing within the school’s zip code. All staff and students will engage in at least one community service project per year, and families and community stakeholders will be encouraged to join and participate with us. Through community service, students will realize the power that lies inside of them to influence positive change for others and in their community, and allows them to understand components of a life of positive action. **Technology.** In all grades 5-8, students will take a Technology course as an elective where they will develop critical technological literacy skills, as outlined in **Figure 5**. Our selection to offer a sequenced set of Technology courses to Upper Academy students is aligned with the work of Partnership for 21<sup>st</sup> Century Learning, a national organization committed to ensuring students have the knowledge and skills to thrive in an ever-evolving, technological world.<sup>15</sup>

**Figure 5: 5-8<sup>th</sup> Grade Technology Courses**

5 <sup>th</sup> Grade	6 <sup>th</sup> Grade	7 <sup>th</sup> Grade	8 <sup>th</sup> Grade
Word Processing, Multimedia Presentation Tools, Research Tools	Basic Operations, Spreadsheet, Website Design	Coding, App Creation, Digital Citizenship	Robotics

Our innovative model will in no way interfere with ICSB’s high accountability standards; rather, the model will allow us to deliver on ambitious academic mission and academic goals, and are therefore aligned with ICSB holding Allegiant Prep to the same high standards as all authorized schools.

## CURRICULUM AND INSTRUCTIONAL DESIGN

**1. Instructional Framework.** The mission of Allegiant Prep is to prepare all K-8 students with rigorous academics, character development, and a commitment to community necessary for college success and a life of positive action. The foundation of our instructional program is built upon a culture of high academic and behavior expectations for all students. Our instructional framework is informed by and aligned with the Indiana Academic Standards, the unique needs of students on the Westside, and proven best practices that have yielded significant student achievement results, at charter schools across the country serving a similar population of students.<sup>16</sup> **(a) Learning Environment.** Using Indiana Academic

<sup>15</sup> *Our Vision and Mission.* <http://www.p21.org/about-us/our-mission>.

<sup>16</sup> Through the BES Fellowship, Lead Founder and proposed Head of School Rick Anderson visited, studied, and developed a deep

Standards, from day one in Kindergarten students will receive the academic foundation necessary to earn their way into and graduate from a college preparatory high school and the college or university of their choice. Standards are aligned vertically across content areas to ensure a seamless transition as students matriculate from grade level to grade level. Allegiant Prep Academy will have a classroom-based instructional model by which curriculum is delivered. **(b) Class Size and Structure.** At full enrollment, Allegiant Prep will have two cohorts per grade, K-8 with 30 students per cohort, and 60 students per grade. Teachers will employ various student groupings for classroom instruction. During the Literacy blocks, there will be two teachers in each classroom to provide small group reading instruction with a 10:1 student to teacher ratio through a three-station rotation model. **(c) Overview of the Curriculum.** We provide students with high-quality instruction to build foundational academic skills and accelerate learning so that students matriculating from 8<sup>th</sup> grade are prepared for the rigors of a college preparatory high school. When selecting a curriculum, we consider the following: (a) alignment to Indiana Academic Standards; (b) degree of use in other high performing urban schools; (c) evidence of significant student achievement; (d) evidence of effectiveness with students with special needs. As a BES Fellow, Rick Anderson accessed and analyzed 40+ schools across the country. Nationally recognized schools such as Brooke Schools in Boston, MA, North Star in Newark, NJ, Great Lakes Academy in Chicago, IL, and Purpose Prep in Nashville, TN informed our curriculum decisions. College preparation begins with a solid literacy foundation; every curricular item is reviewed for grade level appropriate reading and writing skills and vocabulary development within text. **Reading lays the foundation for college success.** Curriculum is grounded in developing strong, foundational literacy skills for students. Research supports the connection between early literacy acquisition and college matriculation and preparedness. Reading skills also directly impact a student's academic life and how they perceive their educational experience.<sup>17</sup> Early reading ability predicts stronger reading comprehension ability across content.<sup>18</sup> Evidence specifically supports the "Matthew Effect" in early, strong readers: "[T]he very children who are reading well and who have good vocabularies will read more, learn more word meanings, and hence read even better."<sup>19</sup> To create this positive cycle of developing strong early literacy skills, we invest in literacy heavily, starting in Kindergarten. Teachers lead students in 200 minutes of literacy instruction daily, and infuse literacy skills into all content areas. Students engage in three 30-minute small group reading rotations, during which time two teachers work with small groups of 10 students each to isolate and master reading skills unique to the group while the third groups of 10 students work on adaptive technology individualized to their needs. Our understanding of Indiana Academic Standards coupled with our response to the specific community needs of the Westside led us to select curriculum listed in **Figure 6**. Curriculum will be evaluated annually using academic data; adjustments will be made where needed to ensure student success.

**Figure 6: Proposed K-8 Core Academic Curriculum**

Grades	Literacy	Mathematics	Science	Social Studies
K-4	<b>Reading:</b> Core Knowledge, Literacy Centers, Guided Reading/Reading	<b>Every Day Counts Math</b> (Calendar Math), <b>EngageNY</b> (Number sense, computation,	Core Knowledge	Core Knowledge

understanding of nationally recognized, high-achieving charter schools such as Brooke, North Star, and BES schools Great Lakes Academy and Purpose Preparatory. These schools serve low-income students of color and score in the top percentile on state and national assessments.

<sup>17</sup> Stanovich, Keith. "Matthew Effects in Reading." *Reading Research Quarterly* Fall. 1986.

<sup>18</sup> Cunningham, Anne E., and Keith E. Stanovich. "Early Reading Acquisition and its relation to reading experience and ability 10 years later." *Developmental Psychology*. Vol. 33 Nov. 1997; Stanovich, Keith. (2000). *Progress in Understanding reading: Scientific Foundations and New Frontiers* (1 ed.). New York, NY: Guilford Press.; Cunningham, Anne & Keith Stanovich. (2003). "Reading Can Make You Smarter." *Principal* Nov./Dec.2003.

<sup>19</sup> Ibid.; Stanovich, Keith. "Matthew Effects in Reading." *Reading Research Quarterly* Fall. 1986.

	Comprehension (internally developed) <b>Phonemic Awareness:</b> Reading Mastery <b>Writing:</b> Lucy Calkins <b>Online Learning:</b> Lexia	algebraic thinking, geometry, measurement), <b>CGI</b> (problem solving)		
5-8	<b>Reading comprehension</b> across genres (internally created), <b>Book Clubs</b> , and <b>Grammar</b>	<b>Procedures</b> (computation) and <b>Problem Solving</b> , both internally created	Internally created	Internally created

**(d) Technology Use in Instructional Delivery.** During reading rotations, students rotate in small groups between teachers and laptops. We will use Lexia (ST Math during Math block), an individualized computer program to give students on-grade-level literacy practice. Teachers can print out grade-level-equivalent reading practice for independent student work. **(e) Plans for Ensuring the School is Staffed with Highly Effective Teachers.** Allegiant Prep will comply with all state and federal requirements for “highly qualified” when hiring for each position, all related documentation (i.e. transcripts, test scores, and Indiana Department of Education Teacher assessment data) related to “highly qualified” status, and a complete background check before hiring. **2. Instructional Strategies.** With full commitment to our mission and strong student outcomes starting in year one and continuing over the life of our school, Allegiant Prep employs consistent, school-wide instructional strategies to maximize achievement. We hold a 15-day summer PD for all teachers where we introduce and practice classroom management and instructional techniques to optimize learning time for students. During Summer PD, and over the course of the school year, teachers are trained on strategies from Lemov’s *Teach Like A Champion 2.0*<sup>20</sup>, Farr’s *Teaching as Leadership*<sup>21</sup>, and Bambrick-Santoyo’s *Great Habits Great Readers*.<sup>22</sup> Numerous high performing urban charter schools in high-poverty areas similar to the Westside implement these strategies, including the Achievement First Network, Uncommon Schools, and high performing members of the BES Network, including Equitas Academy (Los Angeles, CA), Excel Academy (Boston, MA), University Prep (Denver, CO), Great Lakes Academy (Chicago, IL), and Purpose Prep (Nashville, TN). These strategies allow teachers to focus on executing rigorous, well-planned lessons as they maximize each instructional minute. We implement a variety of these strategies to ensure students are prepared for success in a college preparatory high school and beyond. **Extended School Day and School Year.** Many students will enter Kindergarten already behind more affluent peers. We have an extended school day and school year to give students more time for quality instruction. Extended learning time with students will have a high impact on academic outcomes, informed by nearly two additional years of instruction for students enrolled at Allegiant Prep from K-8. **Two-Teacher Literacy Model.** In grades K-4, students will have three 30-minute literacy rotations daily, with two rotations in a small group with a teacher. This allows for students to receive targeted phonemic and comprehension instruction, with focused teacher attention. The third literacy rotation will be a blended learning rotation, during which students will use an adaptive program, such as Lexia<sup>23</sup>, to continue building foundational reading skills. **Small Group Tutoring.** At the end of each day there is a 40-minute tutoring block reserved for students who need additional time practicing specific reading skills. **Classroom Instructional Tools.** Visible instructional tools assist students in K-4 internalize content specific strategies including anchor charts with reading strategies, vocabulary wall, sight word wall, number line, and **Habits of Discussion** prompts. When students grapple with

<sup>20</sup> Lemov, Doug. *Teach Like a Champion 2.0* 2<sup>nd</sup> ed. Vol.1. San Francisco, CA: Jossey-Bass. (2014).

<sup>21</sup> Farr, Steven. *Teaching as Leadership: The Highly Effective Teacher’s Guide to Closing the Achievement Gap*. San Francisco, CA: Jossey-Bass, 2010.

<sup>22</sup> Bambrick-Santoyo, Paul. *Great Habits, Great Readers*. San Francisco, CA: Jossey-Bass, 2013.

<sup>23</sup> *Blended Learning*. (2016, July 14). <http://www.lexialearning.com/solutions/blended-learning>.



instruction, teachers are trained to refer students to these instructional tools to solve problems. **Kinesthetic Learning.** Teachers connect physical movement to learning, to assist students in internalizing themes, definitions, and concepts. **Blended Learning.** One of the rotations during small group literacy rotations is the laptop station. Students engage in grade level, literacy skill practice unique to their reading level, as outlined above. **College Voice.** Oral and vocabulary acquisition is developed with students starting in Kindergarten. Students are taught and expected to speak in clear and complete sentences. Teachers encourage students to incorporate advanced vocabulary into academic discourse or when socializing with peers. **Data Driven Decision Making.** We use formal and informal student assessment data to determine how and when learning objectives are taught. Data provides us with insights on what specific skills students have mastered, and what skills they are still working to develop. During our 15-day **Summer Professional Development (PD)**, all staff, instructional and non-instructional, practice specific academic, behavioral, and student engagement techniques to ensure school wide consistency. In alignment with high expectations for all students, it is imperative that all staff members can hold students to these expectations with consistency and joy. Staff continues to receive training throughout the year on more advanced techniques to ensure they are continuing to grow their ability to manage and instruct students effectively. **Figure 7** outlines the instructional techniques that Allegiant Prep staff will be effective in utilizing with students from the beginning of the school year.

<b>Figure 7: Teach Like a Champion Techniques</b>			
<b>Skill</b>	<b>Type</b>	<b>Description</b>	<b>Example</b>
What To Do	Behavioral	Teacher direction explicitly states what student should be doing, to eliminate confusion and ensure all students follow the direction.	Teacher direction: I need everyone’s pencils down, silently looking at me, with hands folded on top of your desk.
Sweat the Details	Behavioral	Teacher holds students accountable for following directions, even minor details. By holding students accountable for small things, they will be less likely to commit major misbehaviors.	Teacher gives direction for class to stand up behind their chairs silently. One student stands up with hands placed on back of chair. Teacher ask students to stand up straight and to take hands off back of the chair.
Do It Again	Behavioral	When student(s) do not follow a direction, the consequence is to “Do It Again.”	Teacher gives students direction to line up silently, multiple students are whispering. Teacher stops entire class, restates direction and has class line up silently again.
100%	Behavioral & Academic	Students meet teachers’ expectations 100% of the time. When teachers give direction that every student can accomplish, the expectation is that 100% of student are compliant.	Student is sharing response to a question during Science, teacher prompts class to look at the speaker as a sign of respect. 100% of students would be expected to follow this direction.
Precise Praise	Academic	Teacher celebrates students’ academic effort publicly and privately by acknowledging the specific action student took to solve problem.	Teacher: You did an awesome job on your reading quiz today, I loved the way I observed you going back in your text to find evidence to support your answer.

No Opt Out	Academic	Students who answer questions incorrectly are not allowed to give up. Teacher will provide support, or call on another student to answer. Original student would at least be required to repeat the correct answer.	Teacher: Where did the story take place? Student 1: Outside Teacher: Be specific, where outside? Student 1: On a street Teacher: Can someone add more detail to this response? Student 2: The setting of the story takes place in a large city with tall buildings and skyscrapers.
------------	----------	---	--

**2. Core Curriculum Scope and Sequence.** If authorized, the Head of School will work during the planning year (Summer 2017-Fall 2018) to (1) develop, purchase, and adapt K-1 curriculum and (2) build our Course Scope and Sequence aligned to Indiana Academic Standards. In subsequent years, the Allegiant Prep Academic Leadership team will begin building the new grade-level scope and sequence the winter of the previous year (i.e. Second grade scope and sequence would start being built in the Winter of 18/19 school year in preparation for 19/20 school year). This team will include members of the academic leadership team, teachers, and external curriculum experts. Each summer the Academic Leadership team will engage in a two-day retreat to evaluate the previous year’s scope and sequence and make revisions as needed. **Attachment 4** provides course scope and sequence for subjects K-8. For curriculum not fully developed, a timeline outlining development process during the Allegiant Prep’s planning year is provided.

#### **PUPIL PERFORMANCE STANDARDS**

**1. Exit Standards.** To ensure Allegiant Prep students have a college preparatory K-8 education that will prepare them for success in a college preparatory course of study in high school, with the ultimate goal of acceptance into and success within and graduation from a four-year college, we have adopted the eighth grade Indiana Academic Standards as our exit promotion criteria.<sup>24</sup> (Please see **Attachment 5.**) These expectations will be supplemented with additional standards including the **21<sup>st</sup> Century Scholars Program**. All exiting 8<sup>th</sup> Graders will be enrolled in the 21<sup>st</sup> Century Scholar Program which affords automatic scholarships to Indiana higher education institutions when student maintains a minimum of 2.5 cumulative GPA and graduates with a Core 40 Diploma. Our Upper Dean of Students<sup>25</sup> will support all students through applying and preparing for this program. **2. Promotion Policy.** We will exhaust every option to ensure each student is supported and has the opportunity to be promoted at the end of each year. Our Grade-level Promotion Policy ensures guidelines for promoting (or retaining) a student, to include: attendance, mastery of content, as evidenced in final grades or reading level. We anticipate many entering students will be significantly below grade-level, and therefore our growth metric is included in our policy and outlined in **Figure 8**.

<b>Figure 8: Promotion Criteria</b>				
<b>Grade</b>	<b>Attendance Requirement</b>	<b>Grade Component</b>	<b>STEP level Requirement</b>	<b>Final Exam Requirement</b>

<sup>24</sup> While all our students will be taking Algebra I in Grade 8, passing the Algebra I ECA is not a prerequisite for graduation. As such, we have provided the eighth grade Academic Standards as our exit standards.

<sup>25</sup> Hired in Y5. Please see **Attachment 12** for organizational chart.



K-3	Absent < 15 days	N/A	K= Step 3 or higher; 1 = STEP 6 or higher; 2 = STEP 9 or higher; 3 = STEP 12 or higher OR 5 STEP Levels of growth	K-2: N/A 3: Pass IRead-3
4-8	Absent ≤ 15 days	Average at end of year > 70% in all core classes (ELA, Math, Science, and Social Studies)	N/A	All final exam scores average ≥ 70% (ELA, Math, Science, and Social Studies)

We provide students with multiple forms of instruction and interventions during our extended day and year, which include differentiated supports and daily tutoring to ensure we have provided a robust and tiered set of supports to work towards every student earning end-of-year promotion. If a student is failing three or more classes, that student demonstrates the need for additional instruction at the grade level and will be retained; if a student is failing one or two courses with less than a 60%, that student also demonstrates a significant skill and content gap and will be retained. **Grades 4-8 Summer School.** Students that average between 60 – 69% in one or two core subjects will have the opportunity to attend two weeks of summer school in that subject(s). At the end of summer school, students will re-take the final comprehensive assessment in the class(es) they failed, and earn a minimum of 70% on that assessment to be promoted. These students would receive the most benefit from current grade level instruction before being promoted to the next grade. **Attendance.** Students cannot learn when they are not at school. Students missing more than 15 days of school may be retained. We fully adhere to all regulations regarding student extended illness during which we provide school support and tutoring as required. Students attendance averages would not be impacted who are ill for an extended amount of time. Families receive daily and weekly communication to ensure every student is at school on time each day. Communication includes daily progress reports in K-4, weekly progress reports in grades 5-8, three formal report cards, the sharing of all staff cell phone numbers, and the expectation that all classroom teachers speak with all families a minimum of one time monthly. School leadership provides the school’s front office staff with a system to monitor attendance; daily attendance averages are included in Academic Accountability Dashboard monthly report to the Board. Families are required to meet with the Head of School once a student has accumulated over five (5) absences and will outline a plan to ensure students are at school on time each day. In compliance with IDEA, all students with IEPs or 504s will need to meet all promotion criteria for Allegiant Prep unless their IEP indicates separate goals in particular content areas. In such cases, satisfactorily meeting those goals will satisfy that component of our promotion criteria. Teachers make student promotion recommendations based on grade specific student mastery criteria. Final promotion decisions are made by the Head of School. The school reserves the right to make exceptions to this policy given special circumstances. Students’ progress toward promotion and in some cases retention would be communicated to families during the year via Parent-Teacher conferences and case by case potential retention meetings.

## SCHOOL CALENDAR AND SCHEDULE

**Calendar and Schedule.** Please see **Attachment 6.**



## SCHOOL CULTURE

**1. Promoting a Positive Academic Environment, Intellectual, Social and Moral Development.** To reach our ambitious mission, Allegiant Prep will develop the academic skills and the character habits necessary for success in high school and college, and leading a life of positive action. Allegiant Prep’s core values of Respect, Integrity, Responsibility, Perseverance, and Unity are the pillars of our school culture and will be explicitly taught and reinforced daily. **Figure 9** outlines how we define each value.

Figure 9: Allegiant Prep Core Values		
Value	Description	Examples
Respect	We demonstrate <b>Respect</b> by treating others the way we want to be treated. This includes respect for our physical space.	<ul style="list-style-type: none"> <li>• We show respect to peers and adults by making eye contact when speaking or being spoken to.</li> <li>• We show respect for ourselves by tucking in our shirts, and keeping our workspace clean</li> <li>• We show respect for materials by not spilling food or drink on Lifework (homework) or school books</li> <li>• We show respect by asking to assist others who are struggling instead of teasing</li> </ul>
Integrity	<b>Integrity</b> is doing the right thing even when no one is looking.	<ul style="list-style-type: none"> <li>• We are responsible for using our core values to guide decisions at all times.</li> <li>• We are responsible for demonstrating academic integrity at all times.</li> <li>• We are responsible for thinking about making the right decisions.</li> </ul>
Responsibility	We demonstrate <b>Responsibility</b> by taking ownership of our actions.	<ul style="list-style-type: none"> <li>• We are responsible for our learning at all times; when I have a question I ask it.</li> <li>• We are responsible for our belongings at all times; it is up to me to keep up with my personal and school belongings.</li> <li>• We are responsible for being positive, working hard, and seeking opportunities to help others.</li> </ul>
Perseverance	We work hard and show <b>Perseverance</b> from the first minute to the last minute of the day.	<ul style="list-style-type: none"> <li>• We are inspired by challenges.</li> <li>• We maintain a positive attitude during times of struggle.</li> <li>• We exude a "won't give up attitude."</li> </ul>
Unity	We have <b>Unity</b> as a team and know that " I am because we are."	<ul style="list-style-type: none"> <li>• We are responsible for not just our own learning, but for the learning of all of our community members.</li> <li>• We demonstrate enthusiasm for our peers learning and accomplishments.</li> <li>• We hold one another accountable to doing our best.</li> </ul>

**Implementing a Strong Culture from Day One.** A home cannot stand unless built upon a solid foundation. The National Association of Elementary School Principals highlights the important role a school leader has

in creating a strong school culture to ensure an ideal learning environment for students.<sup>26</sup> The culture of Allegiant Prep is the foundation on which student learning and growth will be accomplished. Our core values of Respect, Integrity, Responsibility, Perseverance, and Unity are one of the first things the Head of School, and in subsequent years to include the Dean of Students, will present, discuss, teach, and model with the students and families'/guardians in One-on-One meetings prior to the first day of school. Prior to the start of the school year, students, staff, and families all have a clear understanding of our high expectations. Families are onboarded through individualized review of the Student and Family Handbook during a **One on One Meeting**. Every new family to the school has a 45-minute individual meeting with the Head of School, engaging in a conversation around what they envision for their child in school and in life. The Head of School explains school expectations, core values, and examples of each value, and includes review of key elements of the Student and Family Handbook. After the meeting, the family, student, and Head of School are clear on what each party is accountable for to ensure the student's success (including the student). To symbolize this commitment and understanding the Head of School, student, and family sign a Community Contract which states those commitments and actions for which the family, student, and school are responsible. One commitment for the family is ensuring the student is at school on time each day. One commitment from the school is ensuring students are safe, and teachers are prepared to teach each day. Once students complete a week-long **Student Orientation**, and have been enculturated into the Allegiant Prep way, they earn the opportunity to sign the same Community Contract signed by their family and Head of School. Families and community members are invited to the ceremony and celebrate their students officially becoming Allegiant Prep students.<sup>27</sup> Allegiant Prep Staff participate in **Summer Orientation**. During July, all staff engage in a 15-day PD, during which they learn to understand what mindsets, habits, and skills Allegiant Prep members use to inspire and hold students to high expectations. The two biggest components of this practice are culture/management and instructional strategies. School Leadership will model management and instructional strategies and then staff will practice, receiving specific and concrete feedback from the Head of School, ensuring teachers and staff can effectively uphold school culture from the first day of school. **Clear and Consistent Rewards and Consequences**. At Allegiant Prep, we firmly believe that students can meet expectations when they are clear, and when rewards and consequences are delivered consistently. To that end, we have a clear system for rewards and consequences from Kindergarten through 8<sup>th</sup> grade. In grades **K-4** we use a "clip stick" as our grade wide system to monitor student behavior. The clip stick is a yard stick covered with five distinguished colors: gold, blue, green, yellow, and red. Each student has a wooden clothes pin with their name; at the beginning of the day each student's clip is on Green. When students consistently display our core values (Respect, Integrity, Responsibility, Perseverance, and Unity) they remain on green or earn their way to gold. When students choose to not follow directions their clip is moved down to yellow or red. In grades **5-8**, we use a "paycheck" system to encourage positive student behavior. Teachers track students' demonstration of our core values through Kickboard, an online data management platform that allows teachers in real-time to input student merits as 'dollars' and demerits as 'deductions'. Students can earn dollars by displaying core values and may earn a deduction for not following the rules. In grades 5-8, students will receive a weekly report that goes home and is signed by families and returned to school the next day. These reports provide an itemized list of the number of dollars a student has earned or lost along with the reason. **Small Things Make a Big Difference**. At Allegiant Prep, adults focus on all students meetings small expectations each day. We

---

<sup>26</sup> Habegger, S. (2008, Sept. & Oct.). *The Principal's Role in Successful Schools: Creating a Positive School Culture*. [https://www.naesp.org/resources/1/Principal/2008/S-O\\_p42.pdf](https://www.naesp.org/resources/1/Principal/2008/S-O_p42.pdf).

<sup>27</sup> A student would still be allowed entry at Allegiant Prep regardless of a family signing our community contract or not.



believe that attention to details discourage students from not committing larger community infractions. An expectation at Allegiant Prep is that when an adult is speaking, all students “track the speaker,” which means silently looking at the adult who is speaking. We expect students to track adults when they are speaking so they do not miss out on valuable directions or instructions. We teach students that looking at someone when they are speaking demonstrates respect for the individual, staff, and students. We expect 100% of students to meet this expectation 100% of the time because we know every student can. The reason why we focus on something as small as making eye contact is because when we do not hold students to this expectation other things begin to slip. In high school, college, and in life, students will be given multiple opportunities to make a first impression. One of the first things people notice when meeting someone is if they maintain eye contact during a conversation. Our students will be thoughtful and respectful, making eye contact is one way of reinforcing this when speaking or listening to others.

**Intelligence + Character.** The mission of Allegiant Prep concludes with a charge to our students: “live a life of positive action.” This charge is informed by our character development program. From the moment students walk in our doors, students learn our core values: Respect, Responsibility, Integrity, Perseverance, and Unity. Adults explain why these values are important and model grade-specific non-examples and exemplars. In class, teachers constantly use core values to celebrate and correct student actions. During weekly grade level Community Circles, teachers identify students, and explain how they have consistently displayed our core values.

**Joy.** Our rigorous and structured academic program is infused with joy. When students go above and beyond, teachers prompt students to celebrate their efforts through a “**J-Factor**,” or a quick celebration that boosts joy and student engagement. As students persevere through rigorous instruction, or help each other in their daily interactions (i.e. one student helping another clean up a spilled drink), these actions are positively reinforced with joyous acknowledgment. J-Factors are also used to reinforce academic fundamentals during transitions. For example, Kindergarten students count in unison from 1-20 while moving from their desk to the carpet for Read Aloud. As students are expected to work hard each day, strategic joy is a way to celebrate their efforts while reinforcing academic excellence and core values.

**Everything is Earned.** We believe that students are motivated by clear and rigorous goals. Students are motivated each day to make the right decisions and display our core values. An example of this is students earning “restaurant voice” time at lunch. Restaurant voice is the voice students use that is louder than a whisper but lower than a presentation voice. Students are expected to sit silently while their peers are receiving lunch. Once the entire community has received their food they have an opportunity to talk. Students learn during orientation that they all have to work together to earn talk time during lunch. If a student(s) begins talking before being given the direction from an adult to talk, the entire community will wait a few minutes before they can engage in conversation at lunch. Students follow this expectation because talking to friends during lunch is not something that is given - they earn this opportunity. When students earn all ‘green’, ‘blue’, and or ‘gold’ days in a week based on our clip system, the following Friday they can wear jeans and different color sneakers instead of their uniform. Students on green, blue, and gold also get to assist teachers with special tasks because they have demonstrated that they are classroom leaders. Students can also earn special classroom incentives by collectively displaying our core values and making the right decisions. Each classroom has a “Look what we are working towards” tracker. When students collectively are working hard and following directions for a sustained amount of time they earn tally marks towards their class goal. An example of this may be that a class is working toward a dance party after 25 tally marks. Earning tally marks towards their class goal is also tied to Lifework (homework) completion. Each night when 100% of students complete 100% of their Lifework they earn 3 tally marks toward the class goal. The classroom tally mark system becomes more challenging over time. After students earn an



incentive, a more rigorous goal is set for them to meet. For example, after they earn 25 tally marks the next goal may be 35 marks. Student(s) also earn the opportunity to attend field lessons outside of school. Students that choose to consistently disregard classroom expectations lose the opportunity to leave the school with their peers. Instead these students would remain at the school and work on classwork until their cohort returns to the school. Our system of “everything is earned” gives student clear goals to work toward each week. Students who may struggle with adjusting to our expectations at the beginning of the year quickly turn-around their actions so they can earn individual and community incentives. This system also cultivates a mindset of enjoying the process of working hard to earn things in life. **2. A Typical Student Day at Allegiant Prep: Kindergarten. Arrival.** At 7:30am Chris is dropped off by his family for a day of work, growth, and joy at Allegiant Prep. Chris walks to the front entrance and is greeted by the Head of School. As Chris enters, the Head of School shakes his hand and asks, “How are you doing this morning? Are you ready to have a great day of learning?” Chris makes eye contact and in a clear, college voice says, “I am doing well, and ready to work hard today.” The Head of School checks to ensure Chris is in his school uniform. As Chris enters the building he is greeted by other staff members on the way to class. Staff members are strategically placed to greet, assist, and reinforce morning expectations. Chris stops at his coat hook, takes off his book bag, takes out his Lifework folder/instructional materials, and hangs his book bag and sweater or jacket up. **Classroom Entry.** Classroom teacher, Mr. Song, greets Chris as he enters the classroom. Chris drops his Lifework folder off in the Lifework folder bin, picks up his breakfast item and milk/juice at the horseshoe table, walks silently to his desk, and begins eating breakfast. After Chris is finished, he raises his hand straight up in the air and waits for Mr. Song to give permission to throw his trash away. He pulls out his Brightwork (Reading/Math packet aligned to standards being taught in class), and works silently until 7:58am. During this time his classmates are eating or working on their Brightwork. Mr. Song raises a silent arm with two crossed fingers to let students know if they need to use the Restroom to similarly raise their hand. Students are dismissed a few at a time to go to the restroom. One male and female staff member is outside the restroom to monitor and ensure students move with purpose to get back to class. **Read Aloud and Literacy Rotations.** At 8:00am, Chris and his classmates are directed to stand up and silently transition to the color carpet for Morning Message. During **Morning Meeting**, Chris and his classmates review the core value of the week - Respect. Mr. Song names what areas of Respect they will focus on: not speaking over other students or adults, tracking (looking at) other individuals who are speaking, and treating instructional materials with care (i.e. books, pencils, folders). After reviewing the week’s core value, he leads students in reviewing words with a bossy “e.” Chris and his classmates focus because they have been working on bossy “e” words in their Reading Mastery groups. At 8:10am Read Aloud starts, and today Mr. Song is reading *Chester’s Way*. Chris and his classmates are working to identify the setting and characters in the book. Chris receives a J-Factor “GREAT” from his classmates for recalling the primary and secondary characters. At 8:40am, the first 30-minute Literacy rotation begins, so Chris joins his small group at the blended learning station to practice isolated literacy skills unique to him based on his current reading level. With one minute remaining, students are reminded of the upcoming transition. When the timer goes off, Chris and his classmates stand up silently and turn towards the direction of the next station. Chris is excited because Reading Mastery is next, he loves the engaging pace and recognizes that he is becoming a better reader. He began the school year only being able to identify letters: now he knows all his letters and sounds, and is working to start saying three-letter words. Mr. Song begins with reviewing last week’s sight words; he is confident that he knows all of the words because he reviews them every night along with his Lifework. After focusing on his sight words, he works with his group to go through the day’s lesson with Mr. Song. During Literacy rotations Ms. Rivera is also in the room to teach Guided Reading and Reading Comprehension. After his Reading Mastery lesson,



students work on an extension writing activity aligned with his lesson from the day. Mr. Song announces that each group has one minute remaining before they will break for snack and restrooms. From 9:10am to 9:25am, Chris and his classmates enjoy a quick snack, and at 9:15am the Head of School collects boys and girls that need to use the restroom. Chris goes to the restroom then returns to class in time to finish his snack. After the break Chris has his final literacy rotation for the day. **Writing and Lunch.** At 10:25am, the class comes back together for Writing. Chris and his classmates spend the first 20 minutes working on grammar skills. Today they are learning about nouns. Then, they have a 30-minute writing lesson during which Chris drafts a story about the time his dog ate some of the cake at his sister's birthday party. The lesson closes with two students standing and presenting their writing stories to the class, who all track them as they share. At 11:15am, Chris and his classmates line up silently to transition to lunch. Chris and his cohort know they must transition, enter, and sit down with their food silently to earn talk time. The Head of School celebrates how well students entered the cafeteria silently, and gives Chris and his classmates the opportunity to use "restaurant voice" during their lunch. After lunch they transition outside for 20-minutes of recess. At 12:02pm the Head of School blows a whistle, Chris and his classmates all "freeze," and the Head of School has each cohort line up silently. **Math and Science.** Chris and his classmates transition back to class for Calendar Math and CGI from 12:05pm to 12:55pm. During Calendar Math, the class goes over today's date, patterns, breaking the number of days in school down into 100s, tens, and ones. After Calendar Math, they transition to CGI (**Cognitively Guided Instruction**), during which the teacher displays an addition story problem to the classroom and reads the problem aloud three times. Students are called on to restate the problem in their own words from memory. Chris conceptually visualizes the problem in his head. After the students re-state the problem to the class, the teacher gives each student a paper to solve the problem. Each student draws a picture of how they solved the problem and explain each step they took to solve the problem, using number sentences. At the end of work time, the teacher selects three students to come to the front of the class and share the strategy they used to solve the problem. One student used a number line, another drew linking cubes, and another put the number in their head and counted. Chris loves CGI because he is always discovering new, more efficient ways to solve math problems. After CGI, a traditional Math lesson is led by Mr. Song from 12:55pm to 1:55pm; students work in groups to use number lines and linking cubes to solve addition problems. At 1:55pm, the class transitions into Science. Today students check on their growing plants. Each student observes a plant and discusses, then writes about, what has changed from the week before. Chris and his partner observe that the plant is starting to grow leaves, and students are amazed that a plant grows and gets bigger just like they do. **Physical Education and Dismissal.** At 2:35pm, students transition to Physical Education ("PE"). Today, Chris and his classmates are moving through circuit stations that include jumping jacks, sit ups, high knees, stretching and running. By the end of PE, every student is ready for a water break. Ms. Shroff, the PE teacher, ends class emphasizing the importance of working out to stay healthy. **Closing Circle** is the final whole group time with Mr. Song before dismissal. Each student sits around the perimeter of the color carpet with legs crossed and hands folded in their lap. Mr. Song leads a discussion about what things students did well, and what things students needed to work on to improve their community. Today, Mr. Song gives every student an opportunity to discuss a time they failed at something but persevered and finally succeeded. Chris shares that he has been working hard to be able to count to 100, but has not accomplished his goal yet. He says that even though he cannot count to 100 he will continue practicing at school and home until he meets his goal. His cohort is Butler University, and during Closing Circle the person who is holding the stuffed Butler Bulldog has the floor and every student tracks the speaker. At the end of the Closing Circle, the teacher says that their goal for tomorrow is to continue persevering even when they struggle or do not understand something. Chris cares about his learning and



also loves celebrating when other students share stories about how they worked hard to overcome a challenge. At 3:55pm, the teacher calls individual students to collect their Lifework (homework is called Lifework because it is preparing students to be successful in life), pack their bags, and line up for dismissal. As Chris waits for his name to be called, he takes out his Lifework packet and begins to work on his Reading and Math work. When he gets home that evening he reads his book from school for 30 minutes, and practices his sight words with his mother before he goes to bed. He goes to sleep excited to go back to school to grow his brain so he can go to college one day. **3. Teacher’s Day at Allegiant Prep: Classroom and Reading Teacher** – please see **Figure 10**.

<b>Figure10: Daily Schedule</b>			
<b>Kindergarten-Classroom Teacher</b>		<b>Kindergarten- Reading Teacher</b>	
7:10	<b>Arrival and Prep:</b> Reviews lesson plans, ensures all materials for the day are prepped, check’s school e-mail	7:10	<b>Arrival and Prep:</b> Reviews lesson plans, ensures all materials for the day are prepped, check’s school e-mail
7:15	<b>All staff Wednesday morning community circle:</b> Leadership team communicates updates, highlights staff success, practice specific focus taxonomy for the week	7:15	<b>All staff Wednesday morning community circle:</b> Leadership team communicates updates, highlights staff success, practice specific focus taxonomy for the week
7:25	<b>On post:</b> In classroom ready to greet students as they begin entering the building at 7:30	7:25	<b>On post:</b> In classroom or hallway ready to greet students as they begin entering the building at 7:30
8:00	<b>Morning Meeting:</b> Leads students in morning chants, core value focus, and academic remediation	8:00	<b>Morning Meeting:</b> Support Classroom Teacher during morning meeting
8:10	<b>Read Aloud:</b> Leads students in reading a text slightly above their reading level, engages students in story element and comprehension questions	8:10	<b>Elective:</b> Lead P.E. or Art
8:40	<b>Literacy Rotations:</b> Teaching literacy to different student groups	8:40	<b>Literacy Rotations:</b> Teaching literacy to different student groups
10:25	<b>Writing/Grammar:</b> Leads Writing and Grammar	10:25	<b>Prep:</b> Prepping student lesson materials, weekly check in with Head of School to discuss lesson plans, isolate and practice specific skills
11:15	<b>Prep:</b> Weekly check in with Head of School to discuss lesson plans, isolate and practice specific skills	11:15	<b>Lunch/Recess duty/Prep</b>
12:05	<b>Math:</b> Lead Calendar Math, CGI, and Math lesson	12:05	<b>Literacy Rotations:</b> Teaching literacy to different student groups
1:55	<b>Science/Social Studies:</b> Lead Science or Social Studies unit, alternates after each unit	1:35	<b>Prep:</b> Prepping student lesson materials, weekly check in with Head of School to discuss lesson plans, isolate and practice specific skills
2:35	<b>Prep:</b> Prepare student Lifework folders for dismissal	2:35	<b>Elective:</b> Lead P.E. or Art



3:45	<b>Closing Circle:</b> Lead end of day closing circle, discuss what community is doing well, and what students need to work on	3:45	<b>Closing Circle:</b> Support with closing circle in each classroom on alternating days.
3:55	<b>Dismissal:</b> Prepare and transition students to dismissal	3:55	<b>Dismissal:</b> Report to assigned post for student dismissal

## SUPPLEMENTAL PROGRAMMING

**1. Summer School.** Our extended school day and year and instructional program grounded in using student data to inform daily instruction will address most students’ academic needs. Due to this strategic investment in time and data driven instruction, most students will master the skills necessary to be promoted by the end of the year. As needed, we will provide additional tutoring for third graders who did not pass the IREAD-3, and fourth through eighth graders with an average of 60-69% in one or two core subjects. Third graders that attend summer school must retake the IREAD-3 assessment and pass to be considered for promotion. Fourth through eighth graders attending summer school must take and pass a content specific cumulative exam to be promoted to the next grade. Summer school dates are contingent upon Indiana testing windows for third grade. Summer school for fourth through eighth grade students will take place the two weeks immediately after the last day of school for four hours each day. We hope to align dates for all grades. We will work to identify grant opportunities to fund summer school; if grant opportunities do not arise, we will take on this cost from our annual budget. **2. Extra and Co-Curricular Activities and Programming.** Students engage in daily **Electives** and quarterly **Field Lessons** (out-of-school learning experiences related to a topic covered in core subject). In K-4, students attend a 30-minute Elective daily, with art and PE each twice per week. In grades 5-8, students attend a 50-minute Technology and PE Elective each twice per week. In K-4, the Reading teacher teaches two PE and Art classes plus Literacy rotations. In Y3, we hire one full-time Elective teacher and add another in Y5. At scale, we have two elective teachers for the Upper Academy (5-8). See **Figure 11** for our enrichment sequence.

Figure 11: Elective Sequence				
	Grade 5	Grade 6	Grade 7	Grade 8
<b>Physical Education (PE)</b>	Motor skills/movement patterns	Understand connection between active lifestyle and physical fitness	Students incorporate concepts from other disciplines into movement and fitness	Self-identify what physical fitness activity will help maintain healthy lifestyle
<b>Technology</b>	Word Processing, Multimedia and Presentation Tools, Research Tools	Basic Operations, Spreadsheet, Website Design	Advanced Coding, App Creation, Digital Citizenship	Robotics

**Field Lessons.** During Summer PD, teachers will identify a list of off-campus Field Lesson opportunities for students aligned to content and specific State Standards, to be provided to students three times per year, and which includes a university tour to which we invite our families. As outlined in our budget, we have allocated \$5 per student in Y1-Y5 to Field Lessons, and will work to identify grants and seek donations to supplement the remaining cost. See **Figure 12** for Example of Standards Aligned Field Lessons.



Figure 12: Standards Aligned Field Lessons		
Subject	Lower Academy	Upper Academy
Science Aligned	Farmers Market; WTHR Weather Station; Children’s Museum; Indianapolis Zoo; Fowler Ridge Wind Farm	Eli Lilly Lab; Eagle Creek Overnight observation at Gnaw Bone; Local Small Business; IND Airport Air Traffic Control
Social Studies Aligned	Indianapolis Repertory Theatre; Central Library; Fire Station; Connor Prairie Eiteljorg Museum; Indiana State Museum	Civil Rights Museum-Memphis; Cincinnati Underground Railroad Museum
College Tour	University of Indianapolis IUPUI	Tennessee State University Indiana University

**3. Student Mental, Emotional, and Social Development and Health.** Students’ social, emotional, and character growth are essential to being well-rounded productive students, and ultimately adults. All staff are trained on how to support students in developing their thoughts and feelings, displaying compassion for others, building self-confidence, problem-solving, self-regulating, and using their moral compass to make sound choices. Our core values are used to teach, model, and help students internalize what Respect, Responsibility, Integrity, Perseverance, and Unity look like. These core values are not relics on the wall, but instead made tangible by teachers who are constantly looking for opportunities to celebrate students using them and create learning moments when they need to be reinforced. When student emotions run high they are given the space to decompress, share their feelings (through writing or speaking with teacher or leadership), reflect, and think about how they can avoid the same mistake or conflict moving forward. Through our core value of Unity - I am Because We Are - students learn during Student Orientations, Morning Messages, Closing Circles, and weekly Community Circles that healthy relationships with their community members ensure students are safe and able to learn. During lunch, students do not start eating their food until every student has been served. This is a daily reminder that “We” is greater than “I.” During academic discourse and while socializing, students are encouraged to share their interpretations, opinions, and thoughts. Teachers explicitly teach students that disagreements happen, but to always stay in character and show respect. Starting in Kindergarten, students learn sentence starters (i.e. “I respectfully disagree,” “I would like to add on”) to use when they do not agree or what to add on to a comment that was made by another student. For students that need more support in their social development, the Head of School in Y1-Y2 will support these students through targeted interventions which may include strategic check-ins, behavior reflections, and personalized behavior plans. In Y3, a part-time Social Worker will work with individual and small groups of students as needed in these areas. The Dean of Students in Y5 will work in partnership with the Social Worker to provide targeted interventions for students as well. We will seek out mission-aligned individuals and organizations in the community to support students when appropriate, and the Dean of Students will develop and manage community members to serve as mentors, beginning in our 5<sup>th</sup> year of operation.

**4. Student Focused Activities.** For students to go to, persist, and graduate from the college of their choice, and thrive as people, they need to be responsible for their actions and make sound independent decisions. Regardless of career choice, students need to know how to manage conflict, regulate emotions, and work with other people in their personal and professional lives. Our core values of Respect, Integrity, Responsibility, Perseverance, and Unity inform our students’ moral compass and ability to manage the social and emotional demands in their personal and professional lives. Each week a specific core value is focused on during Morning Message, Closing Circle, and during the weekly grade wide Community Circle. **Figure 13** provides examples of student actions aligned to school core values.

**Figure 13: Allegiant Prep Core Values in Action - Examples**

Action	Value
When an adult or peer is speaking all students “track” (look at) the speaker.	Respect
In Reading, a student disagrees with another student’s explanation of a character’s motivation. The listening student lets the student finish, raises their hand, and respectfully disagrees and provides evidence to support the motivation of the main character.	Respect
A student finds a dollar in the hallway; s/he takes the dollar to the teacher and tells them where they found it.	Integrity
Students work independently on a task on the opposite side of the classroom. Even though the teacher is not in front of them they are working hard to follow the directions and complete their work.	Integrity
A student is finished reading their take-home book early, they ask the Teacher if they can get a new book so they can continue to read 30-minutes each evening.	Responsibility
The Indiana University cohort earns a point for Responsibility because 100% of students completed last night’s Lifework	Responsibility
A student did not get the correct answer to their mixed fraction addition problem. Instead of giving up they refer to their notes, re-do the problem, and get the correct answer.	Perseverance
A student entered First Grade Reading on a beginning of the year Kindergarten level. Through hard-work, focus in class, practicing 30-minutes of reading, and sight word practice each evening, s/he is reading on a mid-second grade level by the end of the year.	Perseverance
I recognize my classmate is struggling to answer a Math problem, I raise my hand to ask Teacher if I can provide them with a strategy.	Unity
During Guided Reading a student struggles to pronounce a word in front of their peers, each student pumps their arm in a circle to show the student support to keep working hard.	Unity

## SPECIAL POPULATIONS AND AT-RISK STUDENTS

**1. Plan to Serve Students with Special Needs.** We support all learners through rigorous instruction, high expectations, and necessary and appropriate interventions and instruction for every student. Students with unique needs receive robust supports within our extended school day. We provide research-based, proven curriculum and differentiated instruction to support all students, including Special Education students, English Language Learners, gifted learners, and students with Section 504 plans. Frequent small group instruction (10:1 student to teacher ratio), daily individualized Blended Learning opportunities, and built in re-teach and remediation blocks provide us with the structure to address the academic and social needs of our students with special needs. **2. Students with Mild, Moderate, and Severe Disabilities.** Serving students identified as having disabilities under the law or whom we suspect may have such disabilities, we provide a Free and Appropriate Public Education (FAPE) and comply with all applicable state and federal statues, including Title II of the American with Disabilities Act of 1990 (ADA), the individuals with Disabilities Education Act (IDEA), and Section 504 of the Rehabilitation Act of 1974. We educate students with disabilities in the least restrictive environment (LRE) and with their non-disabled peers to the extent appropriate and allowed by each student’s Individualized Education Plan (IEP). We do not discriminate in our admission and enrollment practices against students having or suspected to have

disabilities. **(a) Identification and Protecting Against Misidentification.** Upon enrollment, we conduct individual One-on-One meetings with students and families. In addition to going over our mission and vision, we ask each family to identify if their student has an existing IEP or has ever received special education services. If so, we provide appropriate documentation to ensure students receive required accommodations and modifications aligned with the IEP or 504 Plan requirements. We reach out to preschools and school districts to determine if students have ever been identified in accordance with IDEA. Our Head of School, Operations Manager, and Special Education Teacher(s) (in Y4 led by the Student Supports Coordinator) oversee this process. During staff summer PD, during our first and second years of operation, our Special Education Teacher works with general education teachers to ensure all students' needs are being met and all services are provided (in Y2 two full time Special Education Teachers, Y4 a Student Supports Coordinator (SSC) will manage Special Education Teachers and oversee Special Education program). During the school year, Special Education Teachers work with classroom teachers to ensure Special Education students' modifications and accommodations are being implemented during instruction and that all services are being provided. Our Special Education teachers and SSC will be licensed within the State of Indiana as special educators. Our academic program integrates frequent, strategic academic monitoring and push-in supports to ensure students with IEPs are receiving all modifications and accommodations outlined in their plan. During summer PD, the SSC leads staff in scientifically-based academic and behavioral intervention support training. In years 1-3, the Special Education training is facilitated by certified Special Education staff; in year 4, the SSC is responsible for preparing and leading staff trainings. In compliance with the Indiana's Commission of Seclusion and Restraint (Indiana Code 20-20-40), we will secure CPI training for all staff. Our Operations Manager will oversee the recertification process for staff to ensure every staff member has a valid and up-to-date CPI certification. Frequent internal assessments provide in-the-moment snapshots of where students are and what specific academic or behavioral skills they are struggling with the most. During the week, each teacher reviews students' progress based on Lifework (Homework), classwork, quizzes, projects, observations, and anecdotal notes. Teachers are equipped with formal and informal data to quickly respond to the needs of every student. School leadership and staff work together to monitor assessment data on a regular basis. For students identified as not progressing at a pace to meet end-of-year academic goals, we use a pre-referral, Response to Intervention process or RtI.<sup>28</sup> Teachers, leadership, and the Coordinator of Student Supports work in partnership to design a proactive intervention plan to address deficits and monitor progress towards plan goals for six weeks. Our responsibility, specifically with students in the earlier part of their education, is to provide additional academic and behavioral support assist in development and meeting end of year academic and behavior goals within the general education environment. If the intervention planned is deemed unsuccessful, not resulting in student academic or behavioral improvement, we schedule a meeting at a convenient time for the students' parent/guardian to discuss our next plan of action. This conversation with the student's parent/guardian would include considering if the student needs to be considered for evaluation for special education eligibility and related services. If the family agrees to conduct an evaluation for their student the school will secure a written parental consent form before administering testing. The school will conduct testing, through an appropriately licensed educational psychologist. Post testing, we will hold a conference with the parents, the CSS, student's teacher, and member of the school leadership team to make a decision on the student's eligibility for special education services. If the student is eligible and the family agrees in writing, an Individual Education Plan (IEP) is developed. Each student's IEP will be reviewed at least one time each

---

<sup>28</sup> Response to Intervention Strategies- A Guide for Teachers. (n.d.). <http://www.specialeducationguide.com/pre-k-12/response-to-intervention/effective-rti-strategies-for-teachers/>.



school year, and each student will be re-evaluated at least once every three years. Students' families can request to meet with the school at any time to discuss the details and goals of their student's IEP plan. At the request of a legal guardian, we will evaluate any student for a disability. Section 504 requires schools to provide students with disabilities appropriate educational services designed to meet the individual needs of such students to the same extent as the needs of students without disabilities. Section 504 prohibits discrimination on the basis of disability. We adhere to all obligations under Individuals with Disabilities Education Act (IDEA) and Section 504. We immediately evaluate and identify any students protected under Section 504. This includes any student determined to: (1) have a physical or mental impairment that substantially limits one or more major life activities, (2) have a record of such impairment, or (3) be regarded as having such impairment. The CSS serves as the Section 504 coordinator to ensure students' legal rights are met and their special needs are effectively served. In Y1-Y3, Special Education Teacher(s) works with school leadership and teachers to support and ensure compliance with Special Education students. In Y4, a Coordinator of Student Supports will be hired to manage the Special Education program. We will work with INISchools to secure related services (Speech/Language, OT, PT) in accordance with IEPs and provide time and space for these services to be administered onsite. We have budgeted conservatively and based on special education enrollment at schools on the Westside are projecting an 18% Special education population in Y1. **(b) Evidence-based Instructional Programs.** Our educational model is an inclusive and heterogeneous and serves all students. Our program design is informed by high-performing urban schools serving similar student populations including disabilities language proficiency barriers, and/or special circumstance that put them at risk for academic failure. To the fullest extent possible, we will provide a full inclusion model, maximizing accommodations and minimizing modifications. **(c) Evaluation and Progress Monitoring.** Progress monitoring occurs in alignment with IEP goals and is reported out accordingly. We look to the assessments of students with disabilities receiving special education services, including improvements in performance on the NWEA MAP, STEP, Fountas and Pinnell grade level equivalencies, ISTEP+, IRead and teacher-created assessments to determine our program's effectiveness. We disaggregate assessment results between students with disabilities and students without disabilities to continuously monitor and improve the efficacy of our special education program. In Y1-Y3, the Head of School and Special Education Teachers lead teacher development through our summer PD and weekly PD meetings as grade-level teams and whole staff to monitor student performance and adjust where needed to support all students on their journey to college. In Y4, the SSC will be hired to manage and oversee the Special Education department. **(d) Please see Promotion Policy. (e) Qualified Staff.** In our first year of operation, we will employ a full-time, licensed special education teacher. In Y2 we will hire an additional special education teacher to support our increased special education population. Our SSC will be hired in Y4 to directly manage our special education teachers and provide oversight for the special education program. The Head of School will work closely with the special education teachers and SSC to ensure special education students' plans are being followed and the school is within compliance. We will reassess our special education student population needs overtime and make staffing additions as needed to support all students. All staff hired to teach or supervise Special Education programming will be Highly Qualified and hold license (or emergency certification) to teach Special Education in Indiana, and additional certifications or requirements per the state Authorizer. **3. English Language Learners.** We will serve English Language Learners (ELLs) in accordance with all applicable Federal Laws and regulations related to the education of language minority students as stated under Title IV of the Civil Rights Act of 1964 and the Equal Education Opportunities Act of 1974. We will proactively identify and support ELLs and provide targeted, individualized plans to ensure proficiency at the same high level as their peers and based on the same academic programs and

opportunities provided to all students. **Identifying ELL students.** We follow these steps to identify ELLs that should receive English language instruction and support. **Step 1 - Identification of Potential ELL Student.** We will use the STN site to see if enrolled student has pre-existing ACCESS score from a previous school in Indiana or another WIDA state. If no previous record of Home Language Survey exists, we will administer to identify that there is a language other than English spoken by the student or at home. **Step 2 - Evaluating Potential ELL students.** The ELL certified staff member will administer the WIDA-ACCESS Placement Test (WAPT) to assess the four language domains of Listening, Speaking, Reading, and Writing. Based on the results and observation using the WIDA Can Do Descriptors, the ELL teacher will determine the ELL status. **Step 3 - Student is identified as ELL.** ELLs will be provided Sheltered English Immersion (SEI)<sup>29</sup> instruction and developmentally appropriate instruction aligned to the WIDA English language development Standards Framework. **Step 4 - Communicating with Parents.** The Head of School will notify parents in writing in parents' preferred language of the reason the child was identified as ELL, a description of the child's current level of English proficiency, and description of the program placement and method of instruction, the manner in which the program will meet the child's educational needs, a description of how the program will help the child to learn English, the requirements for exiting the program, and the parent's right to waive ELL services. If requested, a follow-up meeting will be set up between parents and the Head of School and ELL certified staff member. **(b) Evidence-Based Instructional Programs.** Our instructional practices for ELLs will incorporate the five strategies outlined on the federal Department of Education Doing What Works webpage: screen and monitor progress, provide reading intervention if needed, teach vocabulary, develop academic English, and schedule peer learning. These will be integrated into daily instructional practices through discourse, pushing-in vocabulary, small group literacy instruction, and cooperative learning. **(c) Evaluation and Progress Monitoring.** Students identified as English Language Learners (ELL) will be assessed annually to determine improvement in English language proficiency (ELP). We will use the World Class Instruction Design and Assessment (WIDA) and ACCESS Placement Tests to screen the English language proficiency of enrolling students identified as potential ELLs. We will work to identify ELLs as quickly as possible and will make this determination using ACCESS exam scores, input from general education teacher, and data from general education progress. **(d) Qualified Staff.** Based on ELL percentages of other school on the Westside, we anticipate a 15 % ELL population, and have staffed accordingly. We are committed to adjusting our hiring structure as needed based on actual enrollment and students' needs. In Y1, we will hire at least one ELL certified teacher. Teachers will receive training from Special Education Teacher and ELL certified teacher during Summer Orientation and during PD throughout the school year to ensure best practices for meeting the needs of all students are implemented by our staff. We will leverage partnership with external organizations where needed to support our ELL students and families. **4. Students Performing Below Grade Level.** Based on Westside school performance data, we anticipate a significant portion of our students will be performing below grade-level when arriving at Allegiant Prep. Our school model includes additional supports and structures, and additional learning time to ensure 100% of students are reading at grade level by the end of third grade. We will accomplish this goal with an extended school day and year, two-teacher literacy model, blended learning, extended literacy and math instruction each day, small group differentiated instruction, daily reserved tutoring time, and language acquisition and vocabulary development support. During enrollment, each student will complete the STEP reading assessment to gather baseline data. We will administer STEP testing again three times during the year, to ensure adequate student growth. The data we receive from the STEP assessments, our interim assessments, and NWEA MAP assessments will

---

<sup>29</sup> <http://www.brown.edu/academics/education-alliance/teaching-diverse-learners/strategies-0/sheltered-english-instruction-0>.

inform tutoring groups and remediation necessary for students who have skill and content gaps. If a student is not making adequate progress overtime as determined by the student’s teacher, in conjunction with school leadership, we will use the Rti process outlined above. **5. Intellectually Gifted Students.** We will serve all students, including the intellectually gifted. **(a) Evidence-based Instructional Programs, Practices, Strategies, and Opportunities.** During Student Enrollment students who score in the upper quadrants of the NWEA MAP are placed on a list of students considered for Gifted and Talented Services. During the year students are identified by scoring Pass Plus on state assessments, above-grade level proficiencies on STEP assessment, and/or in scoring both high growth and high achievement consistently on the NWEA MAP. Once identified, we will administer the Cognitive Ability Test (CAT) to identify High Ability Students. If identified via CAT, the classroom teachers, and Head of School (starting in Y2 the Director of Curriculum and Instruction) will create an Advanced Learning Plan for the student. This plan would be communicated in writing to the student’s family, and a meeting would be held if the family wanted to discuss in more detail. **(b) Qualified Staff.** Classroom teachers will be responsible for monitoring Gifted and Talented students progress towards SMART goals and recommend adaptations to adjust Advanced Learning Plan where needed. Modifications for Gifted and Talented students include: differentiated Lifework (HW), classwork extension materials, provided additional enrichment during small group time, completing projects with additional access to technology and computer-based programs. Our small group literacy groups allow teachers to differentiate the pace and instructional needs, and incorporate more advanced text to meet these student’s needs. **(c) Evaluation and Progress Monitoring.** We will disaggregate school-wide data (NWEA, MAP, STEP, Fountas and Pinnell grade level equivalencies, ISTEP+, IRead and teacher created assessments) to evaluate our program’s effectiveness in advancing and improving our Gifted and Talented students’ academic and social growth and success.

## STUDENT RECRUITMENT AND ENROLLMENT

**1. Recruitment and Marketing Plan.** Immediately following authorization, we will recruit an inaugural cohort of 120 students (60 Kindergarten and 60 First Grade) who currently do not have access to a quality school. We will partner with organizations on the Westside including Headstart programs, daycares, apartment complex managers, churches, business owners, healthcare providers, and nonprofits. **Figure 14** provides a list of these Westside organizations. During our first operating year (2018) and in subsequent years, our formal student recruitment will begin in January each year.

**Figure 14: Current and Potential Westside Community Partners**

Community Alliances on the Westside, Westside Community Development Corporation, Near West Great Places 2020, Christamore House, Indiana University School of Dentistry First Samuel Baptist Church, Haughville Library, Marry Rigg Center, Friendship Baptist Academy, and New Beginnings Childcare
--

We have hosted one formal **Community Discussion** to introduce the Head of School and to understand what potential families want for their children’s educational experience and future and two formal neighborhood canvassing events on the Westside, speaking with families about the mission and vision of the school, and providing Allegiant Prep brochures with information about our mission and elements of our school design. During these events, the Founding Team and volunteers came together to provide manpower to reach as many families as possible. The proposed Head of School has spent countless hours stopping by Westside businesses such as beauty salons, barber shops, restaurants, dollar stores, and churches in the 46222-zip code to speak with potential supporters and families. During and after authorization, and into our planning year we will continue to host at least two **Community Discussions**

and two **Canvassing Events** each month. We will use digital media to supplement Westside recruitment efforts. Our website will be our online “home base” for relevant information about school priorities and updates. We will also leverage Facebook, Twitter, and LinkedIn to reach potential families, and community members. Our online presence will provide updates on exciting school news and information about the school and a place to access Intent to Enroll forms (available immediately upon authorization), and enrollment forms (available the first business day in October post-authorization). Our monthly e-newsletter is sent out at the beginning of every month to over 200+ supporters to keep the community informed and engaged of our plans prior to authorization, and will continue to be sent out during our planning year and when the school opens. We will send a monthly paper newsletter out to students’ families starting in the Fall of 2018. The Head of School, with support from the Board, will work in his planning year to amass a list-serve of 500 participants by the Fall of 2018. We will use Census tract data and targeted mailers to market to families we are not able to engage through other recruitment events. We have allocated \$8,000 to student recruitment and marketing during the planning year. **2. Enrollment Policy.** In full compliance with all state and federal laws, Allegiant Prep will not discriminate on the basis of race, color, national origin, creed, gender, ethnicity, sexual orientation, mental or physical disability, age, ancestry, special need, proficiency in the English language, or academic achievement in admitting students. We will not discriminate in recruitment or enrollment practices against students who have or may appear to have disabilities. We will not set admissions criteria intended to discriminate or have the effect of discriminating on any of these bases. Our enrollment policy, including admissions requirement, tentative dates for the application period, tentative lottery dates and procedures, and policies for students on waiting lists, withdrawals, re-enrollment, and transfers is in **Attachment 7**.

## **STUDENT DISCIPLINE**

---

**1. Discipline Philosophy.** Our discipline philosophy is grounded in three core beliefs. **Purpose over Power - Students follow directions when they are respected and understand the why behind behavior expectations.** Behavior expectations are modeled, explained, and discussed with all students during a week-long orientation. Proving a clear model and including the rationale for why the expectation is important sets students on a path to success. Staff understands that students are children, but they are also human beings. Teachers work hard to build genuine relationships with students to understand each individual student. Teachers are encouraged to develop these relationships through eating lunch with students, playing with students at recess, building community during Morning Message, and Closing Circle. **Opportunities to learn from mistakes are important for growth and learning.** No student or adult is perfect; we all make mistakes. When students make mistakes, we support them in learning from those mistakes in a calm, respectful manner: our school discipline system is rooted in restorative practices. When a student makes a poor choice, teachers support them (assuming the best, positive narration, and strategic observation) immediately to encourage and guide them to make better decisions. You will often hear teachers directing students to “earn it back”; this refers to when a student has received a demerit the teacher is prompting them to work hard to earn a merit back by working hard to make a better decision. **Through explicit and intentional character development and discipline, students develop a moral compass that will guide their decisions at Allegiant Prep, in high school, college, and life.** For students to ultimately excel in college and gain upward mobility in career and life they have to be internally motivated by doing the right thing because it is right. Each week teachers focus on a specific core value and what student actions are aligned to this value. For example, if the week’s focus is Respect, the teacher would identify using please and thank you when appropriate or not talking over another student who is answering a question. During the day, teachers acknowledge and celebrate students who



are demonstrating actions aligned to our core values. Students will develop a strong sense of right and wrong at Allegiant Prep. Our character development program will ensure students have a solid understanding and desire to treat others the way they would want to be treated. As college students and adults, they will constantly tap back into their values when making personal and professional decisions.

**2. Discipline Policy.** Our discipline policy includes how the school will promote a positive, safe, structured environment, list of suspension/expulsion worthy offenses, the rights of students with disabilities in disciplinary actions, description of appeal process, and the means by which parents will be informed of the school's discipline policy can be found in **Attachment 8**.

## PARENTS AND COMMUNITY

**1. Local School Options.** Allegiant Prep is committed to founding and sustaining a high-performing, college preparatory public K-8 school on the Westside of Indianapolis, within 46222 and surrounding neighborhoods. In 46222, there are 8 elementary options available to families: 3 schools received an F grade, 3 a D, and 2 a C on the 2015-2016 letter grade assigned by the Indiana Department of Education. **Figure 15** outlines local school options and includes demographic and academic data.

Figure 15: Local School Options								
School Name	School Type	Enrollment	Grade Span	15/16 Grade	IREAD 3 Pass % (14/15)	Both ISTEP+ Pass % 3/4/5 (15/16)	Racial Demographics	%FRL
<b>Stephen Foster School 67</b>	District (IPS)	573	PK-6	D	87.2	24/17/28	25% Black 54% Hispanic	77%
<b>Ernie Pyle School 90</b>	District (IPS)	376	PK-6	C	76	19/50/55	41% Black 46% Hispanic	76%
<b>Daniel Webster School 46</b>	District (IPS)	487	K-8	D	71	N/A/27/29	85% Black 7% Hispanic	78%
<b>William Penn School 49</b>	District (IPS)	597	PK-6	B	79	31/40/33	13% Black 51% Hispanic	78%
<b>Wendell Phillips School 63</b>	District (IPS)	450	PK-6	F	54.7	24/14/21	57% Black 33% Hispanic	71%
<b>Clarence Farrington School 61</b>	District (IPS)	694	PK-6	D	72.2	18/12/19	49% Black 44% Hispanic	72%
<b>Edison School of Arts 47</b>	District (IPS)	523	K-8	C	86	33/20/32	65% Black 17% Hispanic	70%
<b>Louis B. Russell Jr. School 48</b>	District (IPS)	383	PK-6	F	N/A	14/6/3	93% Black 2% Hispanic	74%
<b>Vision Academy</b>	Charter	439	K-8	C	N/A	10/3/14	85% Black 7% Hispanic	78%

These schools are directly in or around the 46222-zip code (target area). Out of the 9 schools listed, only one received a letter grade from the state higher than a C. The highest passing rate for the 3<sup>rd</sup> Grade ISTEP+ ELA assessment is 33%, an indicator for future academic success. The student achievement data is clear: these schools are not equipping these students with the academic skills necessary to be successful in high school, college, and life. Families and students on the Westside want access to a college preparatory school that values instructional time and prioritizes student learning and outcomes. Based on





this data it is apparent that Allegiant Prep’s academic program is absolutely needed. **2. Uniqueness to Meet Demand.** Currently on the Westside many families do not have the option to send their child to a high-quality, college preparatory K-8 school. Through rigorous instruction, character development, and community, Allegiant Prep ensures that all graduates are on path to taking at least one AP exam in high school. Statistics show that students that take at least one AP course in high school puts them on track to attend and to perform well in college.<sup>30</sup> Allegiant Prep students will have evidence that supports student growth and mastery toward end-of-year learning goals and a seamless K-8 college preparatory experience. Our school is broken into two academies, Lower Academy (K-4) and Upper Academy (5-8), students receive a culturally and academically vertically aligned education that will prepare them to take AP courses in high school, earn competitive SAT scores, and ultimately earn their way into the college of their choice. Our Upper Dean of Students will work with high performing high schools such as Cathedral, Brebeuf Jesuit, and Scecina to ensure opportunities for Allegiant Prep 8<sup>th</sup> Graders to attend. Some students will attend high school on the Westside, and we will work to ensure they are equipped to enroll in courses that will position them to earn credits toward attending a 4-year college. Allegiant Prep’s culture of high academic and behavior expectations brings a much-needed educational option to the Westside. We will uniquely provide an extended school day and school year, double doses of daily literacy and math instruction, two-teacher literacy model, small group reading groups, explicit character development, empowering families to support student growth, community building, Field Lessons, Nightly Lifework (HW), and Cognitively-guided math instruction. Families will have confidence that their children are attending a school that prepares students for college and life success. Mr. Anderson has embedded himself on the Westside, volunteering at early childcare programs, attending Neighborhood Association meetings, and speaking with directors of Westside Neighborhood Community Centers like Christamore House about our mission. As Mr. Anderson has spoken with potential families in the target area of the school they have expressed that they want a school where their child will be (1) safe, (2) challenged and grow, and (3) equipped to ensure they are supporting their child’s growth and academic success. These family requests are incorporated into the culture, academic design, and family support structures at Allegiant Prep. If authorized, Mr. Anderson as Head of School with the support of the Board will implement a 14-month (June 2017-July 2018) formal community engagement plan to (1) generate interest, (2) identify opportunities to enroll students, (3) maintain monthly communication, (4) enroll students, and (5) retain students that enroll. We are confident that the work Mr. Anderson has done volunteering in early childcare programs and earning the respect of community members and leaders will allow us to implement a community engagement and enrollment plan that will allow us to meet our goal of opening our doors to 120 students (60-K and 60-1) in the Fall of 2018. Outline of Enrollment plan provided in **Attachment 7. 3. Parent Engagement.** Each individual that touches the life of a student has an important role at molding them. No individual has a greater responsibility or influence to have this impact on our students than their families. “The school’s best ally in the task of nurturing a student’s innate ‘urge to learn is, first and foremost, the parents,” says Bernie Poole author of Education for an Information Age.<sup>31</sup> Allegiant Prep recognizes that for students to be successful, their families have to be invested and willing to reinforce school expectations at home. To understand the needs of our individual families and communicate our expectations, we have **One-on One** meetings with each new student’s family over the summer; the Head of School will outline what expectations the family can expect from the school and what the family must do to ensure their student’s success. We will have parents fill out a list

---

<sup>30</sup> <https://research.collegeboard.org/sites/default/files/publications/2014/1/research-report-2013-5-are-ap-students-more-likely-graduatecollege>.

<sup>31</sup> Education World: Parents and Teachers Working Together. (n.d.). [http://www.educationworld.com/a\\_curr/profdev/profdev124.shtml](http://www.educationworld.com/a_curr/profdev/profdev124.shtml).



of volunteer opportunities they may prefer. This list is compiled and when specific volunteer opportunities arise school leadership will call families based on the volunteer work they checked on their survey. We continue to empower and equip our parents during the school year through **University Nights** (monthly), **Coffee & Donuts** (monthly) with the school leader, **Volunteer Opportunities** (monthly), teacher communication (monthly), **Lifework** (K-8) (weekly), **“Paycheck” Reports** (5-8) (weekly), **Family Surveys** (annually), and access to monthly Board meetings with opportunities for input. All families are encouraged to join our **Parent Advisory Council** and attend off-campus **Field Lessons** when volunteers are needed. Students families have 3 formal Parent Teacher Conferences scheduled during the year. See **Attachment 6** for our school calendar. **4. Community Resources.** Lead Founder and proposed Head of School Rick Anderson has immersed himself on the Westside through volunteerism and attendance at monthly neighborhood association meetings. He has volunteered at the First Samuel Baptist Church and the Mary Rigg Center. He has attended monthly Haughville Neighborhood Association meetings to understand the wants and needs of local community members. Organizations that Allegiant Prep is looking forward to building formal relationships with include: Center for Leadership Development, EdTeach, Goodwill Education Initiatives, Head Start, Indianapolis Symphony, Kids Dance Outreach, La Plaza, IMPD, IFD, and IUPUI. These partnerships have the potential of yielding opportunities for student recruitment, fund development, field lessons, and supports for our families. **5. Evidence of Support.** Please see **Attachment 9** for evidence of support.

## PERFORMANCE MANAGEMENT

**1. Additional Academic Goals.** In addition to the student academic goals defined by the ICSB, Allegiant Prep will internally monitor progress towards the following goals. **GOAL 1. Student achieve mastery in English Language Arts. Measure 1a.** In cohort analysis of longitudinal growth, students, on average, will have a minimum of five (5) percentiles of growth per year in ELA as measured by the NWEA MAP until the average percentile score reaches 75. **Measure 1b.** As determined by the STEP assessment: 80% of students are reading on grade-level; 90% of students attending Allegiant Prep 2 more years are reading on grade-level (Y2); 90% of student attending Allegiant Prep for 2 or more years pass the IRead-3 (Y3). **Goal 2: Students achieve mastery in Mathematics. Measure 2a.** In cohort analysis of longitudinal growth, students, on average, will have a minimum of five (5) percentiles of growth per year in mathematics as measured by the NWEA MAP until the average percentile score reaches 75. **2. Interim Assessments.** In addition to administering state assessments in all required grades and subjects, we will administer the nationally norm-referenced assessment NWEA Measures of Academic Progress (MAP) three times per year, allowing us to calibrate our students’ academic performance to other students across the country, align students’ needs with instructional objectives, and provide evidence of exceptional student achievement with external stakeholders. We administer internally created interim assessments, the Strategic Testing of Educational Progress (STEP) assessment four times per year, weekly “Show What You Know” quizzes, and daily exit tickets. Following STEP and NWEA MAP assessments, teachers and school leadership have a full **Data Day** to analyze results and make academic action plans to address skills that students have not yet mastered. When appropriate we may use another assessment tool to ensure the most proven, reliable, and effective tool is being utilized. Below is an overview of our assessment system.

Assessment	Frequency	Subject	Description
NWEA MAP (all grades)	3 times annually	English Language	Computer adaptive achievement tests in Mathematics and Reading. Compares individual student’s performance against performance of same-grade peers nationally.

		Arts, Mathematics	
STEP (K-3)	4 times annually	Reading	Reading assessment measuring reading level, and progress on mastery of specific skills (letter sounds, fluency, and comprehension). Data provided appropriate level of text for students, informs progress towards literacy annual goals, and informs reading instruction.
Interim Assessments (all grades)	End of unit	English Language Arts, Mathematics	Frequent assessments given after each unit, measures student progress towards mastering standards. Question rigor and format reflect standardized assessment
Exit Tickets	Daily	English Language Arts, Mathematics	3-5 Teacher created questions aligned to objective of lesson. Teacher collects and analyzes data to identify if students mastered lesson objective.

**3.Data Analysis Process.** Our assessments allow us to identify skills and objectives that students have and have not yet mastered, but to best plan for supporting students in their progress towards goals, we must deeply analyze student data. Our structure for student data analysis is built from *Driven by Data: A Practical Guide to Improve Instruction*<sup>32</sup>, allowing us to create interventions, re-teach lessons, and create small group remediation plans to address specific skills that students need to master to meet end-of-year mastery and growth targets. We will analyze data from a variety of assessments, including NWEA MAP, STEP, Interim Assessments, and Daily Exit Tickets. We have 4 Data Days during the year without students following MAP and STEP rounds. during this time teachers and leadership work together to isolate skills students did not master and create academic action plans to address in class during whole and small group instruction. **Unit Exams.** Teachers analyze student Unit Exams every 4-6 weeks. Teachers discuss student misconceptions and skills that have not been developed to create and submit (Y1 to Head of School, Y2-Dean of Curriculum and Instruction) an action plan that outlines what specific skills students did not master and plan to address during in class instruction and tutoring. The Head of School and Dean of Curriculum and Instruction will review and provide feedback on this action plan. During the subsequent weeks and months, the leadership team will work with teachers via lesson plan feedback, check-ins, and in-class observations to ensure the action plan is being executed with fidelity.

Figure 17: Unit Exams			
Assessment	Frequency	Owner	Examples of Outcomes
Unit Exam	End of each unit	Teachers (with support from leadership team)	<ul style="list-style-type: none"> <li>• Reteach</li> <li>• Spiral review</li> <li>• Remediation lesson</li> <li>• Adjust order of scope and sequence</li> </ul>

**STEP Assessment (K-3).** The Head of School, and beginning in Y2 the Dean of Curriculum and Instruction, oversees the administration of the STEP assessment, including ensuring that all STEP assessment data is input in the STEP tool after the most recent STEP round. Both teachers and the leadership team (as hired) analyze results to identify areas of growth and isolate specific subgroups based on reading skills still not mastered, including SPED and ELL students. After each STEP window teachers attend a day long Data Day without students to work in grade level teams to make necessary shifts to individual literacy groups.

<sup>32</sup> Bambrick-Santoyo, Paul. *Driven by Data: A Practical Guide to Improve Instruction*. San Francisco, CA: Jossey-Bass, 2010.



Teachers will arrange student groupings based on skills still needed to be mastered to advance to the next STEP level. After new student groups are created teachers work to create 6-week literacy objectives to drive instruction and develop student skills necessary to achieve next STEP.

Figure 18: STEP Assessment			
Assessment	Frequency	Owner	Examples of Outcomes
STEP Assessment	6-8 weeks	Grade-level teams (with support from leadership team)	<ul style="list-style-type: none"> <li>Adjust literacy groupings</li> <li>Isolate specific literacy skills unique to each group</li> <li>Practice silent reading and answering inferential questions</li> </ul>

**End-of-Course Exam (4-8).** Teachers complete assessment analysis to provide rationale for skills students did not master during that academic year. The instructional leadership reviews assessment results to identify instructional areas of growth in content areas and adjust curriculum choices for following school year, as well as inform PD needs for the upcoming year.

Figure 19: End-of-Course Exam			
Assessment	Frequency	Owner	Examples of Outcomes
End-of-Course Exam	End of year	Dean of Curriculum and Instruction, teachers	<ul style="list-style-type: none"> <li>Next grade level teacher identifies content requiring remediation for students from previous year</li> <li>Leadership determines curricular adjustments for the following school year based on results</li> </ul>

Alliegiant Prep will have a “Data Wall” that displays student behavior, attendance, and academic data points. This wall serves as a reminder of what the school values and must continue to collect and use to respond to and address student skill gaps. **4. Student Performance Information Systems.** Then NWEA MAP and STEP provide valuable student growth and achievement data. Leadership and teachers access this data via an online data management tool such as Illuminate.<sup>33</sup> Teachers will enter student STEP assessment responses directly into the “STEP Tool” which allows teachers to have immediate access to cohort results and create action plans to identify literacy skills specific groups of students have yet to master. NWEA MAP results are accessible to the Head of School and instructional leadership team on an online platform. The leadership team will provide MAP results to teachers after they have been reviewed and classroom, grade-level, and school wide growth goals have been identified. We will use Student Information Systems such as PowerSchool for compliance reporting and data security, warehousing student demographic data, attendance management and reporting, and standard-based grading and reporting. We will utilize Dean’s List to track student attendance and Lifework monitoring. Our Operations Manager will manage this system and train staff on how to use it. **5. Data Analysis Training and Support.** During our three-week Summer PD, teachers receive extensive training from a University of Chicago STEP trainer to ensure they are fluent on how to administer and upload student assessment results. The Operations Manager works with the Head of School to ensure all staff has a STEP account and can input student data and access the STEP data reports. Through the Building Excellent Schools Fellowship, Lead Founder and Proposed Head of School Rick Anderson has received training on data analysis and creation of data action plans. Following the Fellowship, he will work with a Building Excellent Schools Leadership Coach who will support with data analysis as needed. **6. Corrective Actions.** If the school is not making positive growth towards an internal goal, or goal set by the ICSB or Indiana DOE, the

<sup>33</sup> The Education Intelligence Platform. (n.d.). <https://www.illuminateed.com/>.

Chair of the Academic Achievement Committee will confer with the Head of School to build a Task Force to (1) identify and address the challenge and (2) ensure a clear corrective action plan is put into place. The Committee is comprised of members of the Board, school leadership and instructional leadership teams, and other individuals as invited by the Board with experience relevant to addressing the challenge.

## SECTION III: IMPLEMENTATION PLAN

### LEGAL STATUS AND GOVERNING DOCUMENTS

---

1. **Governance Documents.** Please see **Attachment 10.**
2. **Bylaws.** Please see **Attachment 10.**
3. **Statement of Assurances.** Please see **Attachment 11.**

### HUMAN CAPITAL

---

#### School Staffing Structure

1. **Organizational Charts.** Please see **Attachment 12** for Y1 and Y8 (full capacity) organizational charts.

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

**1.Strategy and Timeline for Recruiting and Hiring.** High-quality teachers are critical for reaching our ambitious end-of-year academic goals. Research suggest that, among school-related factors, teachers matter most.<sup>34</sup> We will recruit from both the local and national levels including: local colleges and universities, Teach For America, TNTP, and Teach Plus. We will also leverage Building Excellent Schools and Teach For America’s national network of educators. We will routinely work with organizations and list-serves to identify, recruit, and develop teachers that are mission aligned, eager to grow, and willing to work hard on behalf of our students. To amplify our efforts, we will leverage our website, newsletter, and social media accounts to spread the word about current and future staff openings. During the hiring process we look for individuals who: have an unwavering belief that all students can achieve at high levels, demonstrate a deep understanding and respect for challenges that our students/families may face, believe high expectations and structure create a safe learning environment, demonstrate receptiveness to feedback and growth in their profession, and are committed team players. We will leverage Lead Founder Rick Anderson’s robust network of educators that he has developed to identify teacher talent. To identify top teacher talent, we will utilize the following hiring protocol: resume screen, short response to situational questions, phone interview, demonstration lesson and in-person interview. During the demonstration lesson and in-person interview, we will provide lesson feedback and the candidate will be given the opportunity to reflect on their own performance. In some cases, we will provide an opportunity to reteach the lesson following feedback provided. We will also utilize student and adult situational scenario questions to measure instincts and understand how candidates make decisions. This rigorous interview process ensures the teacher is a mission fit and has the necessary soft and content specific skills to be successful, and that the individual truly wants to be a part of a fast-paced, goal-oriented, feedback-driven organization. We anticipate hiring classroom teachers with a minimum of two years of classroom teaching, and a demonstrated track-record of success in similar settings. For novice teachers, we will grow and develop them in our co-teacher role, giving them the training and coaching to develop into classroom teachers. Regardless of being a classroom teacher or co-teacher, both are required to own student culture

---

<sup>34</sup> Understanding Teachers’ Impact on Student Achievement. (n.d.). <http://www.rand.org/education/projects/measuring-teacher-effectiveness/teachers-matter.html>.



and learning to ensure all students are acquiring social and academic skills needed for college success. **2. Staffing Plan.** We will hire, train, develop, and retain staff able to support our Lower (K-4) and Upper (5-8) school model. Our K-8 will start with and continue to have one Head of School, with a Lower Academy Dean of Curriculum and Instruction (DCI) and Dean of Students (DOS) and an Upper Academy Dean of Curriculum and Instruction and Dean of Students by Y8. The Head of School will work directly with the Lower and Upper Leadership teams to ensure academic vertical alignment, teacher development and support, and a stable school culture providing students with structure but gradual growth of student ownership and responsibility as students matriculate to the Upper Academy. Founder and Head of School Rick Anderson will identify teachers who have demonstrated exemplar student achievement, a high capacity to grow, professionalism, and have internalized Allegiant Prep academic and behavior expectations to potentially grow into members of the leadership team. When hiring for a Leadership Team member we will look externally but will prioritize developing talent from within to assume Operational, Instructional, and Cultural leadership positions. The Head of School will work with the leadership team to develop a deep bench of leaders to sustain Allegiant Prep’s model into the future. As the instructional leader of the school, the Head of School will assume coaching teachers in Y1; in subsequent years they will continue to support the DCIs by providing coaching to specific teachers. Our Reading Teachers are responsible for leading our phonics, phonemic awareness, and fluency components of literacy. Scripted curriculum such as Reading Mastery will allow them to focus their energy on lesson plan internalization and execution. Reading Teachers will work closely with the classroom teacher, and leadership team to minimize the learning curve and move into a classroom teacher position within a few years. Allegiant Prep will comply with all federal requirements for “highly qualified” for each position, all related documentation (i.e. transcripts, test scores, and Indiana Department of Education Teacher assessment data) related to “highly qualified” status, and a complete background check before hiring. **3. School Leaders and Teacher Evaluation.** Weekly teacher classroom observations and check-ins are connected to each teacher’s semi-annual evaluation. In Y1, the Head of School leads all teacher evaluation meetings; in subsequent years, the Head of School, Dean of Curriculum and Instruction, and Dean of Students manage evaluations based on coaching responsibilities. Our culture is grounded in consistent feedback, teachers are formally observed at least twice per week, with a 30-minute check-in at least once per week. During these meetings, the school leader and teacher have access to a shared document which has a running record of coaching conversations objectives/outcomes, areas of strength and growth. Teachers come to formal evaluation meetings aware of their development and growth in the classroom. Teacher growth and evaluation is also a reflection of our leadership’s ability to grow and develop talent. During Summer PD, the Head of School goes over the six teacher evaluation components: Instruction, Assessment, Curriculum, Classroom Management, Professionalism, and Professional Development. The Head of School is evaluated annually by the Board of Directors. The Board will identify evaluative measures to benchmark performance and determine Head of School effectiveness. Evaluation metrics include: academic achievement, operational goals, staff retention, talent development, enrollment, attendance, and parent satisfaction based on annual surveys given to parents and families. The Board will provide the Head of School with an annual evaluation; this evaluation will be a part of their personnel file. **4. Unsatisfactory Leadership and Staff Performance.** Improvement plans will be used for staff and school leaders not meeting performance and/or professional standards outlined in their job description. A Performance Improvement Plan (PIP) will be created to set defined goals for improvement over a specific amount of time. Through the duration of the improvement plan, school leadership will frequently and directly observe the performance of the staff to track progress towards goals. Once an improvement plan has been created, the staff and school leadership will meet formally at least twice during the duration of

the improvement plan discuss progress towards achieving outlined goals. In the instance where an employee does not make adequate progress towards identified goals, they will have received frequent observations, coaching, and feedback to improve prior to being terminated. The Head of School would be placed on an improvement plan via the Board's Academic Achievement Committee. The Head of School will directly manage all school staff member improvement plans in Y1; in subsequent years, improvement plans would be created and implemented by DCIs with the Head of School providing oversight. In the case of vacancies, the Head of School would manage this process directly to identify, interview, and hire staff.

**5.Compensation System.** We have used the local school district's pay scale to create competitive starting salaries for our staff. All employees will have the opportunity to enroll in monthly health care insurance program. In addition to compensation we value teacher development and growth, we strategically invest 24 full days of PD for our staff, and 2 hours of PD each Friday. Teachers are also observed weekly and receive specific coaching unique to areas of growth to grow them as leaders in their classrooms.

## PROFESSIONAL DEVELOPMENT

---

**1. Professional Development Offerings.** We strategically invest 24 full days of PD during the academic school year, 15 of these days are prior to the students first day during Summer Orientation. Teachers do not just learn about our culture of high expectations in theory - they practice and receive feedback on everything from giving student(s) directions to stand up behind their desks to ensuring the appropriate questioning is being used in lesson plans to accurately measure students' mastery of the objective. Each week, all members of our staff including the leadership team are observed and receive feedback unique to their role and growth areas. Teachers our observed at least once per week by a member of the leadership team, followed by a 30-minute coaching session to isolate 1-2 specific skills to improve student engagement and academic outcomes. Each Friday we engage in 2 hours of staff when teachers engage in whole group and content specific PD, grade level planning, data analysis, and strategic work-time. The Friday PD calendar objectives are identified over the summer; leadership meets each week to incorporate real-time PD objectives based on school wide trends. Teachers will have the necessary support to become more effective at growing our students toward end-of-year academic and character goals.

**2. Leadership Development and Support.** Lead Founder and proposed Head of School Rick Anderson brings a track-record of relevant work to our school. Mr. Anderson has experience as a teacher and a school leader at two high performing Building Excellent Schools (BES) in Memphis, TN. His school leadership roles include serving as a 6-8 Dean of Students, 6-8 Head of School, and most recently a K-5 Head of School. In these roles Mr. Anderson gained relevant and direct experience in hiring, training, and onboarding new staff, planning and executing all staff Summer PD, creating and implementing teacher weekly observation and feedback cycles, managing 30+ adults and ensuring the safety and learning of 300+ students, identifying growing and developing a leadership pipeline, and investing and equipping families in working with the school to ensures student success. Mr. Anderson received a full year of leadership training as a Dean of Students through Building Excellent Schools Lens program, designed to develop awareness and leadership skills to equip and inspire adults and students. As a Teach For America alumni, Mr. Anderson continues to leverage the national alumni base and has access to content experts, teachers, and school leaders across the country. Mr. Anderson brings the unique background of teaching and leading at BES schools with similar focuses on high expectations and college preparedness. As a BES Fellow, Mr. Anderson will continue to leverage a network of over 80+ schools beyond his Fellowship year to receive PD from proven school leaders, and share and access best practices. Mr. Anderson has built and will continue to maintain strong relationships with Freedom Prep Academy in Memphis, TN, and Great Lakes Academy in Chicago, IL (Letters of Support in **Attachment 9**). Post-authorization, BES will continue to provide Mr. Anderson

with the necessary coaching and support to successfully navigate the founding years, to include weekly conference calls to discuss topics relevant to ensuring a successful open in 2018, and school visits in Y0, Y1, and Y2 to provide feedback and school-wide performance audits. Allegiant Prep anticipates joining the Network for Quality Education (NQE) to have additional access to opportunities for school leadership development. **3. Professional Development Builds Teacher Capacity.** Before students’ first day of school teachers receive over 100 hours of focused training on school culture expectations, school wide behavior system, curriculum, and lesson plan execution. Teachers welcome students to the school equipped and clear on the skills and mindsets necessary to ensure students reach or exceed end of year goals. Below you will find a breakdown of summer orientation and Professional Development during the year that builds teachers capacity to improve student achievement. **4. Professional Development Before School Opening.** Each school year will begin with three full weeks (15 days) of **Summer Orientation**, structured to ensure that on day one students they are greeted by a unified group of adults prepared to hold students to high academic and behavior expectations. During the three-week orientation, we focus on: Mission and vision alignment, staff unity, culture expectations, teacher taxonomy training, Master Teacher video analysis, systems and procedures, teaching all learners, lesson execution practice, and student orientation practice. Trainings is led by internal staff and external vendors (i.e. STEP training); teachers receive skill building practice, content team time, and structured work time. **Figure 20** provides a sample schedule for Summer Orientation. In Y1 the Head of School represents the “School leader”; starting in Y2 and beyond, the School leader will be a combination of the Head of School and the leadership team.

Figure 20: Summer Orientation Schedule		
Week	Focus	Activity (Owner)
Week 1	Mission, Vision, Culture	<ul style="list-style-type: none"> <li>• Whole group icebreaker(s) (School Leader)</li> <li>• Vision training in action (School Leader)</li> <li>• Core Value training (School Leader)</li> <li>• Human resources/onboarding (Operations Manager)</li> </ul>
Week 1-2	Taxonomy Training, Curriculum and Instruction	<ul style="list-style-type: none"> <li>• Taxonomy training (School Leader)</li> <li>• School-wide systems and procedures (School Leader)</li> <li>• Curricular vision and grade-level scopes and sequences (School Leader)</li> <li>• Cognitively guided instruction session (School Leader)</li> <li>• STEP assessment administration (External Provider)</li> <li>• Reading Mastery training (School Leader)</li> <li>• Assessment tools and action plan creation (School Leader)</li> <li>• Structured Classroom set up time (Teachers)</li> </ul>
Week 3	Lesson Execution, Special Populations, Student orientation practice	<ul style="list-style-type: none"> <li>• Teachers practice key elements of week 1 student lessons (Teachers)</li> <li>• Intervention process overview (Special Education Teacher)</li> <li>• IEP, 504s, modifications, accommodations, and referral process overview (Special Education Teacher)</li> <li>• Review ELL referrals and services and SIOP strategies (School Leader/ESL certified teacher)</li> <li>• Structured Classroom set up time (Teachers)</li> <li>• Practice for week 1 student orientation (entire staff)</li> </ul>

To focus and optimize Summer Orientation training, teachers will be provided lesson plans for all content areas unit 1 (Read Aloud, Reading Mastery, Guided Reading, Reading Comprehension, Writing, Science/Social Studies) lessons during the first week of PD. This will allow teachers to focus on mastering the school culture and internalize school wide systems and routines. During the final week of Summer



Orientation teachers will execute significant portions of their week 1 lesson plans and receive feedback from the Head of School. This strategic investment allows teachers to focus 100% of their energy on lesson plan execution when students arrive. As teachers start developing lesson plans for subsequent units they have exemplars from the unit 1 plans that were provided to them. **5. Professional Development During the Year. Weekly Professional Development.** Every Friday, we have an abbreviated school day for students with dismissal at 2:00PM, allowing for a 2 hours of PD each week. The leadership team meets during the week to identify school-wide trends that need to be addressed. The weekly Friday PD calendar will be created in advance of the school year and teachers will receive the Friday PD agenda each Thursday so they have time to prepare required materials prior to meeting (i.e. laptops, student data, student work). Friday PD will include a combination of Grade Level Team Meetings, during which teachers work in grade levels to collaborate and address student academic and culture gaps, and action plan accordingly. **Weekly Observations.** Each teacher is observed at least twice per week and participate in one weekly coaching session with a member of the leadership team (Y1 Head of School, subsequent years Head of School, Dean of Curriculum and Instruction, and Dean of Students). The weekly observation cycle includes a classroom observation to identify what a teacher is doing well and 1-2 growth areas to push classroom culture or student academic growth. During the follow-up weekly coaching session, the leadership team member would have the teacher role-play asking questions from the next lesson to practice an instructional skill. This fast and intentional coaching cycle allows teachers to get individualized and specific feedback that they can apply in class to empower them as the instructional leaders of their classroom. **Data Days** are held after every MAP and STEP assessment. Teachers come equipped with their latest student assessment data and work in grade level teams to identify what questions students did not master and the underlining skills that still need to be developed. After analyzing student assessments, teachers work to create action plans that outline the steps that will be taken to address gaps identified. Action plans may include re-grouping students' literacy groups, strategic re-teach, re-ordering sequence of objectives to be taught, identifying additional individual remediation time for specific students. Teachers conclude Data Days with clear action plans to build student skills. Staff will also can attend **External PD** to continue their growth as instructional leaders. For example, a reading teacher may be invited to attend a *Great Habits, Great Readers* training to further develop strategies to effectively teach Reading Comprehension. In later years, teachers will have the opportunity to grow into Grade Level Team Chairs, or members of the instructional or school wide leadership team. **6. Professional Development Evaluation.** In addition to the development of individual teachers, as a leadership team we will reflect on our overall PD program once per quarter. Professional Development audits will include all members of the leadership team to reflect on the four levers of PD (weekly PD, classroom observations, Data Days, and external PD). The leadership team will identify whole-team skill gaps and areas where expectations are not being met. Action plans will be created to address these gaps, for instance if there is a specific group of students that continue to not make adequate progress towards end-of-year reading goals, the leadership team would discuss implementing focused interventions or structural shifts to provide them with more remediation. When solutions are not identified that address gaps in our PD program we will use the Building Excellent School network of schools to solicit feedback to ensure PD inputs are yielding outputs that set the school up to meet end-of-year goals. This internal system of evaluation ensures we continue to provide an excellent college preparatory education for our students and families. We will have a staff survey that provides feedback on our PD program. We will use this feedback to improve internal PD to ensure we are being responsive to teacher input and teacher growth.



## START UP AND OPERATIONS

---

**1. Start-Up Plan.** Please see **Attachment 13** that includes operational start-up, hiring, facility, and curricular planning, Board transition to governance, and other relevant tasks and projects. Proposed Founder and Head of School Rick Anderson will continue to receive support from Building Excellent Schools in the planning year and the first two years of school operation from an experienced school leader who serves as BES coach. Mr. Anderson will continue to have access to resources from the BES network of high-performing schools. **2. Transportation.** Allegiant Prep is a proposed neighborhood school for students and families on the Westside of Indianapolis. We will focus recruitment efforts on attracting families in and around the Haughville area. Students will get dropped off at school by their family each day. In subsequent years as students get older, families may decide to have their children walk to school, or take public transportation. We will identify a location that is centrally located on the Westside easily accessible to public transportation. Arrival to and departure from school will be safe and efficient. We will plan three **Field Lessons** during the academic school year (one per trimester). One will be a Community Service trip on the Westside, and the remaining two will be outside of the Westside area (i.e. Children’s Museum, Conner Prairie). We have allocated \$15 per student in our Y1 budget for Field Lesson bus transportation. We will identify a bus vendor such as Dunbar Transportation to provide this service. In compliance with McKinney-Vento Homeless Assistance Act, the Head of School and Operations Manager in Y1-Y3 (with support from Coordinator of Student Supports in Y4) will work directly with families of **Homeless Students** to ensure we identify solutions so that they are present each day and remain in school. In accordance with the Disabilities Education Act, we will provide transportation for **Students with Disabilities** as required. We foresee serving a small number of students who may require specific transportation to and from school. The Operations Manager in Y1-Y3 (with support from Coordinator of Student Supports in Y4) will work with vendors to ensure these students’ transportation needs are met. The Special Education Teacher(s) in Y1-Y3 (Y4 Coordinator of Student Supports) will provide support to ensure all IEP transportation needs are met. **3. Safety and Security.** Student, staff, and visitor safety is our number one priority. Teachers cannot teach and students cannot learn in unsafe conditions. Our policies will be in accordance with all applicable federal and state health and safety laws in relationship to public school operations. Our school security system will allow for school office staff to identify, confirm, and monitor individuals entering and exiting school grounds. School doors will be locked at all times and visitors will be required to sign-in, wear school provided badges to identify themselves, and sign out before exiting the building. In Y0 we will work to secure a facility, in addition the Board will review and approve policies covering fire protection, accident reporting procedures, warning systems, emergency drills, and traffic safety as well as any other policies required in compliance with Indiana state law. The Operations Manager will be responsible at the school for ensuring the school is meeting all State, Federal, and Board Safety and Security policies. **4. Technology Specifications and Requirements. Not Applicable.** **5. Insurance Coverage.** Please see **Attachment 14** for documentation of insurance coverage estimate.

## FACILITY PLAN

---

**1. Process for Identifying a Facility.** We are committed to identifying a facility option within or around the 46222 (Haughville and surrounding area) zip code. The Westside is the number one area of need for “high quality seats” in Indianapolis, identified through the IFF quality seats analysis of over 20 zip codes in the city. Proposed Founder and Head of School Rick Anderson has been working to extend his knowledge base and build family and community support for Allegiant Prep’s innovative college preparatory program. To assist us in identifying a facility to meet our physical space and programmatic needs, we are working with IFF, which works with non-for profits around the country to identify facility



space. Local IFF clients include Purdue Polytechnic, Herron High School, Circle City Prep, Marion Academy, and KIPP. IFF is engaged with two renovation projects with The Foundation Against Companion-Animal Euthanasia (FACE) and Southeast Neighborhood School of Excellence (SENSE). IFF will contract with Allegiant Prep to represent us in all aspects of the real estate development process, from predevelopment and permitting, through school occupancy and project punch list. IFF's services will include, but not be limited to, site and economic feasibility, zoning and building code analysis, and suitability for the academic program. IFF will manage procurement services if needed. Both parties' goal is to identify and obtain a facility that meets program needs and fits within our financial model to move into in 2018. The Project team will include the proposed Head of School, IFF, an architect with charter school experience (identified through competitive process), a general contractor with charter school experience (identified through competitive process), and once hired the School Operations Manager. **Facility Components: Classrooms.** 750 feet, classroom is visible from one vantage point, prefer classrooms that have windows/access to natural light, be in the shape of a square, ideally Kindergarten classroom have restroom inside of classroom **Office.** Main office space near entrance of building, room for desk in main office, waiting space in main office, one private conference room, two offices of 600 square feet. **Teacher Work Room.** One open space, room for teacher desks, room for curriculum materials, room for copier, room for laminator. **Bathrooms.** One adult restroom, two student restrooms in Y1 and additional restrooms in Y3-Y5. **Multipurpose Space.** Open space 2,000 square feet (Breakfast, lunch, PE, Community Circle). **Outdoor Play Space.** 5,000 square foot fenced outdoor space (potential playground area). **Parking/Drop-off.** Sparking space for 15 cars (room to grow to 30+). Drop-off area for buses and passenger vehicles. **Occupancy.** Schools require a certificate of occupancy. The landlord will be responsible for providing Allegiant Prep a current certificate of occupancy. Allegiant Prep acknowledges that it is subject to the public bid laws for erection, construction, alteration, improvement or repair of a public facility or immovable property, pursuant to Indiana requirements. **ADA Compliance.** We prefer a facility that already meets all requirements as per the regulations of the Americans with Disabilities Act, or Allegiant Prep Charter School will ensure our facility meets all guidelines prior to the first day of classes. We will consider the following when evaluating sites: Proximity to our target population (low-income, minority, English Language Learners); Transportation options accessibility; Cost to lease, renovate, and maintain over time; Parking availability and outdoor playground options; Safety and security for students; Potential to increase space over time. The Board will provide approvals and oversight of the Facilities search through the Finance and Facility Committee and then the entire Board of Directors. Post authorization, IFF will begin the Facility search; at this point of this application submission a physical facility has not been identified but proposed Founder and Head of School Rick Anderson has identified three intersections on the Westside where the facility search will be focused: 16<sup>th</sup> and Tibbs, 14<sup>th</sup> and Martin Luther King, and 34<sup>th</sup> and Lafayette. **Figure 21** outlines our Facility Acquisition Timeline.

<b>Figure 21: Facility Acquisition Timeline</b>		
<b>Date</b>	<b>Action</b>	<b>Responsible Party(ies)</b>
Sept- Dec 2016	Toured three facilities in target community	Lead Founder
Jan-Jun 2017	Ongoing facilities tours and site visits on Westside	Lead Founder
June 2017	IFF starts formal facility search for Allegiant Prep	IFF Representatives
June 2017	Form Facility Committee (limit to 3-4 people max)	Founding Board members, Rick Anderson, Community Members
Jun-Dec 2017	Monthly board updates on facilities progress, Monthly facilities committee meetings	Facility Committee, IFF Representatives

May-Jun 2017	Architect Selection Process: RFP's, Interviews, Contract negotiation, Architect selection	Facility Committee, IFF Representatives
Jun-August 2017	Site Schematic, Work Design/Scope; Preliminary Cost Estimates, General contractor preliminary interviews	Facility Committee, Architect, IFF Representatives
Aug-Sept 2017	Select top two sites; Revised Schematic Design and Cost Estimates, Letters of Intent on top two options General Contractor RFP and selection	Facility Committee, Contractor, IFF Representatives
Sept-Nov 2017	Negotiate lease/purchase terms on top site; Revise cost estimates; Proceed w/Design/Development on top site	Lead Founder, IFF Representatives, necessary consultants
Nov-Jan 2018	Begin loan conversation with lenders- CDFIs, banks, etc.; Construction Documents submitted for permitting; Project goes out to bid	Architect
Jan 2018	Execute lease; Close loan with project lender (if loan is necessary)	Facility Committee, Full Board, IFF Representatives
Jan-June 2018	Developing a space plan, analyzing demographics, and conducting extensive market searches.	Facility Committee, Full Board, IFF Representatives
Feb-Jul 2018	Project construction on tenant and site improvements Furniture, Fixtures, Equipment Selection and Procurement	Facility Committee, Full Board, IFF Representatives, Operations Manger
July 2018	Obtain Certificate of Occupancy	Head of School and Operations Manger
July 2018	Staff and Furniture Move-In	Head of School and Operations Manager
August 2018	School Start	Head of School and Operations Manager

## BUDGET AND FINANCE

**1. Internal Systems and Processes.** Allegiant Prep will ensure all internal financial systems and processes are in accordance with generally Accepted Accounting Principles (GAAP) and any laws and regulations that govern Charter Schools in Indiana. We will develop, maintain, and evaluate all internal financial policies and procedures to ensure the integrity of our finances. We intend to outsource back-office functions to a local provider such as Goodwill Industries or a national provider such as EdTec, and contract for full service support services: accounts payable processing, accounting, payroll, and financial statement development. The selected provider will provide additional support on reporting compliance, budgeting and forecasting, cash flow planning, scenario building, and general best practices from their experience working with other charter schools. The Head of School and Operations Manager will primarily manage the relationship with the back-office provider, and will be responsible for working with the provider staff across the transactional areas to ensure the back-office provider has all required information to provide services. **Purchasing and Accounts Payable.** The Operations Manager will manage the purchase order and invoice approval process, and all direct communication with vendors. S/he will solicit bids when applicable and bring contracts to the Board for approval. Approved invoices, based on the adopted budgeted and consultation with Head of School, will be submitted to the back-office provider for processing. Invoices will be submitted with coding based on the adopted budget and the implemented

chart of accounts that conforms to state coding standards. The provider will enter the transactions and generate a report for review and quality assurance. Once the Operations Manager has reviewed the report and Head of School has approved payment, the provider will issue payment to those invoices and vendors. When an invoice needs a second signature and approval, the provider will solicit said approval from the designated second signer such as the Board Chair or Treasurer. Once payments have been issued, the provider will generate a check register which identifies all payments made for reference and an aging report for unpaid invoices. Each month, the Operations Manager will prepare a combined check register for all payments made on behalf of Allegiant Prep for review by the Board as part of an additional layer of financial oversight. Credit card and debit card transactions will have a separate process for entry to ensure that information is being entered into the accounting system and all back-up and receipts are being collected. In cases of regular invoices, and credit and debit card activity, the school will retain physical copies of all purchase and invoice documentation, filed by vendor, for each fiscal year. The back-provider will keep electronic versions to ensure Allegiant Prep has adequate documentation. In the case of payments to independent contractors, the Operations Manager will collect W-9s from all eligible vendors. The provider will then complete all the required tax reporting for vendors to IRS. **Accounting.** The Operations Manager will submit bank statements and deposit logs each week. Based on the adopted budget and the state chart of accounts, revenue will be entered and coded by the provider. Other financial activity not originating within the accounting system, for example payroll activity, or otherwise not processed through the accounts payable system, will be entered by the provider accounting staff. Regardless of information being submitted or not, the provider will complete weekly cash reconciliations to clear checks issued through accounts payable processing and temporarily recognize banking activity until documentation is supplied. Other ancillary support functions by the provider will include maintaining a fixed asset schedule and ensuring all expenses are capitalized and depreciated as appropriate. The provider will make sure transactions that should be applied to the balance sheet are correctly recognized like prior year accrued revenues and expenses or the recognition of the principal portion of loan payments. Monthly, the general ledger will undergo routine maintenance to ensure items are properly coded. The provider will work closely with the independent audit firm selected by the Board to ensure it has all required documentation and schedules developed each year for the audit process. **Payroll.** The Operations Manager will maintain employee files, including but not limited to, employment agreements, certifications, credentials, W-3s, I-9s, and other payroll information like salaries, wages, deductions, garnishments, and direct deposit information. On a bi-weekly basis, the Operations Manager will submit any recurring and new payroll information to the provider, who will collate all information, ensuring there are no inconsistencies, potential errors, or missing documentation, and generate a payroll preview through a payroll processor such as Paychex or ADP. This payroll preview will then be sent to the Head of School who will approve or modify payroll as needed. After approval, the provider will process the payroll and coordinates delivery to the school and employees. On a quarterly basis, the provider will be responsible for all required tax reporting to IRS and any state agencies. In addition to the standard payroll processing, the provider will manage reporting related to retirement and plan administration as needed. **Ongoing Financial Management & Internal Controls.** One compelling reason to contract with a back-office provider is the segmentation of duties and responsibilities otherwise not possible for a smaller school with limited staff. The provider will supply different staff with different permission levels for various back office functions. For example, the staff member who pays vendors will have the ability to reconcile statements. Conversely, the accountant reconciling the books has no access to cut checks. Because depositing of revenue and purchasing is done by school staff and the entry and recording is done by the provider, there will be a natural system of checks and balances that arise from that



separation of duties. Each month, the provider will prepare standard financial statements, including an income statement, balance sheet, statement of net assets, and cash flow statement. This information will be completed with a budget vs. actual analysis and trending analysis to ensure the school is on track to meet its adopted budget. The provider will prepare a monthly or quarterly analysis to the Board and Head of School on the ongoing finances of the school. As part of monthly Board and Finance Committee meetings, the Head of School and Board will review these documents. As variances become material between the approved budget and actuals and the projections suggest a new set of circumstances or needs, both staff, the Finance Committee, and the Board will revisit the approved budget and determine if the budget should be amended or if corrective action is required to align activity back within the approved budget. During Finance Committee and Board meetings, the provider will work with the school to identify potential conflicts of interest, contractual issues, and issues requiring board approval. All financial statements will be maintained using generally accepted accounting principles (GAAP) promulgated by the Governmental Accounting Standards Board (GASB), accounting requirements for charter schools, and any other requirements, as outlined in the Indiana Charter School Law. The fiscal year will be July 1 through June 30. Allegiant Prep will adopt a set of financial policies and procedures that incorporate internal control measures from various other charter schools and that have been reviewed by several audit firms for adequacy – they have been provided in **Attachment 16. Audit**. Allegiant Prep will contract with a state-approved audit CPA firm with Indiana charter school experience and expertise. The Board, with the school administration’s assistance, will request proposals for audit and select the audit CP firm, which will report directly to the Board. After an audit firm is selected, the firm will present to the Board an overview of the audit process, and the roles and responsibilities of all involved parties. When the audit process begins, the Head of School and provider will ensure the audit firm has access to all necessary financial information and records and non-financial records and documents maintained by the school in advance of actual audit field work. During the audit field work, any other documents requested by the firm will be provided in a timely manner. After the audit is complete, the Board, along with the Head of School and provider will review the audit report and management letter. The audit firm will present the findings to the Board. Should the audit report or management letter include any findings, including but not limited to material weakness or significant deficiencies, the school will address the issues flagged in a formal action plan on how the issues will be resolved. Copies of the final audit report will be forwarded to the state and authorizer, and other required agencies. The annual audit will be done in accordance with all federal, state, and local auditing requirements and standards, including those required of public charter schools in Indiana, in addition to other conditions or criteria required by the Indiana Charter School Board. Allegiant Prep will retain the selected firm for any other required reporting, including but not limited to, the filing of its annual 990 return with IRS. **Budget**. The budget cycle will start in early spring with a working draft developed and brought to the Finance Committee of the Board subsequently thereafter. The main role and responsibility of the Board will be to adopt a balanced budget that adequately meets and addresses the strategic vision and mission of the school, as laid out within the charter application and input and information from school leadership and consulting parties. As part of that responsibility, the Board is responsible for ensuring the budget reflects all compliance requirements with respect to federal and state resources and is a prudent and reasonable use of public funds. From there, the responsibility to execute against the budget is delegated to the school administration, including the provider. The budget will reflect the operating and spending parameters around which day-to-day decision making will be managed. The Board will have the responsibility of accountability, ensuring the school team is acting in a manner consistent with the adopted budget, priorities, and restrictions. As part of this accountability framework, the school administration and provider will inform the Board of changes

in information, conditions, and other matters that might otherwise inform the Board. The annual budget for the school will be developed by the school administration, in conjunction with the provider. The Head of School will solicit school staff for budget input and engage them in a strategic planning exercise each year to ensure budgeting is aligned to mission and intended outcomes. The Head of School will rely on the strategic priorities and mission identified in the approved charter application to inform the budgeting process. The provider will conduct analysis and provide knowledge and expertise around charter school funding, observed spending trends, and other industry benchmarks. The provider will help to bring the technical work together of the budget pro forma, along with clear assumptions and notes. In a publicly accessible meeting, the Finance Committee will analyze the budget draft and provide recommendations to the broader Board. The proposed budget with recommendations will be brought forward for presentation at a publicized and open Board meeting, and then for approval at a subsequently publicized and open Board meeting after the initial presentation. June 30th will be the absolute cutoff to have a Board-approved budget in place; copies of the approved budget in the required format will be provided to the required agencies by the required deadlines. In all cases, all public meetings will be properly noticed to the public to allow for participation. As a public entity, Allegiant Prep understands that documents such as the adopted budget, its interim and annual financial reports, and audit reports are considered public records. Such documents will be made available upon request in line with any other standard public records request. Internal Systems are detailed below: **Accounting.** Used to enter and record all of the schools' transactions; verify that recorded transactions actually took place; create description of transactions that is classified for financial reporting; Ensure transactions are recorded at appropriate amounts; record time period in which transaction was made; ensure transactions were authorized by the appropriate person. **Purchasing.** School records expense on an accrual basis of accounting; Head of School authorized to execute Board approved budget; Head of School can only make expenditures under \$10K; Expenditures over \$10K must be co-signed by the Treasurer or the Chairperson of the Board; expenditures over \$75K will have a formal RFP submitted to identify the most qualified contractor. **Payroll.** Payroll will be performed by third-party vendor such as ADP. **Annual Audit.** Financial statements audited annually by independent audit firm, identified by Board via a recommendation from the Finance Committee; audit firm will be hired by June 30<sup>th</sup>, will perform audit before the start of the new fiscal year; Audit includes: accuracy of school's financial statements, attendance accounting, revenue accuracy practices, and the school's internal controls. **Segregation of Duties.** Hierarchical structure to ensure tasks are divided to guard against one individual having ability to make an accounting error (knowingly or unknowingly); compensating control will be developed on school level if budget constraints do not allow a sufficient amount of employees. **Processing Controls.** Source document matching; clerical accuracy of documents; general ledger account code checking. **Reconciliation.** Process of checking for errors after transactions have been posted and general ledger has been run. **Securing Financial Data.** Accounting software accessible to Head of School, Operations Manager, Back Office Provider; each will have separate log-in credentials; hard copies of financial data will be in a locked and secured cabinet within the school. **Risk Management.** Mitigating risk involving internal and/or external factors that might adversely affect the ability to properly record, process, summarize, and report financial data. **2. Year Pro-Forma Budget.** Please see **Attachment 15** for budget. Please see **Attachment 16** for Budget narrative.

#### **4. Additional Requirement for Pre-Existing Nonprofit Organizations. Not Applicable.**





**ALLEGIANT PREP**  
ACADEMY

# Attachment 1

Applicant Group Resumes



# RICK A. ANDERSON

8928 Ashford Castle Drive Apt. 1425 317.619.9464  
randeron@buildingexcellentschools.org

## PROFESSIONAL EXPERIENCE

**Building Excellent Schools**, Boston, MA/ Indianapolis, IN  
**Fellow**

**Summer of 2016 - Present**

Building Excellent Schools (BES) trains leaders to take on the demanding and urgent work of leading high-achieving, college preparatory urban charter schools. The BES Fellowship – a rigorous, yearlong, comprehensive training program in urban charter school creation and leadership – has resulted in the establishment of more than 80 schools in 14 states and the District of Columbia. BES schools educate over 20,000 students annually, in schools that span grades K-12. BES holds the core belief that academic performance drives every element of a school, including design, leadership, culture, decisions and governance.

**Freedom Prep Academy**, Memphis, TN

**Head of School, Elementary School**

**July 2015 – July 2016**

**Head of School, Middle School School**

**July 2014 – July 2015**

Accountable for equipping and leading 60 educators, and more than 750 students with the skills/mindsets to exceed with academic and cultural goals; Led individual and small group meetings with each student to the school family to gain buy in on school expectations and vision of excelling in college and life

- Designed family nights where teachers and school leadership built parent/guardian capacity to ensure students academic success
- Created school-wide direct report communication system to create consistent feedback and observation schedule for teachers
- Developed and executed three-week teacher and new student orientation that consisted of teacher behavior management training, mission/vision training, and lesson plan development/ execution training
- Accountable for ensuring Manager of School Operations effectively managed/allocated funds in 2.5 million dollar budget

**Freedom Prep Academy**, Memphis, TN

**Dean of Students**

**January 2013 - July 2014**

Accountable for investing students and adults in school wide culture and behavior system; Oversaw school morning arrival, and uniform check to ensure all students met uniform expectations; Collaborated with leadership team on a weekly basis to identify school wide trends, and create objectives for teacher professional development; Effectively communicated with stakeholders to ensure all parties were working together to ensure academic success of students; Conducted weekly new family meetings to articulate academic and cultural expectations for Freedom Prep students and teachers; Coached novice teachers on *Teach Like a Champion* behavior management taxonomies

- Created and managed individual behavior management plans for students who were not invested in school wide behavior culture system
- Observed teachers in classroom during instruction on a weekly basis to provide “real-time” feedback to ensure all students were meeting expectations
- Developed and invested all staff and students in First annual student “Spirit Week”, which consisted of a: Dress for Success day, Dress like your favorite literary character, and Cohort college day

**Freedom Prep Academy**, Memphis, TN

**Sixth Grade Social Studies Teacher**

**June 2013 – January 2013**

Developed and executed school wide professional development on student cold calling strategies; Streamlined school wide teacher communication during dismissal; created weekly elective schedule that informed adults and students on time and location of after school activities

- Refined and supplemented rigorous Social Studies curriculum
- 95% of students scored proficient or advanced on Tennessee state standardized assessment for Social Studies

**Memphis College Prep**, Memphis, TN

**First Grade Teacher**

**May 2011- June 2013**

Responsible for effective execution of Math Investigations curriculum and Reading Mastery phonics and reading program; Developed and facilitated two-week behavior and culture training workshop during teacher orientation; Developed and implemented seven-week culture lesson plan to improve overall student behavior and teacher effectiveness across First and Second grade

- 90% of students scored above median on end of year national normed assessment (Terra Nova)
- Successfully built partnership with Power Center Academy to develop school wide mentee/mentor program where scholars actively engage with middle school-aged mentors who reinforce academic and cultural goals

**Johnson & Johnson**, Springfield, IL

***Territory Business Manager***

***January 2008 - May 2011***

Utilized professional selling skills, relationship management skills, business acumen, and personal effectiveness to influence Health Care Professionals to use the OneTouch blood glucose monitor to manage patients' diabetes instead of alternative brands; Responsible for managing assigned territory budget, as well as territory business plan that highlighted specific areas of opportunity for me to grow my business towards my territory revenue goal of \$3.1 Million

**CIVIC INVOLVEMENT**

- All Pro Dad Team Captain 2015-2016, **Memphis, TN**
- Embark New Memphis Institute Founding Cohort 2013, **Memphis, TN**
- Teach For America African American Men in Education panel 2013, **Memphis, TN**
- Teach For America Corp Member 2011-2013, **Memphis, TN**
- Big Brother Mentor 2011, **Springfield, IL**
- Director/Founder of Next Up Youth Leadership Development Program 2011, **Springfield, IL**

**EDUCATION**

**Christian Brothers University**, Memphis, TN

*Masters of Education*

Fall 2014

**Florida Agricultural & Mechanical University**, Tallahassee, FL

*Bachelors of Science, Business Administration*

Fall 2008

**ALYSSA HOWARD**  
alyssa.p.howard90@gmail.com  
240 W. Hampton Drive  
Indianapolis, IN 46208  
(317) 217-0971

## **EDUCATION**

---

**Howard University**, Washington, DC B.B.A. in Accounting  
School of Business Honors Executive Leadership Program Magna Cum Laude  
Graduation: May 2013

## **WORK EXPERIENCE**

---

**PricewaterhouseCoopers**, Senior Associate, CPA, Indianapolis, IN September 2013-Current

- Works directly with PwC partners, principals, staff and clients across the nation to lead audit client engagements
- Reviews information for both national and international clients for their quarterly and annual financial statement filings
- Assisted in the timely filing of an initial public offering for a multinational public company

## **LEADERSHIP EXPERINCE**

---

- Indiana CPA Society Mentor August 2014-August 2015
- PwC National Assurance Staff Council September 2015-September 2016
- Purdue Business Opportunities Program Mentor December 2016-Current

## **LANGUAGE SKILLS**

---

- Proficiency in reading, writing, and speaking the French language

## **OTHER ACTIVITIES**

---

- Beta Alpha Psi (Professional Accounting Fraternity)- Member
- NABA (National Association for Black Accountants) - Member
- Drifters Inc., Indianapolis Chapter –Recording Secretary

# Janice K. Howard

---

## EDUCATION

Indiana Wesleyan University	Master of Business Administration	4/2015
Indiana Wesleyan University	B.S. Business Information Systems	5/2010

---

## QUALIFICATIONS SUMMARY

*Seasoned Human Resource Information System professional with knowledge of Oracle Fusion HCM, Ceridian Dayforce, Taleo Business Edition, Taleo Learn, UltiPro HRMS, SAP, and PeopleSoft, Microsoft Office, and Publisher. Over twenty years of experience in Human Resources. Effectively managed a team of five and served as subject matter expert in HRIS Data Management, Reporting, Recruitment, Workforce Compensation, and Benefit Administration:*

### *Data Management*

- Participated in the Human Resource Management System design, implementation, and system upgrade process by assessing functionality and recommending improvements.
- Maintained integrity of the data by performing quality and system audits.
- Partnered with the functional user, IS department, and third party vendors to test system upgrades.
- Identified problems and resolved database errors as necessary to ensure accurate reporting.
- Implemented and coordinated the change management function.

### *Reporting*

- Created ad hoc downloads and reports for various internal customers.
- Provided data downloads on payroll, benefits, and employment status.
- Developed user friendly reporting formats prior to dissemination of information.

### *Leadership*

- Trained end users on system upgrades and new applications.
- Provided coaching and work direction to HRIS team of five and served as resource to Human Resources generalists and managers.
- Served as subject matter expert to internal and external customer groups.
- Delivered disciplinary action when appropriate to address associate behaviors.

### *Benefit Administration*

- Coordinated the management of associate short-term disability and FMLA claims.
- Regularly communicated with benefit vendors regarding file transmissions, changes, and implementations, and status of associate claims.

### *Recruitment*

- Completed hiring process including screening, initial interviewing of applicants, conducting background checks and references, assisting with selection, making job offers, and notifying those not selected.
- Worked with management team to determine need for advertising of job openings and participated in recruitment fairs and job expos.
- Handled minor employee relations issues by coaching managers on documentation, and corrective measures.

---

## EMPLOYMENT HISTORY

Angie's List Sr. Business Analyst, HR & Payroll	6/2015 - Present
Living Water Fellowship Church Human Resources Consultant	2/2014 - Present
Republic Airways Holding, LLC via That's Good HR Contracted HRIS Manager	11/2014 – 6/2015
Roche Diagnostics Human Resources System Analyst	9/2012 – 1/2014
St. Vincent Health Human Resources Information Systems Team Lead (promoted)	3/2011 – 9/2012
Human Resources Information Systems Specialist	10/2005 – 3/2011
Early Positions: Customer Service, Systems Analyst, Team Lead, Data Specialist	4/1997 – 10/2005

---

*References Available Upon Request*

## **Tony Pearson, MPH, JD**

Associate General Counsel at Indiana University Health

---

### Experience

- **Associate General Counsel at Indiana University Health**  
May 2014 - Present (2 years 6 months)
  - **Health Care Administrator at US Navy**  
March 2014 - Present (2 years 8 months)
  - **Vice President of Corporate Affairs at HealthNet Community Health Centers**  
March 2013 - May 2014 (1 year 3 months)
  - **Director of Government Affairs and External Relations at HealthNet Community Health Centers**  
October 2012 - March 2013 (6 months)
  - **Manager of Government Affairs at Indiana University Health**  
January 2010 - October 2012 (2 years 10 months)
  - **Research Assistant to Professor Eleanor D. Kinney at Hall Center for Law and Health**  
September 2007 - January 2010 (2 years 5 months)
  - **Summer Law Clerk for the Honorable Judge Nancy H. Vaidik at Indiana Court of Appeals**  
June 2009 - August 2009 (3 months)
  - **Legislative Assistant at Hoosier State Press Association**  
January 2009 - April 2009 (4 months)
  - **Summer Associate at Faegre Baker Daniels LLP**  
May 2008 - August 2008 (4 months)
  - **Pharmacy Services Intern at Agency for Health Care Administration (Florida Medicaid)**  
January 2007 - April 2007 (4 months)
- 

### Certifications

#### **Certified in Healthcare Compliance**

Compliance Certification Board      March 2014 to July 2016

---

### Education

#### **Indiana University Robert H. McKinney School of Law**

Doctor of Law (JD), Health Law Concentration, 2007 - 2010

Activities and Societies: President - Black Law Students Association

#### **Leadership Indianapolis - Stanley K. Lacy Executive Leadership Series, Class XL**

2015 - 2016

#### **Florida Agricultural and Mechanical University**

MPH, Health Policy and Management, 2005 - 2007

Activities: President - Future Public Health Professionals

#### **Florida Agricultural and Mechanical University**

B.S., Biology, 2001 - 2005

Activities: Captain - FAMU Cross Country, Co-Captain - FAMU Track, Deputy Surgeon General – Student Government Association

---

# Brianna J. Saunders, MPA

1045 W. 73<sup>rd</sup> St. Indianapolis, IN 46260

[briannajsaunders@gmail.com](mailto:briannajsaunders@gmail.com) – 317.507.8025

## Education

Indiana Wesleyan University

Masters, Public Affairs - Specialization in Human Resources

Bachelors, Business Management

## Experience

**Associate Director, Community Engagement** ▪ 2015 to Current

*Alzheimer's Association* ▪ 50 E. 91<sup>st</sup> St. Indianapolis, IN 46240

- Managed the planning, promotion and delivery of Association standardized education programs.
- Engaged, trained and managed relationships with Chapter and community based volunteers to market, promote and deliver programs and services.
- Implemented best practices for leadership development, increased participation and program growth; drive and encouraged creativity and innovation at the community level.
- Developed and maintained a strong team and provided oversight of recruitment, training, coaching and supervision of Chapter program specialists.
- Responsible for on-going program evaluation and achieving measurable outcomes.
- Represented the Association at public events, conferences, workshops and media.
- Developed and maintained strategic partnerships and relationships with organizations in the aging and health care fields.
- Assisted in the development, implementation and evaluation of new services, programs and training in designated areas.
- Assured compliance with all Association policies, procedures, standards and applicable regulatory requirements; promoted Association-wide programs and initiatives.

**Community Manager, Relay For Life** ▪ 2013 to 2015

*American Cancer Society (ACS)* ▪ 5635 W. 96th St. Indianapolis, IN 46278

- Managed 6 communities and their Relay For Life event in the Central Indiana area including corporate, collegiate and community with a portfolio of income of \$330,000.
- Implemented best practices for leadership development, increased participation and event revenue growth; drove and encouraged creativity and innovation in the community.
- Engaged, trained and managed relationships with community volunteers to ensure successful events execution, with a focus on event volunteer leadership positions.
- Engaged the community in Relay For Life to drive increased event participation – event committee, teams, team members, sponsors and survivor/caregiver – including youth engagement teams in community events, Relay Recess and Field Day, high school Coaches vs. Cancer.
- Collaborated with corporate & distinguished partners and health systems staff to maximize event success; leverages opportunities to engage constituents from corporate, distinguished partners and health systems activities in events through event sponsorship and participation.
- Worked in partnership with health systems staff for achievement of identified event-related mission goals, including enterprise-wide initiatives. Integrated mission/cancer control activities messaging and within Relay For Life events.
- Facilitated volunteer retention and ensured meaningful volunteer recognition.
- Ensured compliance with ACS policies, including employment, risk management, event and cash handling, and financial controls.
- Worked in partnership with ACS CAN, including efforts to increase ACS CAN membership.

**Executive Assistant** ▪ 2011 – 2013

*American Cancer Society* ▪ 5635 W. 96th St. Indianapolis, IN 46278

- Supported State of Indiana Vice President regarding daily duties, calendar and was the primary point of contact for the position. Scheduled all executive travel and leadership meetings as well as coordinated meeting topics and presentations. Maintained travel, expenses and management of corporate accounts.
- Managed all daily office functions such as: ensure office accounts are in good standing, coordinate

# Brianna J. Saunders, MPA

1045 W. 73<sup>rd</sup> St. Indianapolis, IN 46260

[briannajsaunders@gmail.com](mailto:briannajsaunders@gmail.com) – 317.507.8025

vendors and equipment maintenance, liaison to corporate IT department to troubleshoot office technology issues, maintained office security systems, conducted orientation and technology training for new staff hires and supervised office volunteers.

- Managed all financial income processes and deposits. Coordinated and reviewed monthly income projections for Region One consisting of all offices in the state of Indiana. Managed and maintained Central Indiana's budget while monitoring budget for the remaining five offices.
- Coordinated state of Indiana joint staff office meetings and served as primary contact for each Indiana office and headquarters regarding resources for Region One.
- Supported Distinguished Events. Coordinated all committee meetings as well as obtained in-kind donations and corporate sponsorships for events. Served as on-site event manager and primary point of contact during events.
- Managed one of seven sites for Cancer Prevention Study 3 and obtained 110 participants.
- Coordinated and managed all Active For Life events in Central Indiana, which is American Cancer Society's health and wellness program. Motivated and encouraged staff to participate as well as educated staff on the mission.
- Organized annual volunteer summit and logistics.
- Supervised a support staff of three. Primary lead for all state of Indiana support staff. Responsible for maintaining consistent communication amongst state of Indiana offices as well as developed effective and efficient processes.
- Planned and organized in office events for internal and external constituents including staff appreciation and blood drives.
- Served as a resource and contact for Region 1 support staff, created a team environment, provided consistent and efficient process for all offices compiled a resource manual. Trained and educated support staff on processes, policies and best practices.

## **Administrative Assistant • 2008 – 2011**

*NCAA • PO Box 6222 Indianapolis, IN. 46206*

- Supported three administrators in the Academic and Membership Affairs Department by coordinating their daily administrative duties such as document development and organization and calendar management. Prepared and posted meeting agenda and materials, planned and coordinated meeting logistics, meals and travel for NCAA staff and committee members.
- Developed and implemented a new rules interpretation customer service phone scheduling process. Coordinated all rules interpretation customer service phone schedules for NCAA rules interpretations staff. Educated current staff and oriented new employees on the scheduling process.
- Served as the primary administrative lead for the progress-towards-degree team (specialists regarding student-athlete progress towards graduation). Assigned academic waiver requests to team members, coordinated team meetings and training sessions, and served as the initial contact for NCAA member institutions' customer service questions.
- Member of the mentoring team which mentored new hires and maintained a close mentor/mentee relationship for individuals during his/her first year as a staff member. Trained and oriented new hires on all aspects of the position, the department and the office. Worked closely with a team of five to create training manuals and new training methods for new staff.
- Member of the technology team, specifically focused on Compliance Assistant Internet (CAI) which is software developed to assist NCAA member institutions with tracking academic and regulatory data of their student-athletes.
- Member of the department's event management team and coordinated events including the department and office Christmas party, department and office staff retreats and the Arthritis Walk.

# Brianna J. Saunders, MPA

1045 W. 73<sup>rd</sup> St. Indianapolis, IN 46260

[briannajsaunders@gmail.com](mailto:briannajsaunders@gmail.com) – 317.507.8025

## **Volunteer Experience**

- Volunteer at Rock Steady Boxing serving on board coordinating and managing events including the annual BBQ to raise money for the gym, programs and advocacy initiatives.
- Certified volunteer counselor for Crisis Pregnancy Center.
- Volunteer and campaign manager of United Way Campaign since 2001.
- Volunteer and support/organized events at E.91 Christian Church.
- Served on board to plan and organize the Arthritis Walk.
- Volunteer for Second Helpings and several other shelters; serving food and working with visitors.
- NCAA Youth Clinics volunteer; worked on committee to organize clinics as well as traveled to sites and executed program. Served as a facilitator planning and executing various exercise programs with youth.

## **Additional Professional Activities/Experience**

- Certificate in Business Communications and Microsoft Excel.
- Computer programs: Microsoft Office Suite, Lotus Notes, Outlook, AS400, Quickbooks, Adobe, Siebel, EMT, Concur, Lawson, Yammer, Convio and Event website management.



---

## CHARLES SCHLEGEL

---

8266 N. Washington Blvd.  
Indianapolis, IN 46240

**Email:** charlieschlegel@post.harvard.edu  
**Cell Phone:** (617) 834-9941

- Education:**
- Harvard University, Graduate School of Education**  
Doctor of Education; Administration and Social Policy May 2003  
Dissertation: *Bridging Difference: Interaction and Learning through Civic Work*
- Stanford University**  
Masters of Administration and Policy Analysis; School of Education June 1995
- University of Michigan**  
Bachelor of Arts in History; College of Literature, Science and Arts May 1992
- Work Experience:**
- Independent Consultant** (8/15 – Present)
- Lead *Mass Insight Education*'s strategic support for the *Transformation Zone* within Indpls. Public Schools. Coach district leaders, develop management tools and refine improvement initiatives.
  - Design assessment systems to improve the leadership pipeline for the *Minneapolis Public Schools*, matching the unique needs of different schools to distinguishing strengths of principal candidates.
  - Train superintendents and district leaders state-wide to assess and enhance teacher development and evaluation systems. Develop and lead modules on *inter-rater reliability* and *effective feedback*.
  - Develop and refine *Marian University*'s school leadership program. Assess current model and counsel Dean as to innovative revisions to its selection, curricula and overall training of aspiring school leaders.
- Adjunct Professor, Marian University** (7/10 – Present)
- Lead weekly seminars studying central issues of school leadership, including teacher selection and evaluation, curriculum assessment, school culture and data-based decision making.
  - Mentor program participants to assume leadership positions within schools across the area; engage mentees in a formal process to build upon goals for personal growth and school improvement.
- Executive Director, Community Charter Network** (3/12-1/16)
- Led a network of four Indianapolis charter schools, serving over 1,200 students, K through 12, 85% of whom qualify for free lunch; managed a \$12 million budget and 150 teachers and administrative staff.
  - Supervised and evaluated four principals and a central support team, responsible for managing all aspects of network; devised management systems to support school-based decision-making.
  - Oversaw the design, development and management of a new charter school, replicating AMA's successful model; developed a unique partnership with local parks and pre-kindergarten program.
  - Created \$500K scholarship fund for students of two closing charter schools for which CCN assumed responsibility in July 2012; settled all financial obligations and oversaw all student and staff transitions.
- Principal & CEO, Avondale Meadows Academy** (7/08 – 3/12)
- Led a K-5 Indpls. charter school (480 pupils; 85% low-income); improved from a school with the state's 5<sup>th</sup> worst test scores in '08 to one that is consistently "A-rated" on the state's accountability system.
  - Managed a \$5 million budget, a quarter of which we raised each year through grants and private donations. Increased by 300% the cash reserves in just three years.
  - Designed and implemented systems to support a 50-member faculty, including merit-based pay, embedded professional development, performance evaluation and teacher leadership.
  - Built 20+ community partnerships, bringing critical support to students and families; developed a *Parent University*, a family engagement initiative focused on home practices that support students' success.
- Principal, Wayland Middle School** (7/04 – 6/08)
- Led Massachusetts middle school (730 students, grades 6-8) that consistently placed among the top 10 in the state, based on common measures of student achievement.
  - Managed a \$7 million budget. Supervised, evaluated and promoted the professional growth of over 70 teachers and 105 staff members, a third of whom were hired under my tenure.
  - Addressed and improved the district's attention to diversity; tripled the number of faculty of color; led a district-wide team, working to improve the performance of Black and Latino students.
  - Excelled in communications with parents through the publication of a highly-regarded monthly newsletter and organizing well-attended community events.

**Director of Research and Evaluation, Citizen Schools** (6/98 – 5/04)

- Developed and implemented evaluation and assessment systems for a growing, nation-wide network of after-school programs; built internal systems to use data to inform program resource allocation.
- Oversaw the design and implementation of rigorous external evaluation. Assessed impact upon students' academic and social development.
- Managed, supervised and evaluated five site directors, responsible for enrollment, program quality and overall success of programs serving 500 students at different Boston middle schools.

**Evaluation Consultant, New Leaders for New Schools** (9/03 – 5/04)

- Initiated and implemented a plan for the selection of an external evaluator to assess the quality and impact of organization's principal training program.
- Constructed and piloted internal measures to assess the quality of school leaders and provide data-based feedback on the strength of the organization's selection, training and support models for new principals.

**Instructor, Harvard University/Boston Public Schools** (9/02 – 5/03)

- Designed workshops in effective ways to use assessment data to improve classroom instruction; developed processes through which school team analyze and identify critical instructional challenges.
- Contributed to research that led to the publication of Data-Wise: A Step-by-Step Guide to Using Assessment Results to Improve Teaching and Learning. (Boudett, City & Murnane, 2005).

**Classroom Teacher, New Orleans Public Schools** (8/95- 6/97; 8/92- 6/94)

- Organized and directed learning activities for four self-contained classes – the final two of which were top performing in school. Managed administration and analysis of standardized test data.
- Initiated a school-wide science fair and led a committee responsible for curricula as well as a steering committee overseeing all school affairs.
- Chosen by colleagues as school's 1996 Teacher of the Year.

**School Director, Teach For America** (5/96- 7/96)

- Directed a six-week summer program designed to both educate 250 students and develop skills of 35 teacher candidates and evaluated candidates' instructional skills and readiness for assignments.
- Served on a leadership team responsible for the overall structure and operations of a *Teach for America* Summer Institute, preparing 550 members' teaching placements.
- Developed and co-instructed several seminars and two college courses as an adjunct professor at Cal State - Dominguez Hills.

**Project Assistant, Council of Chief State School Officers** (6/95- 8/95)

- Coordinated a committee developing English/Language Arts teaching standards for teacher licensure.
- Reviewed and compiled research on effective teaching practices in science and elementary reading.
- Produced a report detailing state-level issues in establishing performance standards for teachers.

**Service  
Experience:****Secretary and Board Member, Arts For Learning** (3/10 – Present)

- Oversee the direction, management and finances of this nonprofit; serve on Program Committee, developing effective ways to impact student achievement through arts programming.

**Mentor and Reading Tutor** (1/16- Present)

- Provide individualized reading instruction and support to third-graders at a local public school.
- Support and mentor local high school student in the preparation, application and transition to college.

**Mentor, Big Brothers of Massachusetts** (3/98- 6/08)

- Mentored a student, working on a weekly basis with family and teachers to support and encourage school engagement, social maturity and healthy development through adolescence.

**Citizen Teacher, Citizen Schools Program** (9/98- 8/02)

- Designed and led a total of seven 10-week classes, working with 8-10 youth on projects such as a radio documentary, a report on citizens' views of local schools and clinic in bike repair.

**Additional****Information:** References available upon request

# CLIFTON L. SNORTEN

CLSNORTEN@GMAIL.COM 317.840.8462

---

## PROFESSIONAL EXPERIENCE

---

- Scheduler/Office Manager | Office of Congressman André Carson July 2015 – Present
  - Project Director | Children's Defense Fund Freedom Schools® Program October 2014 – Present
  - Staff Assistant | Office of Congressman André Carson January 2014 – July 2015
  - Assistant Director | Multicultural Center, Ball State University October 2011 – December 2013
  - Residence Life Coordinator | Ross Hall, Butler University July 2010 – June 2011
  - Senior Camp Counselor | St. John's Missionary Baptist Church Omni Day Camp Summer 2007 – Summer 2011
  - Assistant Residence Hall Director | Painter/Whitcraft Halls, Ball State University July 2008 – May 2010
  - Practicum Student | Office of Student Affairs, Ivy Tech Community College East Central January 2010 – May 2010
- 

## FUNCTIONAL COMPETENCIES

---

### ADMINISTRATION AND STAFF SUPERVISION

- Represented the Congressman within district answering casework correspondence, meeting with constituents, verbal communications with constituents, and serving as a liaison with federal, district, and local agencies
  - Executed all logistics for summer program operation: program execution, coordination of transportation, and implementing educational initiatives
  - Selected, trained, supervised, and evaluated 10 EXCEL mentors, 9 Resident Assistants, 7 Desk Staff, 7 Night Staff members, 5 Servant Leader Interns and 1 Site Coordinator
  - Managed Congressional Internship Program
  - Met with BSU students to discuss Academic Deficiencies and the results of their MapWorks Survey
  - Facilitated check-in and check-out process and maintain online occupancy tracker for summer conferences at BSU
- Coordinated occupancy management, including: room assignments, room changes, key control, and the consolidation process
- 

## EDUCATION

---

**Master of Arts, Executive Development for Public Service** | Ball State University – Expected May 2017

**Master of Arts, Student Affairs Administration in Higher Education** | Ball State University – May 2010

- Creative Project: An Association for the Collegiate Gospel Choirs in the State of Indiana

**Bachelor of Science with Distinction, English Education** | Indiana University – May 2008

---

## AFFILIATIONS AND MEMBERSHIPS

---

- President | National Black Graduate Student Association June 2016 – Present
  - Advisory Board Member | Bloom Project Inc. May 2015 – Present
  - Youth Works Chair | NAACP, Greater Indianapolis Branch January 2015 – Present
  - President | Neal Marshall Alumni Club, Indianapolis Chapter July 2015 – June 2016
  - Business Administrator | Made 2 Worship Choir January 2009 – December 2014
  - Secretary | National Black Graduate Student Association June 2013 – May 2014
  - Executive Director | Association of Indiana College Gospel Choirs April 2010 – June 2014
- 

## PRESENTATION EXPERIENCE

---

- *Keynote Speaker* – Annual Awards Day, Central Nine Career Center May 2015
- *Luncheon Speaker* – School & Counselor Recognition Luncheon, ASVAB Career Exploration Program April 2015
- *Creating Multicultural Awareness in your Greek Community* – Pan-Hellenic Recruitment Counselor Retreat, BSU August 2013
- *Supporting Diverse Student Populations* – Cardinal Training, Ball State University July 2013
- *Assessing Student Engagement* – Spotlight on Research, Ball State University April 2013
- *Is This Really the Most Important Election of My Life* – Perspectives Discussion, Ball State University October 2012
- *Dealing with Conflict in Your Organization* – Multicultural Leadership Prep Series, Ball State University March 2012
- *Recruiting and Retaining Members* – Multicultural Leadership Prep Series, Ball State University February 2012
- *Opening Keynote Address* – Association of Indiana College Gospel Choirs Conference April 2011
- *Sexual Assault & Rape Awareness and Prevention* – Student Assembly, Hamilton Southeastern High School March 2011
- *Keeping it REAL: Having Difficult Conversations* – Winter Training, Butler University January 2011
- *Top Ten Residence Life Policies and Procedures* – Student Staff Training, Butler University August 2010
- *Student Spirituality* – Mid-Year Student Staff Orientation, Ball State University January 2010
- *Roundtable Discussion on Professional Boundaries* – Mid-Year Student Staff Orientation, Ball State University January 2010

# CLIFTON L. SNORTEN

CLSNORTEN@GMAIL.COM 317.840.8462

---

- *The Art and Power of Being a Lady...or a Gentleman* – Conference for Indiana Student Staff October 2009
- *Using Technology Wisely* – Student Staff Orientation, Ball State University August 2009

## LEADERSHIP DEVELOPMENT AND PROGRAM IMPLEMENTATION

- Coordinated a three-day summer institute, EXCEL, designed to prepare minority students for their freshman year
- Served as Deputy Director for National Conference and coordinated on on-site activities and programs
- Planned and organized cultural series program which includes cultural entertainment and educational programs
- Provided overall vision for the implementation of programming for a standalone residence hall of 500+ first year students and previously for a residence hall of 500+ upperclassmen students within a complex of 900+
- Developed a 2-day conference for collegiate gospel choirs in the state of Indiana
  - Managed all aspects of conference, including: programming, logistics, and meals
- Assisted in the implementation of the Housing & Residence Life's Student Staff selection process
  - Coordinated Student Staff Member Information Night
- Advised various student organizations, including: Hall Government, Voice of Triumph Gospel Choir, IMPACT Movement, Today's Black Women, Outlet Hip Hop Dance Troupe, and the National Association for the Advancement of Colored People
- Coordinated on-site and off-site activities for Summer Camp
- Recruited students and chapters to become involved in the National Black Graduate Student Association
- Participated in the planning of a congratulatory ceremony for graduating minority students
- Created materials for the formation of a student-led Opening Committee and coordinated selection process for leaders
- Coordinated facilities, rooms reservations, and implementation of new schedule format for 10-day Student Staff Training sessions

## BUDGET MANAGEMENT

- Maintained office accounts and payroll accounts in accordance with the regulations of Committee on House Administration governing the Member's Representational Allowance
- Consistently balanced petty cash box of \$1,200
- Completed bi-weekly payroll process for student staff employees
- Updated and track billing for the summer conferences
- Created budget and oversaw implementation of fundraising for a collegiate gospel choir conference

## INSTRUCTION AND FACILITATION

- Taught EDHI: 102: Introduction to Students as Leaders
- Taught EDHI 302b: Foundations of Leadership
- Taught EDHI 402b: Global Leadership
- Co-Taught EDHI 200: Introduction to Personnel Services
- Co-Taught EDHI 690: Assessing Student Engagement

## COMMUNICATION SKILLS

- Represented the Multicultural Center at Preview Days, Summer Orientation, and other Admission functions
- Served as chief spokesperson the National Black Graduate Student Association
- Managed all booking, public relations, and coordination of communication for a city-wide gospel choir
- Established quarterly newsletter for gospel choir and served as editor in chief
- Created dialogue for marketing video to attract new resident to University Apartments
- Served as social media coordinator for multiple organizations
- Gained skills in substance abuse counseling by working with a Counseling Center Staff Psychologist

## CRISIS MANAGEMENT AND STUDENT DISCIPLINE

- Enforced behavioral expectations for students regarding residential life, institutional policy, state, and federal law
- Facilitated judicial hearings and administer sanctions for students regarding Housing and Residence Life policies and regulations
- Executed on call duty coverage, crisis management, conflict mediation, and policy enforcement for students
- Trained as a University panel member for student grade appeals
- Facilitated Alcohol Education small group sessions
- Served on University's peer review panel and adjudicated judicial hearing as a designee of the Dean of Students

# Keeanna Warren

11513 Scheel Lane • Carmel, Indiana, 46032 • (317)605-8092 • keeannawarren@gmail.com

---

## SUMMARY OF PROFESSIONAL SKILLS

---

- Curriculum Development
- Instructional Coaching
- Data Driven Instruction
- Professional Development
- Recruitment and Hiring
- Departmental Supervision
- Strategic Planning
- Community Engagement
- Proficiency in ASL

## EDUCATION AND LICENSURE

---

### Indiana State University

*Doctor of Philosophy (Ph.D.)*

*Educational Administration: School Administration Ph.D.*

Terre Haute, IN

May 2017

### Marian University

*K-12 Building Level Administrator's License, Teaching and Learning Leadership*

*Master of Art in Teaching*

Indianapolis, IN

December 2013

May 2012

### Purdue University

*Bachelors of Art in Sociology with a Minor in Psychology*

West Lafayette, IN

May 2010

### Indiana Department of Education

*Professional Educator License*

- Economics, 5-12
- Elementary Education, K-6
- English as New Language, K-6
- Mathematics, 5-12
- Historical Perspectives, 5-12
- Government and Citizenship, 5-12
- Language Arts, 5-12
- Building Level Administrator, P-12

## PROFESSIONAL EDUCATIONAL EXPERIENCE

---

### The Excel Center-Meadows

*Director*

Indianapolis, IN

February 2015- Present

- During the 2015-2016 school year increased the number of graduates by 33%
- During the 2015-2016 school year rated an "A" school by the Indiana Department of Education
- Set educational standards and goals, and help establish policies and procedures to carry them out
- Supervise and manage faculty and staff of 25
- Create and maintain a safe and secure educational environment for approximately 370 students
- Manage the fiscal activities of the school
- Observe teaching methods and examine learning materials to evaluate and standardize curricula and teaching techniques, and to determine areas where improvement is needed.
- Recruit, hire, train, and evaluate primary and supplemental staff.
- Create opportunities to engage families and community partners in school mission and vision

### The Excel Center-Meadows

*Lead Instructor*

Indianapolis, IN

July 2013 – February 2015

- Observed teaching methods and examined learning materials to evaluate and standardize curricula and teaching techniques, and determined areas where improvement is needed
- Collaborated with teachers to develop and maintain curriculum standards, data trends, and set performance goals and objectives
- Influenced recruiting, hiring, training, and evaluating of primary and supplemental staff
- Planned and lead professional development activities for teachers, administrators, and support staff

### The Excel Center-Meadows

Indianapolis, IN

# Keeanna Warren

11513 Scheel Lane • Carmel, Indiana, 46032 • (317)605-8092 • keeannawarren@gmail.com

---

## *College Transition Counselor / Graduate Counselor*

July 2013- August 2014

- Advised students on issues such as course selection, progress towards post-secondary plans, and career decisions
- Increased the number of college credits earned by over 800%
- Developed and implemented new college and career procedures; as well as created programs, and workshops that promote college and career readiness
- Formed and maintained new community partnerships to support a college readiness school culture
- Increased the graduation rate by over 40%
- Counseled and provided guidance to students regarding personal, academic, or behavioral issues
- Maintained accurate and completed student records, created academic plans and connected students with outside resources

## **The Excel Center-Meadows**

Indianapolis, IN

### *Night Instructor*

July 2013 – April 2014

- Substantially increased the number of night students earning credits
- Achieved 83% Math ECA pass rate
- Recruited, trained and managed night tutoring staff
- Planned class schedule that allows students to move through course sequence in order to deliberately increase graduation rates

## **Washington Township Schools –Nora Elementary**

Indianapolis, IN

### *5<sup>th</sup> Grade Teacher*

October 2012- July 2013

- Modified the general education curriculum for special-needs students
- Evaluated data in order to predict outcomes and modify instruction
- Worked with diverse student body, including teaching a class with 16 English Language Learners and 6 Special Education students
- Accomplished a 92% pass rate for ISTEP + Math

## **National Heritage Academies - Andrew J. Brown Academy**

Indianapolis, IN

### *5<sup>th</sup> Grade/Middle School Instructor*

July 2010- October 2012

- Planned, developed, and presented engaging and standard-based learning opportunities for students
- Administered and analyzed data to gauge student learning and drive instruction
- Achieved over a 92% student pass rate on ISTEP+ Math for two consecutive years
- Ensured that at least 83% of students obtained their NWEA growth goal in Math, Reading, and Language

## **PHILANTHROPIC EXPERIENCE**

---

### **L.E.A.D. Tutoring Program**

Indianapolis, IN

#### *Program Developer*

August 2011-October 2013

- Created and managed an after school tutoring program that provided students with tailored instruction three times a week
- Plan and delivered standard –based, data driven and engaging activities to raise student achievement
- Worked with students and parents to set and monitor progress towards weekly academic goals

### **Andrew J. Brown Academy**

Indianapolis, IN

#### *Boys Basketball Coach*

August 2011-April 2012

- Managed a team of 20 players grades 3-5
- Provided training direction, encouragement, motivation, and advice to prepare athletes for games
- Conducted and organized weekly practice to teach the fundamentals of basketball



**ALLEGIANT PREP**  
ACADEMY

# Attachment 2

Board Member Information Form

Exhibit C

**Charter School Board Member Information Form**

*(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 applicant 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:  
**Allegiant Preparatory Academy Charter School**
2. Your full name:  
**Alyssa/Paulette/Howard**
3. Brief educational and employment history (no narrative response is required if your resume is attached to the application as part of **Attachment 1**).  
 Resume is attached. **Please do not include a resume in both Attachment #1 and #2.**
4. Describe any previous experiences relevant to serving on the board of a charter school (including other board experience, or any experience overseeing start-up or entrepreneurial ventures). If you have not had previous board experience, explain why you believe that you will be an effective board member.

**#4 response attached below**

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 any 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 conducting, or plans to conduct, business with the charter school (whether as an individual or as a director, officer, employee or agent of another entity). If so, indicate and describe the precise nature of your relationship and the nature of the business.



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, 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  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.

Not applicable  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.


Not applicable  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. Describe 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

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 the above proposed charter school is true and correct in every respect.	
<b>Name and Title</b> Anissa Howard, PWC-Senior Associate	<b>Date</b> 3/20/17
<b>Signature</b> 	

**4. Describe any previous experiences relevant to serving on the board of a charter school (including other board experience, or any experience overseeing start-up or entrepreneurial ventures). If you have not had previous board experience, explain why you believe that you will be an effective board member.**

I am honored to serve on the Founding Board of Allegiant Prep Academy. It is my desire to have a positive impact on the Indianapolis community, and I believe that impact begins with our youth. I grew up in Indianapolis, and was fortunate to attend some of the best private schools Indianapolis has to offer including St. Richard's Episcopalian School and Cathedral High School. The professional opportunities, networks I have built over the years, and the career success I have achieved to date are a testament to my educational background. However, I know that not everyone is so fortunate as to receive a private school education. A quality education shouldn't be unattainable because of income, race, or neighborhood. Only 10% of adults over the age of 21 have bachelor degrees on the Westside. This shouldn't be the norm, and I'm joining the Allegiant Prep Academy founding board to ensure that a quality education, and a better-quality life, can be obtainable by all.

My education, work experience, and professional achievements position me to be a great addition on the Board of Directors for Allegiant Prep Academy. My strong background in finance and accounting will be an asset to Board oversight of the school budget and finances. Additionally, in my current position as a CPA at Pricewaterhouse Coopers, I review the financial statements for multi-billion-dollar public, SEC filing clients nationally. This position requires organizational skills, project management skills, and critical thinking. I will use the skills I have developed throughout my career to be an active and effective board member. In addition to my CPA, I hold a Bachelor's degree in Accounting from Howard University, magna cum laude.

In addition to my professional experience, I am an engaged member in the Indianapolis community through my current employer. One of Pricewaterhouse Coopers' volunteerism initiatives is around youth education. Throughout the year, I volunteer for various financial training sessions and seminars with Junior Achievement of Indianapolis, the Boys and Girls Club of Indianapolis, and the Center for Leadership Development. Working with youth has been a long-standing interest of mine and I am very enthusiastic about the opportunity to further contribute to my city of Indianapolis by serving as a board member for a school that will educate all students in grades K-8 with rigorous academics, character development, and a commitment to community necessary for college success and a life of positive action.

Although this will be my first opportunity to serve on a nonprofit board, I have been learning and working with the other Allegiant Prep founding board members over the past several months to understand the role of governance, the need for quality education options on the Westside where the school will be located, and what it takes to effectively operate a successful urban charter school. Our team also had a full day planning retreat with support from Building Excellent Schools, at which we reviewed and discussed all the major components of our school design. We have also discussed accountability for the school and the board's role in providing effective oversight to ensure that Allegiant Prep achieves the academic outcomes promised in our charter, makes wise use of public funds that support the school, operates in compliance with all regulatory requirements, and provides a safe space for children to learn.

Additionally, we have reviewed and discussed our school bylaws and conflict of interest policy, job descriptions for board committees, and read Charter School Board University to further ensure our ability to provide strong oversight and governance for Allegiant Prep.

Howard, Alyssa  
Board Member Information Question 4

Our founding team meets regularly, receives a weekly update from school founder, Rick Anderson, and completes weekly assignments to ensure our preparedness for the serious responsibility of overseeing a public charter school. Our board is composed of a diverse group of individuals with strong professional skill sets and a real belief in the power of education to transform lives. We stand ready to ensure that Allegiant Prep achieves its mission and helps youth succeed in life. Thank you for your consideration of our proposal.

Exhibit C

**Charter School Board Member Information Form**

*(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 applicant 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:
  
2. Your full name:
  
3. Brief educational and employment history (no narrative response is required if your resume is attached to the application as part of **Attachment 1**).  
 Resume is attached. **Please do not include a resume in both Attachment #1 and #2.**
  
4. Describe any previous experiences relevant to serving on the board of a charter school (including other board experience, or any experience overseeing start-up or entrepreneurial ventures). If you have not had previous board experience, explain why you believe that you will be an effective board member.
  
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 any 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 conducting, or plans to conduct, business with the charter school (whether as an individual or as a director, officer, employee or agent of another entity). If so, indicate and describe the precise nature of your relationship and the nature of the business.

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, 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  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.

Not applicable  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.

Not applicable  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. Describe 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

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 the above proposed charter school is true and correct in every respect.

Name and Title

Date

Signature

*Janice Howard*

Howard.Janice

Board Member Information Form Question 4

**4. Describe any previous experiences relevant to serving on the board of a charter school (including other board experience, or any experience overseeing start-up or entrepreneurial ventures). If you have not had previous board experience, explain why you believe that you will be an effective board member.**

I believe my professional skills and experience combined with my belief in the power of a quality education will enable me to serve as an effective board member for Allegiant Preparatory Academy, a school whose success I am committed to. I have over 20 years of experience in Human Resources including recruitment, employee relations, benefits administration, compensation, performance management, training, and the technical side of HR encompassing database management. I hold a BS in Business Information Systems, as well as a MBA with a specialization in Human Resources from Indiana Wesleyan University.

My employment with organizations in both the for profit and nonprofit sectors, varied volunteer experiences, current board training, and ongoing support from Building Excellent Schools affords me with a strong ability to perform well as a board member and assist in ensuring the success of Allegiant Prep Academy.

I am currently employed by Angie's List as a Senior Business Analyst. Angie's List is a local employer with over 1,600 employees. In this position, I am responsible for supporting the HR and Payroll departments in all initiatives. Since starting with the company in 2015, some of the projects I have managed include assisting with upgrades to the Human Capital Management system, troubleshooting and providing remediation for poorly configured system modules, launching of the new career site, implementing benefits and performance management, and providing a timely solution to meet government initiated requirements for the Affordable Care Act.

Through my employment, I have also participated in several community-focused activities sponsored by Angie's List. Two examples are: Indy Do Day and the Lunch Buddies program. Indy Do Day entailed assisting the Indianapolis – Marion County Public Library in providing each student with a library card by preparing mailings for Indianapolis area schools. But, the most fulfilling volunteer effort for me has been the Lunch Buddies program which allows me to spend lunch one day a week at IPS School #14. There I spend an hour with a 1<sup>st</sup> grade student speaking with and engaging him to provide a positive influence. We discuss his struggles, school work, his goals, and how he can be and do well. This experience in particular really made me want to provide more support for education and when I met Rick Anderson, proposed school leader, and he shared his vision for the school with me, I knew I wanted to be involved in bringing a great school for children in grades K to 8 to Indy's Westside.

Although this is my first opportunity serving on a board, I believe my life experiences and strong desire to serve my community has provided me with the skills needed to assume this responsibility. As a board we meet regularly to go over initiatives, our roles, what effective governance looks like, and the Indiana Charter School Board process for authorization. We held a full day retreat watching videos of high performing urban charter schools; going over budgets; and reviewing the academic design, school culture and operations, enrollment, and facility selection. We strongly believe in the mission, vision, and core principles of Allegiant Prep Academy, and in the skill, passion, and drive of our proposed school leader, Rick Anderson. His excitement and strong desire to provide all children with a quality education is contagious, and energizes us to ensure the goals for Allegiant Prep Academy come to fruition.

Howard.Janice

Board Member Information Form Question 4

I also have great confidence in our founding team. We have very carefully and strategically recruited a diverse group of individuals with skills in education, finance, law, strategy, HR, marketing, technology, and facilities to ensure that we have board members who can help problem solve around any and all challenges the school might face. Our group has also really come together as a team. We meet regularly, receive weekly email updates from Mr. Anderson, complete weekly reading and study assignments, and are working hard to master all components of our school application so that we are well prepared to ensure the school achieves its accountability goals. We know that we are taking on a big responsibility and we are ready to serve the school with loyalty and fidelity, upholding the school's mission and commitment to the students, family, and community we serve.

I was afforded a quality education by my parents. Unfortunately, they felt there were no viable options in my neighborhood. After repeated requests, my mother relented, and in 5<sup>th</sup> grade allowed me to attend the neighborhood school. I immediately saw how different education and doing well in school was perceived in my current school in comparison to the schools I had been attending. After the end of the school year, I was sent back to my previous school and I truly believe my educational foundation is a very large part of my current success. Every child deserves this right. Every child deserves a quality education. Thank you for consideration of our application.

Exhibit C

**Charter School Board Member Information Form**

*(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 applicant 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:  
**Allegiant Preparatory Academy Charter School**
2. Your full name:  
**Anthony C. Pearson**
3. Brief educational and employment history (no narrative response is required if your resume is attached to the application as part of **Attachment 1**).  
 Resume is attached. **Please do not include a resume in both Attachment #1 and #2.**
4. Describe any previous experiences relevant to serving on the board of a charter school (including other board experience, or any experience overseeing start-up or entrepreneurial ventures). If you have not had previous board experience, explain why you believe that you will be an effective board member.

#4 response attached below

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 any 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 conducting, or plans to conduct, business with the charter school (whether as an individual or as a director, officer, employee or agent of another entity). If so, indicate and describe the precise nature of your relationship and the nature of the business.



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, 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  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.

Not applicable  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.

Not applicable  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. Describe 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

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 the above proposed charter school is true and correct in every respect.

Name and Title

Tony Pearson, Associate General Counsel - IU Health

Signature



Date

3/20/17

**4. Describe any previous experiences relevant to serving on the board of a charter school (including other board experience, or any experience overseeing start-up or entrepreneurial ventures). If you have not had previous board experience, explain why you believe that you will be an effective board member.**

I am honored to serve on the Founding Board of Allegiant Preparatory Academy. I believe that high quality educational experiences should be available to all Indianapolis families. I am a resident of Indianapolis and my wife and I have three children. We have worked hard to provide the best possible learning environment for them, but understand that many families do not have access to quality educational opportunities for their own children. I am committed to helping to change this reality through my work with Allegiant Prep.

My education, and my professional and personal experience will allow me to be a valuable contributor to the Allegiant Prep Board of Directors. I bring professional experience in several different areas including a solid transactional and regulatory law background and experience in providing health care and support services to low-income patient populations. I also have experience with corporate governance and extensive external relations experience. I hold a JD with a concentration in Health Law from the Indiana University Robert H. McKinney School of Law, as well as a Master's in Public Health with a concentration in Health Policy and Management from Florida Agricultural and Mechanical University. I currently serve as an Associate General Counsel for Indiana University Health, primarily serving our physician practice group, where I support over 30 departments and divisions. In this capacity, I am frequently called upon to evaluate risk, ensure standard processes and procedures are followed, and provide counsel on regulatory implications to business operations. As a board member for Allegiant Prep, this experience will enable me to contribute to the board in many areas, but most particularly, to ensure that the school operates in compliance with all state, local, and federal laws and regulations pertaining to public charter schools and nonprofit organizations.

Our board has been preparing for anticipated authorization of the school. We have been meeting since December and have received training and resources via Building Excellent Schools, a nationally recognized organization with proven success in training leadership for new charter schools. I am also very impressed with Rick Anderson, our proposed school leader. Mr. Anderson is an experienced educator, an Indianapolis native, and a leader who possesses an incredible drive to help children prepare for the academic rigor of college through a focus on math, literacy, and character development. Mr. Anderson exemplifies the can do attitude that will enable Allegiant Prep to achieve the academic outcomes we have promised in our charter application.

My wife and I are both children of educators who filled us with a love for learning and set us on a path to discover how to leverage our education to care for ourselves and contribute to our community. As a founding board member, it is my desire to bring the option of a solid educational foundation to the students in grades K to 8 that will be served by Allegiant Prep on the Westside. I will do all that I can to ensure Allegiant Prep upholds the tenants of its Charter and remains true to its mission to educate its students with rigorous academics, character development, and a commitment to community necessary for college success and a life of positive action.

Exhibit C

**Charter School Board Member Information Form**

*(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 applicant 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:  
**Allegiant Preparatory Academy Charter School**
2. Your full name:  
**Brianna Jo Saunders**
3. Brief educational and employment history (no narrative response is required if your resume is attached to the application as part of Attachment 1).  
 Resume is attached. Please do not include a resume in both Attachment #1 and #2.
4. Describe any previous experiences relevant to serving on the board of a charter school (including other board experience, or any experience overseeing start-up or entrepreneurial ventures). If you have not had previous board experience, explain why you believe that you will be an effective board member.

**#4 response attached below**

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 any 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 conducting, or plans to conduct, business with the charter school (whether as an individual or as a director, officer, employee or agent of another entity). If so, indicate and describe the precise nature of your relationship and the nature of the business.

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, 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  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.

Not applicable  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.

Not applicable  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. Describe 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

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 the above proposed charter school is true and correct in every respect.

**Name and Title**

Brianna Saunders, Community Relations Manager at IPL

**Signature**

*Brianna Saunders*

**Date**

3/24/17

**4. Describe any previous experiences relevant to serving on the board of a charter school (including other board experience, or any experience overseeing start-up or entrepreneurial ventures). If you have not had previous board experience, explain why you believe that you will be an effective board member.**

I am honored to serve on the Founding Board of Allegiant Preparatory Academy Charter School. I not only believe that quality education is the most important tool for success in life; I am living proof of it. I grew up in a community very similar to the one that Allegiant Preparatory proposes to serve on the Westside and had limited access to a quality education. However, I was determined to take on my future and to make good choices in life that would ensure a positive path for myself and my family. I was determined to find a way to get to college after earning a GED, which, against the odds, I was able to do.

Today, my family is fortunate enough to have the option of choosing where we would like to live and the type of schools our children can attend. I am, and have always been a proud resident of Marion County, where my husband and I plan on raising our two young children until they go to college. However, not everyone has access to a quality education and that is why I want to actively give back to my community to ensure that others have a real path to college and career success.

I believe that my education, work experience, and professional achievements position me to be an active and effective member of the Allegiant Preparatory Board. I bring a strong background in nonprofit management, public affairs, and community engagement. I hold a B.S. in Business Management and a Master's in Public Affairs, both from Indiana Wesleyan University. Currently, I serve as the Community Relations Manager for Indianapolis Power and Light (IPL). IPL is dedicated to making a difference in the communities we serve by donating more than \$2 million annually in corporate and employee donations serving on more than 200 nonprofit boards, and by giving over 24,000 hours in volunteer support for a variety of community organizations. Previously, I was an executive assistant for the American Cancer Society where I coordinated daily office functions, managed financial income processes, and coordinated fundraising events. I also teach undergraduate classes in Human Resources Management at Indiana Wesleyan University. In addition to my professional experience, I am an engaged member of the Indianapolis community and firmly believe in the power of giving back to others. I have been an active volunteer and supporter for Rock Steady Boxing, the United Way, the American Cancer Society, and the Alzheimer's Association. I also spend time supporting public safety, providing services for the homeless, and serving on boards at Mt. Pleasant Baptist Church.

Along with our founding team, I have been working very hard since December to master all we need to know to be a cohesive and strong governing board for Allegiant Preparatory. Our founding team has regularly scheduled board meetings and training sessions and we receive weekly communications from the proposed Head of School, Rick Anderson about the progress of our charter application. We also held an all-day retreat where we learned more about the school design and also utilized board training resources and support from Building Excellent Schools, a national organization with a proven track record of success for training charter school leaders and their boards of directors. We have worked very hard to prepare to serve the school well and to strengthen our knowledge of the differences between management and governance so that we are providing effective oversight for the school and supporting the school leader in appropriate ways, while not becoming involved in day-to-day school operations, as this is the purview of the school leader. As a group we are all very well versed on our school's mission, vision, and values, focus on math and literacy, and driven towards sustainable success of the school and its students.

I have also joined Mr. Anderson and other board members in meetings with key constituents in the community to discuss Allegiant Preparatory and its mission and vision. We are creating opportunities to introduce ourselves to the community prior to being approved in order to gain an understanding of the needs in the area, and to grow community interest in and support for the school. I intend to fully utilize my expertise and experience to ensure Allegiant Preparatory is well-known, respected and sustainable to ensure that other children have an opportunity to overcome challenging life circumstances, just as I did.

Exhibit C

**Charter School Board Member Information Form**

*(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 applicant 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:  
Allegiant Preparatory Academy Charter School
2. Your full name:  
Charles Schlegel, Ed.D.
3. Brief educational and employment history (no narrative response is required if your resume is attached to the application as part of **Attachment 1**).  
 Resume is attached. **Please do not include a resume in both Attachment #1 and #2.**
4. Describe any previous experiences relevant to serving on the board of a charter school (including other board experience, or any experience overseeing start-up or entrepreneurial ventures). If you have not had previous board experience, explain why you believe that you will be an effective board member.

#4 response attached below

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 any 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 conducting, or plans to conduct, business with the charter school (whether as an individual or as a director, officer, employee or agent of another entity). If so, indicate and describe the precise nature of your relationship and the nature of the business.

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, 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  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.

Not applicable  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.

Not applicable  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. Describe 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

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 the above proposed charter school is true and correct in every respect.

Name and Title

Charles Schlegel, Education Consultant

Signature



Date

Mar. 17, 2017

Schlegel.Charles  
Board Member Information Form Question 4

I have spent almost my entire career in education and am most enthusiastic about serving as a board member for Allegiant Preparatory Academy. Currently, I am an educational consultant working on several projects including the restructuring of Marian University's school leadership program. Prior to my current role, I served as the Superintendent of the *Community Charter Network* (CCN), a small, group of public charter schools in Indianapolis. CCN schools, started in July 2012, serve nearly 1,200 students in grades K-12. Prior to leading CCN, I served as Principal and CEO of the *Avondale Meadows Academy*, a K-5 charter school in an especially challenged part of Indianapolis. I also served as principal of *Wayland Middle School*, a traditional public school in a suburb of Boston, MA. My career in schools began in the Orleans Parish Public Schools, LA, where I served as an upper elementary school teacher for four years – the first two of which were through the *Teach For America* program. I was also an early leader in the development of *Citizen Schools*, a Boston-based after-school program focused on project-based learning and civic involvement.

I hold a Bachelor's degree from the University of Michigan, a Master's in Education from Stanford University, and a doctorate in education from the Harvard Graduate School of Education. My wife and I have three daughters, all enrolled in public schools near our home in Indianapolis.

With regard to previous board experience, I also serve on the governing board of Arts for Learning, a local non-profit, and on an Advisory Board for the Indianapolis Children's Museum. Although this will be my first time serving on a board of directors for a charter school, I have led several charter schools and, in each one, served as the school's principal and person most responsible for communication with and overall interaction with each school's Board. In serving each school's Board, I was exposed to nearly all aspects of a charter board's oversight and operations. I was especially fortunate to have served under the guidance of several experienced and highly qualified Board Chairs, who consistently modeled the essential respect for the differences in responsibility between a charter board and the school's management.

Our founding group has been meeting since the fall, working hard to bring Allegiant Prep to life. We meet regularly, complete weekly reading assignments, receive frequent communication from Rick Anderson, our proposed school leader, and are mastering both the knowledge and the skills necessary to ensure strong oversight for Allegiant. We are also benefitting from support and resources from Building Excellent Schools (BES), an organization with a mission to develop strong leadership for charter schools across the country. BES will continue to support both the board of directors, and the school leader over the course of the coming years to help ensure a strong school start and success for our students.

Having spent my entire career in education, I am most enthusiastic about the mission and vision of Allegiant Prep, I have great confidence in the ability of Mr. Anderson to lead the school, and I know that our board members stand ready to provide strong oversight for the school.



Exhibit C

**Charter School Board Member Information Form**

*(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 applicant 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:  
Allegiant Preparatory Academy Charter School
2. Your full name:  
Clifton L Snorten
3. Brief educational and employment history (no narrative response is required if your resume is attached to the application as part of **Attachment 1**).  
 Resume is attached. **Please do not include a resume in both Attachment #1 and #2.**
4. Describe any previous experiences relevant to serving on the board of a charter school (including other board experience, or any experience overseeing start-up or entrepreneurial ventures). If you have not had previous board experience, explain why you believe that you will be an effective board member.

#4 response attached below

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 any 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 conducting, or plans to conduct, business with the charter school (whether as an individual or as a director, officer, employee or agent of another entity). If so, indicate and describe the precise nature of your relationship and the nature of the business.

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, 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  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.

Not applicable  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.

Not applicable  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. Describe any potential ethical or legal conflicts of interests that would, or are likely to, exist should you serve on the school's board.

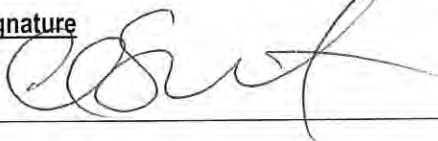
None  Yes

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 the above proposed charter school is true and correct in every respect.

**Name and Title**

Clifton Snorten, Office Manager, Rep. André Carson

**Signature**



**Date**

3/20/2017

**4. Describe any previous experiences relevant to serving on the board of a charter school (including other board experience, or any experience overseeing start-up or entrepreneurial ventures). If you have not had previous board experience, explain why you believe that you will be an effective board member.**

I am thrilled to serve on the founding board of Allegiant Preparatory Academy. As a lifelong Hoosier with a personal and professional commitment to educational equity, I am looking forward to the work ahead in expanding opportunities for high-quality education to the residents of the Westside of Indianapolis.

My education, work experience, and professional achievements position me to be an active and effective member of the Board of Directors for Allegiant Prep. I bring a strong background in governance and operational administration to the Board. I earned a B.S. in English Education from Indiana University and a M.A. in Student Affairs Administration in Higher Education from Ball State University. I am currently employed as Scheduler/Office Manager for Congressman André Carson within Indiana's 7<sup>th</sup> Congressional District. As a senior member of the Congressman's staff, I am responsible for maintaining the Congressman's official schedule; serving as a liaison for the Congressman with the staff, constituents, and press; and representing the Congressman at events within the district. Prior to my current role, I worked in the area of Higher Education and Student Affairs at Ball State University and Butler University.

In addition to my professional experience, I am an active member of the Indianapolis community. In 2015, I worked to establish the first Children's Defense Fund Freedom Schools<sup>®</sup> program within the state of Indiana. This six-week summer reading enrichment program is designed for children who might otherwise not have access to books. The *CDF Freedom Schools* program plays a much needed role in helping to curb summer learning loss and close achievement gaps – and is a key part of the Children's Defense Fund's work to ensure a level playing field for all children.

I also have extensive experience in non-profit governance. During graduate school, I created the Association for Indiana College Gospel Choirs, an organization designed to bridge the gap between the collegiate gospel choirs within the state. I led this organization as its inaugural Executive Director from 2009-2014. Last year, I was elected as the 24<sup>th</sup> President of the National Black Graduate Student Association (NBGSA). NBGSA is recognized as the nation's largest interdisciplinary and student-run organization dedicated to improving the status of Black students in higher education by systematically identifying and addressing their needs and concerns. NBGSA is governed by an executive board of graduate students and is operated by a professional staff at the national office located on the campus of Howard University in Washington, D.C. I have been a member of this organization since 2009, having previously served as social media coordinator, State Representative, Secretary, and Deputy Conference Director.

Since last fall, our founding team has been hard at work preparing to provide strong governance to Allegiant Prep. Our proposed Head of School, Rick Anderson, has provided us with extensive training so that we are aligned with Allegiant Prep's mission and vision and school design. We have also received training in the roles and responsibilities of the board of directors for public charter schools and we

Snorten.Clifton

Board Member Information Form Question 4

understand the accountability measures for the school. Through Building Excellent Schools, we have also received a number of resources that will enable us to closely monitor school outcomes including academic achievement, finances, and compliance with all of the laws and regulations pertaining to public schools and to nonprofit organizations in Indiana. Our goal is nothing short of bringing an outstanding school for children in grades K to 8 to the Westside of Indy. We are wholly committed to this mission and vision.

Exhibit C

**Charter School Board Member Information Form**

*(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 applicant 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:  
Allegiant Preparatory Academy Charter School
2. Your full name:  
Keeanna Jessica Marie Warren
3. Brief educational and employment history (no narrative response is required if your resume is attached to the application as part of Attachment 1).  
 Resume is attached. Please do not include a resume in both Attachment #1 and #2.
4. Describe any previous experiences relevant to serving on the board of a charter school (including other board experience, or any experience overseeing start-up or entrepreneurial ventures). If you have not had previous board experience, explain why you believe that you will be an effective board member.

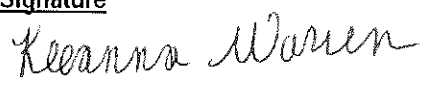
**#4 response attached below**

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 any 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 conducting, or plans to conduct, business with the charter school (whether as an individual or as a director, officer, employee or agent of another entity). If so, indicate and describe the precise nature of your relationship and the nature of the business.

- 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, 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     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.  
 Not applicable     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.  
 Not applicable     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. Describe 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

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 the above proposed charter school is true and correct in every respect.	
<u>Name and Title</u> Keeanna Warren, Director with the Excel Center	<u>Date</u> 03/23/2017
<u>Signature</u> 	

Warren.Keeanna

Board Member Information Form Question 4

**4. Describe any previous experiences relevant to serving on the board of a charter school (including other board experience, or any experience overseeing start-up or entrepreneurial ventures). If you have not had previous board experience, explain why you believe that you will be an effective board member.**

I am thrilled to be a member of the founding board for Allegiant Preparatory Charter School. I subscribe to the ideology that all student can learn and succeed when they are appropriately challenged and supported. It is my passion to ensure that all student in the Indianapolis area have access to a quality education and a pathway to college. Though this will be my first opportunity to serve on a school board, my education and work history have prepared me for this opportunity.

I hold a Master of Arts in Teaching from Marian University along with a P-12 Principal Endorsement. Through this program, I learned best practices in meeting the needs of the student in the classroom with a framework that focused on instruction, curriculum, and professional development. I am currently working on my Ph.D. in Educational Administration from Indiana State University. Through this program, I continue to learn how to best manage systems and people in a way that will lead to a quality and equitable education for all the students I have the privilege a work with.

I have held a school leadership position with The Excel Center since 2013. In my current role, I serve as the chief academic officer for my building and provide hands-on leadership in planning and executing the education goal and vision for my school. I am responsible for the supervision and management of staff along with the charge of creating and sustaining a safe and secure educational environment for my students. I've worked on committees that have both created and vetted new curriculum. In addition to my administrative experience, I have taught elementary, middle and high school. During this time I had the opportunity to significantly raise student achievement in classrooms in which many students are enrolled in Special Education and English Language Learner programs.

As a board member, I will contribute my experience in solving complex problems, tracking and analyzing data, managing a school budget, motivating a team, planning strategically, raising student achievement, and connecting with a diverse population. I am mission aligned and excited for the opportunity to ensure that every student at Allegiant Preparatory Academy has the opportunity to succeed.



**ALLEGIANT PREP**  
ACADEMY

# Attachment 3

Decision Making Authority



Exhibit D

**Decision-Making Authority**

<u>Function</u>	<u>Governing Board</u>	<u>School</u>
<u>Performance Goals</u>		
<u>Curriculum</u>		
<u>Professional Development</u>		
<u>Data Management and Interim Student Assessments</u>		
<u>Grade Level Promotion Criteria</u>		
<u>Culture</u>		
<u>Budgeting, Finance, and Accounting</u>		
<u>Student Recruitment</u>		
<u>School Staff Recruitment and Hiring</u>		
<u>HR Services (payroll, benefits, etc.)</u>		
<u>Development</u>		
<u>Community Relations</u>		
<u>Information Technology</u>		

<u>Function</u>	<u>Governing Board</u>	<u>School</u>
<u>Facilities Management</u>		
<u>Vendor Management / Procurement</u>		
<u>Other Operational Functions, if any</u>		



**ALLEGIANT PREP**  
ACADEMY

# Attachment 4

Course Scope and Sequence

#### Attachment 4: Course Scope and Sequence

Provide a core curriculum scope and sequence by subject, for each grade level proposed, that demonstrates clear alignment with Indiana’s Academic Standards.

---

#### Curricular Development Timeline

If authorized, the Head of School will work during the planning year (Summer 2017-Fall 2018) to (1) develop, purchase, and adapt K-1 curriculum and (2) build our Course Scope and Sequence aligned to Indiana Academic Standards, for each content area. In subsequent years, the Leadership team will begin building the new grade-level scope and sequence the winter of the previous year (i.e. 2<sup>nd</sup> Grade Scope and Sequence would start being built in the winter of 18/19 school year in preparation for 19/20 school year). This team will include members of the academic leadership team, teachers, and external curriculum experts. Each summer the Academic Leadership team will engage in a two-day retreat to evaluate the previous year’s scope and sequence and make revisions as needed. **Figure 4.1** provides a timeline for curriculum development for Year 1.

For any purchased or open source curriculum not directly aligned to the Indiana Academic Standards, Allegiant Prep Academy will create an alignment guide to the Indiana Academic Standards, ensuring all Scope and Sequence, Unit Plan, and Daily Lesson Planning Documents are in alignment with the Indiana Academic Standards.

**Figure 4.1: Curriculum Development Timeline**

Time	Action
June-September 2017	<ul style="list-style-type: none"><li>• Head of School recruits and develops curriculum development team to provide consultation on curriculum throughout the year.</li><li>• Head of School takes Indiana Academic Standards and college readiness standards and groups them by grade and subject along the K-8 grade continuum.</li></ul>
October 2017	<ul style="list-style-type: none"><li>• Curricular Review Team hired, as teachers are hired for Y1, they are encouraged to participate.<sup>1</sup></li></ul>
November 2017	<ul style="list-style-type: none"><li>• Curricular Review Team reviews standards Head of School has created and provided input; Head of School finalizes K and 1 standards.</li><li>• Curricular Review Team members distribute subjects, ELA, Math, Science, and Social Studies, and create pacing guides for K-1.</li></ul>
December 2017	<ul style="list-style-type: none"><li>• Curricular Review Team creates assessment bank, which illustrates types of questions appropriate and to what depth for each grade level/subject. They draw on criterion and norm referenced tests and work from most successful college preparatory schools.</li><li>• Pacing Guides Completed, K-1</li></ul>
January 2018	<ul style="list-style-type: none"><li>• Curricular Review Team continues assessment bank work and create sample interim 1 assessment for K and 1: ELA, Math, Science, Social Studies.</li><li>• Curricular Review Team creates writing rubrics for grades K and 1.</li><li>• Head of School finalizes curricular choices.</li></ul>

---

<sup>1</sup> \$3,200 allocated in planning year for Curricular Review Team as consultants, consisting of proven elementary school instructional leaders.

---

February-March 2018	<ul style="list-style-type: none"> <li>Curricular Review Team creates remaining interim assessments for Math, ELA, Science, and Social Studies for K-1.</li> <li>Head of School drafts enrichment standards and exit requirements for K-8.</li> <li>School Operations Manager orders upcoming pre-created curriculum such as Reading Mastery. School Operations Manager purchases all external assessments, such as NWEA MAP testing and STEP.</li> <li>Head of School creates Unit Plan template and accompanying PD</li> <li>Head of School vets and approves interim assessments.</li> </ul>
April-June 2018	<ul style="list-style-type: none"> <li>Curricular Review Team creates Unit 1 plans and scripted Unit 1 lesson plans for instructional blocks. Read Aloud, Guided Reading, Independent practice (ELA), Writing, Problem Solving, Calendar Math, Math Block, Science, and Social Studies</li> <li>Head of School vets and approves Unit Plans and corresponding lesson plans.</li> </ul>
July-August 2018	<ul style="list-style-type: none"> <li>Teachers work with standards and interim assessments to create Unit 2 plans for assigned subjects for K and 1.</li> <li>Head of School provides feedback and approval.</li> <li>Head of School leads teacher training in execution of Math, Science, Social Studies, CGI, phonics, and guided reading. Teachers are trained in STEP execution and grading.</li> </ul>
Winter 2018	<ul style="list-style-type: none"> <li>Head of School with 1-2 teachers create pacing guides for 2<sup>nd</sup> grade, and collects assessment pool for ELA, Math, Science, and Social Studies.</li> </ul>

**Figure 4.2** is a sample content scope and sequence for our Lower and Upper Academy that was created from curricular materials used and recommended by high-performing Building Excellent Schools including Nashville Classical and Great Lakes Academy.<sup>2</sup>

We will align Indiana Academic Standards to the academic needs of student on the Westside. We will evaluate the success of our curriculum and instructional materials on an annual basis and make necessary adjustments to ensure the needs of our students are being met.

<b>Figure 4.2: Proposed K-8 Core Academic Curriculum</b>				
<b>Grades</b>	<b>Literacy</b>	<b>Mathematics</b>	<b>Science</b>	<b>Social Studies</b>
K-4	<b>Reading:</b> Core Knowledge, Literacy Centers, Guided Reading/Reading Comprehension (internally developed) <b>Phonemic Awareness:</b> Reading Mastery <b>Writing:</b> Lucy Calkins <b>Online</b> <b>Learning:</b> Lexia	<b>Every Day Counts Math</b> (Calendar Math K-2), <b>EngageNY</b> (Number sense, computation, algebraic thinking, geometry, measurement), <b>CGI</b> (problem solving)	Core Knowledge	Core Knowledge
5-8	<b>Reading comprehension</b> across genres (internally created), <b>Book Clubs</b> , and <b>Grammar</b>	<b>Procedures</b> (computation) and <b>Problem Solving</b> , both internally created	Internally Created	Internally created

<sup>2</sup> This was informed directly from the work at Nashville Classical Charter School Nashville, TN and Great Lakes Academy Charter School Chicago, IL.

### Core Knowledge Language Arts: Scope and Sequence-Skills Strand-Kindergarten

The Skills strand of the Core Knowledge Language Arts program teaches students the decoding skills needed for (future) independent reading. Each Skills lesson begins with a warm-up, reviewing previously taught content in reading, writing, and/or grammar. All reading times—denoted below as demonstration stories or whole group, small group, or partner reading—consist of a story preview, presentation, and discussion.

#### Unit 1 (10–13 days)

	Phonics & Reading	Grammar	Spelling	Writing
Lesson 1	Awareness of Noises Left/Right Discrimination			Prewriting Skills: Drawing on a Vertical Surface
Lesson 2	Awareness of Noises Left/Right Discrimination			Prewriting Skills: Vertical Line*
Lesson 3	Awareness of Noises Left/Right Discrimination *			Prewriting Skills: Vertical Line
Lesson 4	Awareness of Noises Left/Right Discrimination Blending Pretest			Prewriting Skills: Horizontal Line*
Lesson 5	Awareness of Noises and Words* Left/Right Discrimination		Prewriting Skills: Circle*	
Lesson 6	Awareness of Noises, Words, and Phrases*			Writing Strokes Pretest Prewriting Skills: Circle
Lesson 7	Awareness of Noises and Words Tracking Practice			Prewriting Skills: Diagonal Line*
Lesson 8	Awareness of Words			Prewriting Skills: Square; Vertical and Horizontal Lines—Review
Lesson 9	Awareness of Words *			Prewriting Skills: Triangle; Circle and Diagonal Line—Review
Lesson 10	Awareness of Words and Phrases Tracking Assessment*			Prewriting Skills: Assessment
Pausing Point	Review: Awareness of Noises, Words, and Phrases Review: Directionality and Tracking		Review: Prewriting Skills	

\*Additional practice offered with Take-Home Material. Occasionally, Take-Home Material consists of a review of prior content not practiced during the lesson it is correlated with. In such cases, the marker (\*) appears on a blank line.

## Unit 2 (10–13 days)

	Phonics & Reading	Grammar	Spelling	Writing
Lesson 1	Tracking Practice			Prewriting Skills: Cup*
Lesson 2	Blending Syllables and Sounds			Prewriting Skills: Hump*
Lesson 3	Blending Sounds into Words Differentiating Shapes		*	Prewriting Skills: Zigzag*
Lesson 4	Blending Sounds into Words Beginning/End Recognition		*	Prewriting Skills: Wavy Line*
Lesson 5	Blending Sounds into Words		*	Prewriting Skills: Spiral Handwriting: Own Name*
Lesson 6	Blending Sounds into Words			Prewriting Skills: X, +* Handwriting: Own Name
Lesson 7	Blending Sounds into Words		*	Prewriting Skills: Loop Handwriting: Own Name*
Lesson 8	Blending Sounds into Words			Prewriting Skills: Cane* Handwriting: Own Name
Lesson 9	Blending Sounds into Words			Prewriting Skills: Hook* Handwriting: Own Name
Lesson 10	Blending Sounds into Words Sound Blending Assessment *			Handwriting: Own Name Prewriting Skills Assessment
Pausing Point	Review: Syllable and Sound Blending, Blending Sounds into Words Review: Tracking			Review: Prewriting Skills Review: Handwriting— Own Name

\*Additional practice offered with Take-Home Material. Occasionally, Take-Home Material consists of a review of prior content not practiced during the lesson it is correlated with. In such cases, the marker (\*) appears on a blank line.

## Unit 3 (14–17 days)

	Phonics & Reading	Grammar	Spelling	Writing
Lesson 1	Sound /m/ Spelled 'm'			Handwriting 'm': Letter
Lesson 2	Sound /a/ Spelled 'a'			Handwriting 'a': Letter
Lesson 3	Sound /t/ Spelled 't' Chaining: One-Syllable Short Vowel Sounds			Handwriting 't': Letter

Lesson 4	Sound /d/ Spelled 'd' Chaining: One-Syllable Short Vowel Sounds *		Handwriting 'd': Letter
Lesson 5	Review: Oral Blending and Sound Spelling Chaining: One-Syllable Short Vowel Sounds†	Chaining: One-Syllable Short Vowel Sounds†	Review: Handwriting 'm', 'a', 't', 'd'—Letter
Lesson 6	Sound /o/ Spelled 'o' Chaining: One-Syllable Short Vowel Sounds *		Handwriting 'o': Letter Handwriting 'm', 'a', 't', 'd': Words*
Lesson 7	Sound /k/ Spelled 'c' Chaining: One-Syllable Short Vowel Sounds *		Handwriting 'c': Letter
Lesson 8	Sound /g/ Spelled 'g' Chaining: One-Syllable Short Vowel Sounds		Handwriting 'g': Letter
Lesson 9	Sound /i/ Spelled 'i' Chaining: One-Syllable Short Vowel Sounds*		Handwriting 'i': Letter and Word*
Lesson 10	Review: Oral Blending and Sound Spelling Chaining: One-Syllable Short Vowel Sounds† *	Chaining: One-Syllable Short Vowel Sounds†	Review: Handwriting 'm', 'a', 't', 'd', 'o', 'c', 'g', 'i'— Letters and Words*
Lesson 11	Chaining: One-Syllable Short Vowel Sounds† Reading Assessment *	Chaining: One-Syllable Short Vowel Sounds†	Word Writing: One- Syllable Short Vowel CVC Words (with Cues)
Lesson 12	Chaining: One-Syllable Short Vowel Sounds† Reading Assessment	Chaining: One-Syllable Short Vowel Sounds†	Word Writing: One- Syllable Short Vowel CVC Words (with Cues)
Lesson 13	* Reading Assessment *	Stomp and Spell: One- Syllable Short Vowel VC and CVC Words	Word Writing: One- Syllable Short Vowel CVC Words (with Cues)

	Phonics & Reading	Grammar	Spelling	Writing
Lesson 14	Reading Assessment *		Stomp and Spell: One- Syllable Short Vowel CVC Words	Word Writing: One- Syllable Short Vowel CVC Words (with Cues)



<b>Pausing Point</b>	Review: Oral Blending and Sound Spelling	Chaining: One-Syllable Short Vowel Sounds	Review: Handwriting—Letters and Words Word Writing: One-Syllable Short Vowel CVC Words (with Cues)
----------------------	--	---	---

\*Additional practice offered with Take-Home Material. Occasionally, Take-Home Material consists of a review of prior content not practiced during the lesson it is correlated with. In such cases, the marker (\*) appears on a blank line.

† Chaining appears in both columns as both Chaining for Reading and Chaining for Spelling are practiced in this lesson.

## Unit 4 (15–18 days)

	Phonics & Reading	Grammar	Spelling	Writing
Lesson 1	Sound /n/ Spelled 'n' Chaining: One-Syllable Short Vowel Words			Handwriting 'n': Letter and Words
Lesson 2	Sound /h/ Spelled 'h'* Chaining: One-Syllable Short Vowel Words			Handwriting 'h': Letter and Words
Lesson 3	Sound /s/ Spelled 's' Chaining: One-Syllable Short Vowel Words			Handwriting 's': Letter and Words
Lesson 4	Sound /f/ Spelled 'f' Chaining: One-Syllable Short Vowel Words			Handwriting 'f': Letter and Words*
Lesson 5	Practice Reading Words		Chaining: One-Syllable Short Vowel Words	
Lesson 6	Sound /v/ Spelled 'v'* Chaining: One-Syllable Short Vowel Words			Handwriting 'v': Letter and Words*
Lesson 7	Sound /z/ Spelled 'z'* Chaining: One-Syllable Short Vowel Words		Dictation: Sounds	Handwriting 'z', 'c', 'a', 'd', 'g': Letters
Lesson 8	Sound /p/ Spelled 'p'* Chaining: One-Syllable Short Vowel Words			Handwriting 'p': Letter and Words
Lesson 9	Sound /e/ Spelled 'e' Chaining: One-Syllable Short Vowel Words			Handwriting 'e': Letter and Words
Lesson 10	*	Introduction to Phrases	Chaining: One-Syllable Short Vowel Words Dictation: Sounds	
Lesson 11	Practice Reading Phrases Reading Assessment *		Chaining: One-Syllable Short Vowel Words Dictation: Sounds	Review: Handwriting 'm', 'n', 'h', 's', 'f', 'v', 'z', 'p', 'e'—Letters
Lesson 12	Demonstration Story Practice Reading Words Reading Assessment		Dictation: Sounds	Word Writing: One-Syllable Short Vowel CVC Words (with Cues)

Lesson 13	Demonstration Story Practice Reading Words* Reading Assessment	Dictation: Sounds and Words	Word Writing: One-Syllable Short Vowel CVC Words (with Cues)
Lesson 14	Reading: Wiggle Cards Practice Reading Words Reading Assessment	Dictation: Words	Word Writing: One-Syllable Short Vowel CVC Words (with Cues)

	Phonics & Reading	Grammar	Spelling	Writing
Lesson 15	Practice Reading Words* Reading Assessment			Word Writing: One-Syllable Short Vowel CVC Words (with Cues)*
Pausing Point	Review: Segmenting and Sound Spelling Practice Reading Words and Phrases Demonstration Story		Dictation: Sounds and One-Syllable Short Vowel CVC Words	Review: Handwriting—Letters and Words Word Writing: One-Syllable Short Vowel CVC Words (with Cues)

\*Additional practice offered with Take-Home Material. Occasionally, Take-Home Material consists of a review of prior content not practiced during the lesson it is correlated with. In such cases, the marker (\*) appears on a blank line.

### Unit 5 (16–19 days)

	Phonics & Reading	Grammar	Spelling	Writing
Lesson 1	Sound /b/ Spelled 'b'* Sound /d/ Spelled 'd'*		Chaining: One-Syllable Short Vowel Words	Handwriting 'b': Letter and Words Word Writing: One-Syllable Short Vowel CVC Words (with Cues)*
Lesson 2	Sound // Spelled 'l'*			Handwriting 'l': Letter and Words Word Writing: One-Syllable Short Vowel CVC Words (with Cues)*
Lesson 3	Sound /r/ Spelled 'r'			Handwriting 'r': Letter and Words Word Writing: One-Syllable Short Vowel CVC Words (with Cues)
Lesson 4	Sound /u/ Spelled 'u'* Reading: Wiggle Cards			Handwriting 'u': Letter and Words* Word Writing: One-Syllable Short Vowel CVC Words (with Cues)
Lesson 5	*		Chaining: One-Syllable Short Vowel Words	Word Writing: One-Syllable Short Vowel CVC Words (with Cues)

Lesson 6	Sound /w/ Spelled 'w'	Chaining: One-Syllable Short Vowel Words	Handwriting 'w': Letter and Words Word Writing: One-Syllable Short Vowel CVC Words (with Cues)*
Lesson 7	Sound /j/ Spelled 'j'		Handwriting 'j': Letter and Words Word Writing: One-Syllable Short Vowel CVC Words (with Cues)*
Lesson 8	Sound /y/ Spelled 'y'*		Handwriting 'y': Letter and Words Word Writing: One-Syllable Short Vowel CVC Words (with Cues)*
Lesson 9	Sound /x/ Spelled 'x' *	Chaining: One-Syllable Short Vowel Words	Handwriting 'x': Letter and Words Phrase Writing: One-Syllable Short Vowel CVC Words (with Cues)

	Phonics & Reading	Grammar	Spelling	Writing
Lesson 10	Spelling Alternative for /k/ Spelled 'k' Practice Reading Words		Chaining: One-Syllable Short Vowel Words	Handwriting 'k': Letter and Words Phrase Writing: One-Syllable Short Vowel VC and CVC Words (with Cues) Word Writing: One-Syllable Short Vowel CVC Words (with Cues)
Lesson 11	*		Dictation: Sounds Practice Spelling Words: Stomp and Spell	Word Writing: One-Syllable Short Vowel CVC Words (with Cues)
Lesson 12	Reading Assessment *		Chaining: One-Syllable Short Vowel Words	Review: Handwriting 'b', 'l', 'r', 'u', 'w', 'k', 'y', 'x', 'j'—Letters
Lesson 13	Demonstration Story Practice Reading Words Reading Assessment		Chaining: One-Syllable Short Vowel Words	Word Writing: One-Syllable Short Vowel CVC Words (with Cues)
Lesson 14	Demonstration Story Practice Reading Phrases Reading Assessment		Chaining: One-Syllable Short Vowel Words	Word Writing: One-Syllable Short Vowel CVC Words (with Cues)*
Lesson 15	Demonstration Story Reading Assessment			Word Writing: One-Syllable Short Vowel CVC Words (with Cues)

<b>Lesson 16</b>	Demonstration Story Practice Reading Phrases* Reading Assessment	Dictation: Sounds Practice Spelling Words: Spelling Hopscotch
<b>Pausing Point</b>	Review: Sound Spelling	Chaining: One-Syllable Short Vowel Words Review: Dictation— Sounds Word Writing: One-Syllable Short Vowel CVC Words (with Cues) Review: Handwriting— Letters and Words

\*Additional practice offered with Take-Home Material. Occasionally, Take-Home Material consists of a review of prior content not practiced during the lesson it is correlated with. In such cases, the marker (\*) appears on a blank line.

## Unit 6 (15–18 days)

	Phonics & Reading	Grammar	Spelling	Writing
<b>Lesson 1</b>	Alphabet/Letter Names Demonstration Story *		Chaining: One-Syllable Short Vowel Words with Consonant Blends, Clusters, and/or Digraphs	
<b>Lesson 2</b>	Alphabet/Letter Names Demonstration Story		Chaining Dictation: One-Syllable Short Vowel Words with Consonant Blends, Clusters, and/or Digraphs	Word Writing: One-Syllable Short Vowel Words with Consonant Blends, Clusters, and/or Digraphs (with Cues)
<b>Lesson 3</b>	Alphabet/Letter Names* Sound /z/ spelled 's' Demonstration Story*		Chaining: One-Syllable Short Vowel Words with Consonant Blends, Clusters, and/or Digraphs	Word Writing: One-Syllable Short Vowel VC and CVC Words (with Cues)
<b>Lesson 4</b>	Sounds /s/ and /z/ Partner Reading			Word Writing: One-Syllable Short Vowel Words in which 's' > /s/ or /z/ (with Cues)*
<b>Lesson 5</b>	Alphabet/Letter Names Demonstration Story Small Group Reading *			
<b>Lesson 6</b>	Reading: Wiggle Cards Small Group Reading* *		Chaining: One-Syllable Short Vowel CVC Words	
<b>Lesson 7</b>	Demonstration Story Small Group Reading* *		Dictation: One-Syllable Short Vowel CVC, CCVC, and CVCC Words	
<b>Lesson 8</b>	Rhyming Words Small Group Reading *		Chaining: One-Syllable Short Vowel Words with Consonant Blends, Clusters, and/or Digraphs	

Lesson 9	Demonstration Story Partner Reading* *	Dictation: One-Syllable Short Vowel CVC, CVCC, CCVC, and CCVCC Words
Lesson 10	Demonstration Story Small Group Reading* *	Practice: Tap and Spell
Lesson 11	Review: Rhyming Words Small Group Reading	Chaining: One-Syllable Short Vowel Words with Consonant Blends, Clusters, and/or Digraphs

	Phonics & Reading	Grammar	Spelling	Writing
Lesson 12	Review: Letter Names, Rhyming Words* Demonstration Story Whole Group Reading*			
Lesson 13	Review: Letter Names* *		Chaining: One-Syllable Short Vowel Words with Consonant Blends, Clusters, and/or Digraphs	Word Writing: One- Syllable Short Vowel CVCC and CCVCC Words (with Cues)
Lesson 14	Demonstration Story Small Group Reading *		Dictation: One-Syllable Short Vowel CVC, CCVC, CVCC, and CCVCC Words	
Lesson 15	Assessment: Letter Names, Rhyming Words Small Group Reading Reading Assessment Analysis and Interpretation Assessment			Word Writing: One- Syllable Short Vowel CVCC, CCVC, and CCVCC Words (with Cues)
Pausing Point	Review: Sound Spelling, Letter Names, Rhyming Words* Demonstration Stories Partner Reading*		Chaining: One-Syllable Short Vowel Words with Digraphs Dictation: Words and Phrases	Word Writing: One- Syllable Short Vowel CVCC, CVCCC, and CCVCC Words (with Cues) Review: Handwriting— Letters and Words

\*Additional practice offered with Take-Home Material. Occasionally, Take-Home Material consists of a review of prior content not practiced during the lesson it is correlated with. In such cases, the marker (\*) appears on a blank line. Further, in all cases of reading practice, the story is one previously read which parents are encouraged to have their children read aloud to them.

# EngagenY Mathematics Curriculum

Pre-Kindergarten	Kindergarten	Grade 1	Grade 2	Grade 3	Grade 4	Grade 5
20 days	M1: Numbers to 5 (45 days)	M1: Sums and Differences to 10 (45 days)	M1: Sums and Differences to 20 (10 days) M2: Addition and Subtraction of Length Units (12 days)	M1: Properties of Multiplication and Division and Solving Problems with Units of 2-5 and 10 (25 days)	M1: Place Value, Rounding, and Algorithms for Addition and Subtraction (25 days)	M1: Place Value and Decimal Fractions (20 days)
20 days	M2: Two-Dimensional and Three-Dimensional Shapes (15 days) M3: Counting to Answer Questions of How Many (50 days)	M1: Sums and Differences to 10 (45 days) M2: Introduction to Place Value Through Addition and Subtraction Within 20 (35 days) M3: Ordering and Comparing Length Measurements as Numbers (15 days)	M3: Place Value, Counting, and Comparison of Numbers to 1000 (25 days) M4: Addition and Subtraction Within 200 with Word Problems to 100 (35 days) M5: Addition and Subtraction Within 1000 with Word Problems to 100 (24 days)	M2: Place Value and Problem Solving with Units of Measure (25 days) M3: Multiplication and Division with Units of 0, 1, 6-9, and Multiples of 10 (25 days) M4: Multiplication and Area (20 days)	*M2: Unit Conversions (7 days) M3: Multi-Digit Multiplication and Division (43 days) M4: Angle Measure and Plane Figures (20 days)	M2: Multi-Digit Whole Number and Decimal Fraction Operations (35 days) M3: Addition and Subtraction of Fractions (22 days) M4: Multiplication and Division of Fractions and Decimal Fractions (38 days)
20 days	M4: Comparison of Length, Weight, Capacity, and Numbers to 10 (38 days)	M4: Place Value, Comparison, Addition and Subtraction to 40 (35 days) M5: Identifying, Composing, and Partitioning Shapes (15 days)	M6: Foundations of Multiplication and Division (24 days) M7: Problem Solving with Length, Money, and Data (30 days) M8: Time, Shapes, and Fractions as Equal Parts of Shapes (20 days)	M5: Fractions as Numbers on the Number Line (35 days) M6: Collecting and Displaying Data (10 days)	M5: Fraction Equivalence, Ordering, and Operations (45 days)	M5: Addition and Multiplication with Volume and Area (25 days)
20 days	M4: Comparison of Length, Weight, and Capacity (35 days)	M6: Place Value, Comparison, Addition and Subtraction to 100 (30 days) M6: Analyzing, Comparing, and Composing Shapes (10 days)	M7: Problem Solving with Length, Money, and Data (30 days) M8: Time, Shapes, and Fractions as Equal Parts of Shapes (20 days)	M7: Geometry and Measurement Word Problems (40 days)	M6: Decimal Fractions (20 days) M7: Exploring Multiplication (20 days)	M6: Problem Solving with the Coordinate Plane (40 days)
20 days	M5: Numerals to 5, Addition and Subtraction Stories, Counting to 20 (35 days)	M5: Numbers 10-20 and Counting to 100 (30 days)	M7: Problem Solving with Length, Money, and Data (30 days) M8: Time, Shapes, and Fractions as Equal Parts of Shapes (20 days)	M7: Geometry and Measurement Word Problems (40 days)	M6: Decimal Fractions (20 days) M7: Exploring Multiplication (20 days)	M6: Problem Solving with the Coordinate Plane (40 days)



Approx. test date for grades 3-5

\*Please refer to grade-level descriptions to identify partially labeled modules and the standards corresponding to all modules.

<b>Key:</b>	<b>Geometry</b>	<b>Number</b>	<b>Number and Geometry, Measurement</b>	<b>Fractions</b>
-------------	-----------------	---------------	---	------------------

## Science Curriculum

<b>Figure 4.3: Proposed K-8 Science Curriculum</b>		
<b>Grades</b>	<b>Curriculum</b>	<b>Description</b>
K-4	Core Knowledge	In grades K-4 we use the Indiana Academic Standards and Core Knowledge Science resources to plan our science curriculum. Teachers will lead instruction with students through reading aloud, observation, and activities. In our early grades students focus on observation and description and as they matriculate to the next grades they will focus on developing technical explanations of scientific phenomenon's.
5-8	Internally Created	Teachers will work to create lesson and unit plans aligned to Indiana Academic Standards .Students in grades 5-8 will engage in hands on experiences and observations within 4 domains: Physical Science, Earth and Space Science, Life Science, and Engineering

## Social Studies Curriculum

<b>Figure 4.4: Proposed K-8 Social Studies Curriculum</b>		
<b>Grades</b>	<b>Curriculum</b>	<b>Description</b>
K-4	Core Knowledge	In grades K-4 we use the Indiana Academic Standards and Core Knowledge Social Studies resources to plan our Social Studies curriculum. Teachers will lead instruction with students through a study of major events and figures, from the earliest days to recent times. Students will also learn about different elements of geography including spatial sense of the world, awareness of physical processes that shape life, a sense of the interactions between humans and their environment, an understanding of the relations between place and culture, and an awareness of the characteristics of specific regions and cultures.
5-8	Internally Created	Teachers will work to create lesson and unit plans aligned to Indiana Academic State standards. Students in grades 5-8 will compare the history, geography, government, economic systems, current issues, and cultures of the Western World.



**ALLEGIANT PREP**  
ACADEMY

# Attachment 5

Academic and Exit Standards



## Attachment 5: Exit Standards

Please provide the school's exit standards for graduating students for each division of the school as applicable (elementary, middle and/or high school). Exit standards should clearly set forth what students in the last grade in each division will know and be able to do.

---

### GRADE 8

#### READING: Literature

There are three key areas found in the Reading: Literature section for grades 6-12: Key Ideas and Textual Support, Structural Elements and Organization, and Synthesis and Connection of Ideas. By demonstrating the skills listed in each section, students should be able to meet the Learning Outcome for Reading: Literature.

#### Learning Outcome

- 8.RL.1** Read a variety of literature within a range of complexity appropriate for grades 6-8. By the end of grade 8, students interact with texts proficiently and independently.

#### Key Ideas and Textual Support

- 8.RL.2.1** Cite the textual evidence that most strongly supports an analysis of what a text says explicitly as well as inferences drawn from the text.
- 8.RL.2.2** Analyze the development of a theme or central idea over the course of a work of literature, including its relationship to the characters, setting, and plot; provide a detailed summary that supports the analysis.
- 8.RL.2.3** Analyze how particular lines of dialogue or incidents in a work of literature propel the action, reveal aspects of a character, or provoke a decision.
- 8.RL.2.4** Students are expected to build upon and continue applying concepts learned previously.

#### Structural Elements and Organization

- 8.RL.3.1** Compare and contrast structure of two or more related works of literature (e.g., similar topic/ theme), and analyze and evaluate how differing structure of each text contributes to its meaning and style.
- 8.RL.3.2** Analyze a particular point of view or cultural experience in a work of world literature considering how it reflects heritage, traditions, attitudes, and beliefs.

#### Synthesis and Connection of Ideas

- 8.RL.4.1** Analyze the extent to which a filmed or live production of a story or play stays faithful to or departs from the text or script, evaluating the choices made by the director or actors.
- 8.RL.4.2** Analyze how works of literature draw on and transform earlier texts.

#### READING: Nonfiction

There are three key areas found in the Reading: Nonfiction section for grades 6-12: Key Ideas and Textual Support, Structural Elements and Organization, and Synthesis and Connection of Ideas. By demonstrating the skills listed in each section, students should be able to meet the Learning Outcome for Reading: Nonfiction.

#### Learning Outcome

- 8.RN.1** Read a variety of nonfiction within a range of complexity appropriate for grades 6-8. By the end of grade 8, students interact with texts proficiently and independently.

#### Key Ideas and Textual Support

- 8.RN.2.1** Cite the textual evidence that most strongly supports an analysis of what a text says explicitly as well as inferences drawn from the text.
- 8.RN.2.2** Analyze the development of a central idea over the course of a text, including its relationship to supporting ideas; provide a detailed, objective summary of the text.
- 8.RN.2.3** Analyze how a text makes connections and distinctions among individuals, events, and ideas.

## Structural Elements and Organization

- 8.RN.3.1 Students are expected to build upon and continue applying concepts learned previously.
- 8.RN.3.2 Analyze in detail the structure of a specific paragraph in a text, including the role of particular sentences in developing and refining a key concept.
- 8.RN.3.3 Determine an author’s perspective or purpose in a text, and analyze how the author acknowledges and responds to conflicting evidence or viewpoints.

## Synthesis and Connection of Ideas

- 8.RN.4.1 Delineate and evaluate the argument and specific claims in a text, assessing whether the reasoning is sound and the evidence is relevant and sufficient; recognize when irrelevant evidence is introduced.
- 8.RN.4.2 Evaluate the advantages and disadvantages of using different mediums (e.g., print or digital text, video, multimedia) to present a particular topic or idea.
- 8.RN.4.3 Analyze a case in which two or more texts provide conflicting information on the same topic and identify where the texts disagree on matters of fact or interpretation.

**READING: Vocabulary** There are two key areas found in the Reading: Vocabulary section for grades 6-12: Vocabulary Building and Vocabulary in Literature and Nonfiction Texts. By demonstrating the skills listed in each section, students should be able to meet the Learning Outcome for Reading: Vocabulary.

### Learning Outcome

- 8.RV.1 Acquire and use accurately grade-appropriate general academic and content-specific words and phrases; gather vocabulary knowledge when considering a word or phrase important to comprehension or expression.

### Vocabulary Building

- 8.RV.2.1 Use context to determine or clarify the meaning of words and phrases.
- 8.RV.2.2 Students are expected to build upon and continue applying concepts learned previously.
- 8.RV.2.3 Distinguish among the connotations of words with similar denotations.
- 8.RV.2.4 Use common, grade-appropriate Greek or Latin affixes and roots as clues to the meaning of a word (e.g., precede, recede, secede).
- 8.RV.2.5 Select appropriate general and specialized reference materials, both print and digital, to find the pronunciation of a word or determine or clarify its precise meaning, part of speech, or origin.

### Vocabulary in Literature and Nonfiction Texts

- 8.RV.3.1 Analyze the meaning of words and phrases as they are used in works of literature, including figurative and connotative meanings; analyze the impact of specific word choices on meaning and tone, including analogies or allusions to other texts.
- 8.RV.3.2 Determine the meaning of words and phrases as they are used in a nonfiction text, including figurative, connotative, and technical meanings; analyze the impact of specific word choices on meaning and tone, including analogies or allusions to other texts.
- 8.RV.3.3 Interpret figures of speech (e.g., verbal irony, puns) in context.

## WRITING

**Guiding Principle:** Students employ a wide range of strategies as they write and use different writing process elements appropriately to communicate with different audiences for a variety of purposes. Students apply knowledge of language structure, language conventions, media techniques, figurative language, and genre to create, critique, and discuss writing. Students conduct research on issues and interests by generating ideas and questions, and by posing problems.

They gather, evaluate, and synthesize data from a variety of sources to communicate their discoveries in ways that suit their purpose and audience.

## **WRITING**

There are four key areas found in the Writing section for grades 6-12: Writing Genres, the Writing Process, the Research Process, and Conventions of Standard English. By demonstrating the skills listed in each section, students should be able to meet the Learning Outcome for Writing.

### **Learning Outcome**

- 8.W.1** Write routinely over a variety of time frames for a range of tasks, purposes, and audiences; apply reading standards to support analysis, reflection, and research by drawing evidence from literature and nonfiction texts.

### **Handwriting**

- 8.W.2** Students are expected to build upon and continue applying concepts learned previously.

### **Writing Genres: Argumentative, Informative, and Narrative**

- 8.W.3.1** Write **arguments** in a variety of forms that –
- Introduce claim(s), acknowledge and distinguish the claim(s) from alternate or opposing claims, and organize the reasons and evidence logically.
  - Support claim(s) with logical reasoning and relevant evidence, using accurate, credible sources and demonstrating an understanding of the topic or text.
  - Use effective transitions to create cohesion and clarify the relationships among claim(s), counterclaims, reasons, and evidence.
  - Establish and maintain a consistent style and tone appropriate to purpose and audience.
  - Provide a concluding statement or section that follows from and supports the argument presented.
- Write **informative** compositions in a variety of forms that –
- 8.W.3.2**
- Introduce a topic clearly, previewing what is to follow; organize ideas, concepts, and information into broader categories; include formatting (e.g., headings), graphics (e.g., charts, tables), and multimedia when useful to aiding comprehension.
  - Develop the topic with relevant, well-chosen facts, definitions, concrete details, quotations, or other information and examples from various sources and texts.
  - Use appropriate and varied transitions to create cohesion and clarify the relationships among ideas and concepts.
  - Choose language and content-specific vocabulary that express ideas precisely and concisely, recognizing and eliminating wordiness and redundancy.
  - Establish and maintain a style appropriate to the purpose and audience.
  - Provide a concluding statement or section that follows from and supports the information or explanation presented.
- 8.W.3.3** Write **narrative** compositions in a variety of forms that –
- Engage and orient the reader by establishing a context and point of view and introducing a narrator and/or characters.
  - Organize an event sequence (e.g., conflict, climax, resolution) that unfolds naturally and logically, using a variety of transition words, phrases, and clauses to convey sequence and signal shifts from one time frame or setting to another.
  - Use narrative techniques, such as dialogue, pacing, description, and reflection, to develop experiences, events, and/or characters.
  - Use precise words and phrases, relevant descriptive details, and sensory language to capture the action and convey experiences and events.
  - Provide an ending that follows from and reflects on the narrated experiences or events.

## The Writing Process

- 8.W.4** Apply the **writing process** to –
- Plan and develop; draft; revise using appropriate reference materials; rewrite; try a new approach; and edit to produce and strengthen writing that is clear and coherent, with some guidance and support from peers and adults.
  - Use technology to interact and collaborate with others to generate, produce, and publish writing and present information and ideas efficiently.

## The Research Process: Finding, Assessing, Synthesizing, and Reporting Information

- 8.W.5** Conduct short research assignments and tasks to build knowledge about the research process and the topic under study.
- Formulate a research question.
  - Gather relevant information from multiple sources, using search terms effectively, and annotate sources.
  - Assess the credibility and accuracy of each source.
  - Quote or paraphrase the information and conclusions of others.
  - Avoid plagiarism and follow a standard format for citation.
  - Present information, choosing from a variety of formats.

## Conventions of Standard English: Grammar and Usage / Capitalization, Punctuation, and Spelling

- 8.W.6.1** Demonstrate command of English grammar and usage, focusing on:
- 8.W.6.1a** **Pronouns** – Students are expected to build upon and continue applying conventions learned previously.
- 8.W.6.1b** **Verbs** – Explaining the function of verbals (gerunds, participles, infinitives) in general and their function in particular sentences; forming and using active and passive voice; recognizing and correcting inappropriate shifts in verb voice.
- 8.W.6.1c** **Adjectives and Adverbs** – Students are expected to build upon and continue applying conventions learned previously.
- 8.W.6.1d** **Phrases and Clauses** – Students build upon and continue applying conventions learned previously.
- 8.W.6.1e** **Usage** – Students are expected to build upon and continue applying conventions learned previously.
- 8.W.6.2** Demonstrate command of the conventions of standard English capitalization, punctuation, and spelling focusing on:
- 8.W.6.2a** **Capitalization** – Students are expected to build upon and continue applying conventions learned previously.
- 8.W.6.2b** **Punctuation** – Using punctuation (comma, ellipsis, dash) to indicate a pause, break, or omission.
- 8.W.6.2c** **Spelling** – Students are expected to build upon and continue applying conventions learned previously.

## SPEAKING AND LISTENING

**Guiding Principle:** Students listen actively and communicate effectively for a variety of purposes, including for learning, enjoyment, persuasion, and the exchange of information and ideas. Students adjust their use of language to communicate effectively with a variety of audiences and for different purposes. Students develop an understanding of and respect for diversity in language use, patterns, and dialects.<sup>i</sup>

## SPEAKING AND LISTENING

There are three key areas found in the Speaking and Listening section for grades 6-12: Discussion and Collaboration, Comprehension, and Presentation of Knowledge and Ideas. By demonstrating the skills listed in each section, students should be able to meet the Learning Outcome for Speaking and Listening.

### Learning Outcome

- 8.SL.1** Listen actively and adjust the use of spoken language (e.g., conventions, style, vocabulary) to communicate effectively with a variety of audiences and for different purposes.

## Discussion and Collaboration

- 8.SL.2.1** Engage effectively in a range of collaborative discussions (one-on-one, in groups, and teacher-led) on grade-appropriate topics, texts, and issues, building on others' ideas, expressing personal ideas clearly.
- 8.SL.2.2** Examine, analyze, and reflect on ideas under discussion by identifying specific evidence from materials under study and other resources.
- 8.SL.2.3** Follow rules for considerate discussions and decision-making, track progress toward specific goals and deadlines, and define individual roles as needed.
- 8.SL.2.4** Pose questions that connect the ideas of several speakers and respond to others' questions and comments with relevant evidence, observations, and ideas.
- 8.SL.2.5** Acknowledge new information expressed by others, and, when warranted, qualify or justify personal views in reference to the evidence presented.

## Comprehension

- 8.SL.3.1** Analyze the purpose of information presented in diverse media and formats (e.g., visually, quantitatively, orally) and evaluate the motives (e.g., social, commercial, political) behind its presentation.
- 8.SL.3.2** Delineate a speaker's argument and specific claims, evaluating the soundness of the reasoning and relevance and sufficiency of the evidence and identifying when irrelevant evidence is introduced.

## Presentation of Knowledge and Ideas

- 8.SL.4.1** Present claims and findings, emphasizing salient points in a focused, coherent manner with relevant evidence, sound valid reasoning, and well-chosen details; use appropriate eye contact, adequate volume, and clear pronunciation.
- 8.SL.4.2** Create engaging presentations that integrate multimedia components and visual displays to clarify information, strengthen claims and evidence, and add interest.
- 8.SL.4.3** Students are expected to build upon and continue applying concepts learned previously.

## MEDIA LITERACY

**Guiding Principle:** Students develop critical thinking about the messages received and created by media. Students recognize that media are a part of culture and function as agents of socialization and develop understanding that people use individual skills, beliefs, and experiences to construct their own meanings from media messages. Students develop media literacy skills in order to become more informed, reflective, and engaged participants in society.<sup>ii</sup>

## **MEDIA LITERACY**

By demonstrating the skills listed in Media Literacy, students should be able to meet the Learning Outcome for Media Literacy.

### **Learning Outcome**

- 8.ML.1** Critically analyze information found in electronic, print, and mass media used to inform, persuade, entertain, and transmit culture.

### **Media Literacy**

- 8.ML.2.1** Identify and analyze persuasive and propaganda techniques used in visual and verbal messages by electronic, print and mass media, and identify false or misleading information.
- 8.ML.2.2** Analyze and interpret how people experience media messages differently, depending on point of view, culture, etc.

---

<sup>i</sup> Ibid.

<sup>ii</sup> Adapted from Standards for the English Language. National Council of Teachers of English and International Reading Association, 1996. Available at <http://www.ncte.org/library/NCTEFiles/Resources/Books/Sample/StandardsDoc.pdf>.

## Mathematics Exit Standards

### **MATHEMATICS: GRADE 8**

*The Mathematics standards for grade 8 are supplemented by the Process Standards for Mathematics.*

The Mathematics standards for grade 8 are made up of 5 strands: Number Sense; Computation; Algebra and Functions; Geometry and Measurement; and Data Analysis, Statistics, and Probability. The skills listed in each strand indicate what students in grade 8 should know and be able to do in Mathematics.

#### **NUMBER SENSE**

<b>GRADE 8</b>
<b>8.NS.1:</b> Give examples of rational and irrational numbers and explain the difference between them. Understand that every number has a decimal expansion; for rational numbers, show that the decimal expansion terminates or repeats, and convert a decimal expansion that repeats into a rational number.
<b>8.NS.2:</b> Use rational approximations of irrational numbers to compare the size of irrational numbers, plot them approximately on a number line, and estimate the value of expressions involving irrational numbers.
<b>8.NS.3:</b> Given a numeric expression with common rational number bases and integer exponents, apply the properties of exponents to generate equivalent expressions.
<b>8.NS.4:</b> Use square root symbols to represent solutions to equations of the form $x^2 = p$ , where $p$ is a positive rational number.

#### **COMPUTATION**

<b>GRADE 8</b>
<b>8.C.1:</b> Solve real-world problems with rational numbers by using multiple operations.
<b>8.C.2:</b> Solve real-world and other mathematical problems involving numbers expressed in scientific notation, including problems where both decimal and scientific notation are used. Interpret scientific notation that has been generated by technology, such as a scientific calculator, graphing calculator, or excel spreadsheet.

#### **DATA ANALYSIS, STATISTICS, AND PROBABILITY**

<b>GRADE 8</b>
<b>8.DSP.1:</b> Construct and interpret scatter plots for bivariate measurement data to investigate patterns of association between two quantitative variables. Describe patterns such as clustering, outliers, positive or negative association, linear association, and nonlinear association.
<b>8.DSP.2:</b> Know that straight lines are widely used to model relationships between two quantitative variables. For scatter plots that suggest a linear association, informally fit a straight line, and describe the model fit by judging the closeness of the data points to the line.
<b>8.DSP.3:</b> Write and use equations that model linear relationships to make predictions, including interpolation and extrapolation, in real-world situations involving bivariate measurement data; interpret the slope and y-intercept.
<b>8.DSP.4:</b> Understand that, just as with simple events, the probability of a compound event is the fraction of outcomes in the sample space for which the compound event occurs. Understand and use appropriate terminology to describe independent, dependent, complementary, and mutually exclusive events.
<b>8.DSP.5:</b> Represent sample spaces and find probabilities of compound events (independent and dependent) using methods, such as organized lists, tables, and tree diagrams.
<b>8.DSP.6:</b> For events with a large number of outcomes, understand the use of the multiplication counting principle. Develop the multiplication counting principle and apply it to situations with a large number of outcomes.

## ALGEBRA AND FUNCTIONS

GRADE 8
<b>8.AF.1:</b> Solve linear equations with rational number coefficients fluently, including equations whose solutions require expanding expressions using the distributive property and collecting like terms. Represent real-world problems using linear equations and inequalities in one variable and solve such problems.
<b>8.AF.2:</b> Give examples of linear equations in one variable with one solution, infinitely many solutions, or no solutions. Show which of these possibilities is the case by transforming a given equation into simpler forms, until an equivalent equation of the form $x = a$ , $a = a$ , or $a = b$ results (where $a$ and $b$ are different numbers).
<b>8.AF.3:</b> Understand that a function assigns to each $x$ -value (independent variable) exactly one $y$ -value (dependent variable), and that the graph of a function is the set of ordered pairs $(x,y)$ .
<b>8.AF.4:</b> Describe qualitatively the functional relationship between two quantities by analyzing a graph (e.g., where the function is increasing or decreasing, linear or nonlinear, has a maximum or minimum value). Sketch a graph that exhibits the qualitative features of a function that has been verbally described.
<b>8.AF.5:</b> Interpret the equation $y = mx + b$ as defining a linear function, whose graph is a straight line; give examples of functions that are not linear. Describe similarities and differences between linear and nonlinear functions from tables, graphs, verbal descriptions, and equations.
<b>8.AF.6:</b> Construct a function to model a linear relationship between two quantities given a verbal description, table of values, or graph. Recognize in $y = mx + b$ that $m$ is the slope (rate of change) and $b$ is the $y$ -intercept of the graph, and describe the meaning of each in the context of a problem.
<b>8.AF.7:</b> Compare properties of two linear functions given in different forms, such as a table of values, equation, verbal description, and graph (e.g., compare a distance-time graph to a distance-time equation to determine which of two moving objects has greater speed).
<b>8.AF.8:</b> Understand that solutions to a system of two linear equations correspond to points of intersection of their graphs because points of intersection satisfy both equations simultaneously. Approximate the solution of a system of equations by graphing and interpreting the reasonableness of the approximation.

## GEOMETRY AND MEASUREMENT

GRADE 8
<b>8.GM.1:</b> Identify, define and describe attributes of three-dimensional geometric objects (right rectangular prisms, cylinders, cones, spheres, and pyramids). Explore the effects of slicing these objects using appropriate technology and describe the two-dimensional figure that results.
<b>8.GM.2:</b> Solve real-world and other mathematical problems involving volume of cones, spheres, and pyramids and surface area of spheres.
<b>8.GM.3:</b> Verify experimentally the properties of rotations, reflections, and translations, including: lines are mapped to lines, and line segments to line segments of the same length; angles are mapped to angles of the same measure; and parallel lines are mapped to parallel lines.
<b>8.GM.4:</b> Understand that a two-dimensional figure is congruent to another if the second can be obtained from the first by a sequence of rotations, reflections, and translations. Describe a sequence that exhibits the congruence between two given congruent figures.
<b>8.GM.5:</b> Understand that a two-dimensional figure is similar to another if the second can be obtained from the first by a sequence of rotations, reflections, translations, and dilations. Describe a sequence that exhibits the similarity between two given similar figures.
<b>8.GM.6:</b> Describe the effect of dilations, translations, rotations, and reflections on two-dimensional figures using coordinates.
<b>8.GM.7:</b> Use inductive reasoning to explain the Pythagorean relationship.
<b>8.GM.8:</b> Apply the Pythagorean Theorem to determine unknown side lengths in right triangles in real-world and other mathematical problems in two dimensions.
<b>8.GM.9:</b> Apply the Pythagorean Theorem to find the distance between two points in a coordinate plane.

Science Exit Standards

<b>LEARNING OUTCOMES</b>	<b>LST.1: LEARNING OUTCOME FOR LITERACY IN SCIENCE/TECHNICAL SUBJECTS</b> <b>Read and comprehend science and technical texts independently and proficiently and write effectively for a variety of discipline-specific tasks, purposes, and audiences</b>
	<b>6-8.LST.1.1:</b> Read and comprehend science and technical texts within a range of complexity appropriate for grades 6-8 independently and proficiently by end of grade 8.
	<b>6-8.LST.1.2:</b> Write routinely over a variety of time frames for a range of discipline-specific tasks, purposes, and audiences.
<b>KEY IDEAS AND TEXTUAL SUPPORT</b>	<b>LST.2: KEY IDEAS AND TEXTUAL SUPPORT (READING)</b> <b>Extract and construct meaning from science and technical texts using a comprehension skills</b>
	<b>6-8.LST.2.1:</b> Cite specific textual evidence to support analysis of science and technical texts.
	<b>6-8.LST.2.2:</b> Determine the central ideas or conclusions of a text; provide an accurate, objective summary of the text.
	<b>6-8.LST.2.3:</b> Follow precisely a multistep procedure when carrying out experiments, taking measurements, or performing technical tasks.
<b>STRUCTURAL ELEMENTS AND ORGANIZATION</b>	<b>LST.3: STRUCTURAL ELEMENTS AND ORGANIZATION (READING)</b> <b>Build understanding of science and technical texts, using knowledge of structural organization and author’s purpose and message</b>
	<b>6-8.LST.3.1:</b> Determine the meaning of symbols, key terms, and other domain-specific words and phrases as they are used in a specific scientific or technical context relevant to grades 6-8 texts and topics.
	<b>6-8.LST.3.2:</b> Analyze the structure an author uses to organize a text, including how the major sections contribute to the whole and to an understanding of the topic.
	<b>6-8.LST.3.3:</b> Analyze the author’s purpose in providing an explanation, describing a procedure, or discussing an experiment in a text.
<b>SYNTHESIS AND CONNECTION OF IDEAS</b>	<b>LST.4: SYNTHESIS AND CONNECTION OF IDEAS (READING)</b> <b>Build understanding of science and technical texts by synthesizing and connecting ideas and evaluating specific claims</b>
	<b>6-8.LST.4.1:</b> Integrate quantitative or technical information expressed in words in a text with a version of that information expressed visually (e.g., <i>in a flowchart, diagram, model, graph, or table</i> ).
	<b>6-8.LST.4.2:</b> Distinguish among facts, reasoned judgment based on research findings, and speculation in a text.
	<b>6-8.LST.4.3:</b> Compare and contrast the information gained from experiments, simulations, video, or multimedia sources with that gained from reading a text on the same topic.
<b>WRITING GENRES</b>	<b>LST.5: WRITING GENRES (WRITING)</b> <b>Write for different purposes and to specific audiences or people</b>
	<b>6-8.LST.5.1:</b> Write arguments focused on discipline-specific content.
	<b>6-8.LST.5.2:</b> Write informative texts, including scientific procedures/experiments or technical processes that include precise descriptions and conclusions from data/research.



<b>THE WRITING PROCESS</b>	<b>LST.6: THE WRITING PROCESS (WRITING)</b> <b>Produce coherent and legible documents by planning, drafting, revising, editing, and collaborating with others</b>
	<b>6-8.LST.6.1:</b> Plan and develop; draft; revise using appropriate reference materials; rewrite; try a new approach; and edit to produce and strengthen writing that is clear and coherent, with some guidance and support from peers and adults.
	<b>6-8.LST.6.2:</b> Use technology to produce and publish writing and present the relationships between information and ideas clearly and efficiently.
<b>THE RESEARCH PROCESS</b>	<b>LST.7: THE RESEARCH PROCESS (WRITING)</b> <b>Build knowledge about the research process and the topic under study by conducting short or more sustained research</b>
	<b>6-8.LST.7.1:</b> Conduct short research assignments and tasks to answer a question (including a self-generated question), or test a hypothesis, drawing on several sources and generating additional related, focused questions that allow for multiple avenues of exploration.
	<b>6-8.LST.7.2:</b> Gather relevant information from multiple sources, using search terms effectively; annotate sources; assess the credibility and accuracy of each source; and quote or paraphrase the data and conclusions of others while avoiding plagiarism and following a standard format for citation (e.g., <i>APA</i> or <i>CSE</i> ).
	<b>6-8.LST.7.3:</b> Draw evidence from informational texts to support analysis, reflection, and research.
<b>Physical Science (PS)</b>	
<b>8.PS.1</b> Create models to represent the arrangement and charges of subatomic particles in an atom (protons, neutrons and electrons). Understand the significance that the currently 118 known chemical elements combine to form all the matter in the universe.	
<b>8.PS.2</b> Illustrate with diagrams (drawings) how atoms are arranged in simple molecules. Distinguish between atoms, elements, molecules, and compounds.	
<b>8.PS.3</b> Use basic information provided for an element (atomic mass, atomic number, symbol, and name) to determine its place on the Periodic Table. Use this information to find the number of protons, neutrons, and electrons in an atom.	
<b>8.PS.4</b> Identify organizational patterns (radius, atomic number, atomic mass, properties and radioactivity) on the Periodic Table.	
<b>8.PS.5</b> Investigate the property of density and provide evidence that properties, such as density, do not change for a pure substance.	
<b>8.PS.6</b> Compare and contrast physical change vs. chemical change. Analyze the properties of substances before and after substances interact to determine if a chemical reaction has occurred.	
<b>8.PS.7</b> Balance chemical equations to show how the total number of atoms for each element does not change in chemical reactions and as a result, mass is always conserved in a closed system. (Law of Conservation of Mass.)	
<b>Life Science (LS)</b>	
<b>8.LS.1</b> Compare and contrast the transmission of genetic information in sexual and asexual reproduction. Research organisms that undergo these two types of reproduction.	

<b>8.LS.2</b> Demonstrate how genetic information is transmitted from parent to offspring through chromosomes via the process of meiosis. Explain how living things grow and develop.
<b>8.LS.3</b> Create and analyze Punnett squares to calculate the probability of specific traits being passed from parents to offspring using different patterns of inheritance.
<b>8.LS.4</b> Differentiate between and provide examples of acquired and genetically inherited traits.
<b>8.LS.5</b> Explain how factors affecting natural selection (competition, genetic variations, environmental changes, and overproduction) increase or decrease a species' ability to survive and reproduce.
<b>8.LS.6</b> Create models to show how the structures of chromatin, chromosomes, chromatids, genes, alleles and deoxyribonucleic acid (DNA) molecules are related and differ.
<b>8.LS.7</b> Recognize organisms are classified into taxonomic levels according to shared characteristics. Explain how an organism's scientific name correlates to these shared characteristics.
<b>8.LS.8</b> Explore and predict the evolutionary relationships between species looking at the anatomical differences among modern organisms and fossil organisms.
<b>8.LS.9</b> Examine traits of individuals within a species that may give them an advantage or disadvantage to survive and reproduce in stable or changing environment.
<b>8.LS.10</b> Gather and synthesize information about how humans alter organisms genetically through a variety of methods.
<b>8.LS.11</b> Investigate how viruses and bacteria affect the human body.
<b>Earth and Space Science (ESS)</b>
<b>8.ESS.1</b> Research global temperatures over the past century. Compare and contrast data in relation to the theory of climate change.
<b>8.ESS.2</b> Create a diagram or carry out a simulation to describe how water is cycled through the earth's crust, atmosphere and oceans. Explain how the water cycle is driven by energy from the sun and the force of gravity.
<b>8.ESS.3</b> Research how human consumption of finite natural resources (i.e. coal, oil, natural gas, and clean water) and human activities have had an impact on the environment (i.e. causes of air, water, soil, light, and noise pollution).
<b>Engineering (E)</b>
<b>6-8.E.1</b> Identify the criteria and constraints of a design to ensure a successful solution, taking into account relevant scientific principles and potential impacts on people and the natural environment that may limit possible solutions.
<b>6-8.E.2</b> Evaluate competing design solutions using a systematic process to identify how well they meet the criteria and constraints of the problem.
<b>6-8.E.3</b> Analyze data from investigations to determine similarities and differences among several design solutions to identify the best characteristics of each that can be combined into a new solution to better meet the criteria for success.
<b>6-8.E.4</b> Develop a prototype to generate data for repeated investigations and modify a proposed object, tool, or process such that an optimal design can be achieved.

**CONTENT STANDARDS**  
**Standard 1 History**

**The American Revolution and Founding of the United States: 1754 to 1801**

- 8.1.1** Identify the major Native American Indian groups of eastern North America and describe early conflict and cooperation between European settlers and these Native American groups.
- 8.1.2** Compare and contrast reasons for British, French, Spanish and Dutch colonization in the New World.
- 8.1.3** Explain the conditions, causes, consequences and significance of Britain’s struggle to maintain control of colonies during the French and Indian War (1754–1763).
- 8.1.4** Identify and explain the reasons and actions for the resistance and rebellion against British imperial rule by the thirteen colonies in North America (1761–1775).
- 8.1.5** Analyze the causes and effects of the Revolutionary War (1775–1783), including the ideas from the Declaration of Independence, the enactment of the Articles of Confederation and the Treaty of Paris (1783).
- 8.1.6** Identify and give the significance of major events in the creation of the Constitution such as: the enactment of state constitutions, the Constitutional conventions, the willingness to compromise, and the Federalist-anti Federalist debates regarding the vote to ratify the Constitution.
- 8.1.7** Identify and explain the steps taken during the Washington Administration and the First and Second Congresses of the United States to establish a stable and lasting national government.
- 8.1.8** Compare and contrast the views of Thomas Jefferson and Alexander Hamilton and explain how their differences gave rise to the development of political parties.
- 8.1.9** Identify the events leading up to the presidential and congressional election of 1800 and the transfer of political authority and power to the Democratic-Republican Party led by Thomas Jefferson (1801); Evaluate the significance of these events.
- 8.1.10** Analyze the influence of important individuals on social and political developments of the time (1775 – 1800) such as the Independence movement and the framing of the Constitution.
- 8.1.11** Compare and contrast the ways of life in the northern and southern states, including the growth of towns and cities and the growth of industry in the North and the growing dependence on slavery and the production of cotton in the South.

**National Expansion and Reform: 1801 to 1861**

- 8.1.12** Interpret how the events surrounding the Louisiana Purchase (1803) and Lewis and Clark expedition (1803-1806) allowed for America’s initial push towards westward expansion.

- 
- 8.1.13** Explain the main issues, consequences, and landmark decisions of the Marshall Court.
- 8.1.14** Analyze the causes and consequences of the War of 1812.
- 8.1.15** Define nationalism and understand the direction nationalism gave to domestic and foreign policy and to the development of an industrial economy during this period.
- 8.1.16** Identify the key ideas of Jacksonian democracy and explain their influence on political participation, political parties and constitutional government; analyze Jackson’s actions as President such as the destruction of the National Bank, the nullification crisis, and Jackson’s Indian policy.
- 8.1.17** Explain relationships and conflict between settlers and Native Americans on the frontier.
- 8.1.18** Describe the causes, courses, challenges, compromises, and consequences associated with westward expansion, including the concept of Manifest Destiny.
- 8.1.19** Analyze the causes and effects of the Mexican War (1846-1848).
- 8.1.20** Give examples of how immigration affected American culture in the decades before and the Civil War, including growth of industrial sites in the North; religious differences; tensions between middle-class and working-class people, particularly in the Northeast; and intensification of cultural differences between the North and the South.
- 8.1.21** Give examples of the changing role of women, minorities, and immigrants in the northern, southern and western parts of the United States in the mid-nineteenth century, and examine possible causes for these changes.
- 8.1.22** Describe the abolitionist movement and identify figures and organizations involved in the debate over slavery, including leaders of the Underground Railroad
- 8.1.23** Analyze the influence of early individual social reformers and movements such as the abolitionist, feminist and social reform movements.

### **The Civil War and Reconstruction Period: 1850 to 1877**

- 8.1.24** Analyze the causes and effects of events leading to the Civil War, and evaluate the impact issues such as states’ rights and slavery had in developing America’s sectional conflict.
- 8.1.25** Identify factors and individuals which influenced the outcome of Civil War and explain the significance of each.
- 8.1.26** Compare and contrast the three plans for Reconstruction and evaluate the merits of each.
- 8.1.27** Describe causes and lasting effects of the Civil War and Reconstruction as well as the political controversies surrounding this time such as Andrew Johnson’s impeachment, the Black Codes, and the Compromise of 1877.

### **Chronological Thinking, Historical Comprehension, Analysis and Interpretation, Research, and Issues-Analysis and Decision-Making**

- 
- 8.1.28** Recognize historical perspective and evaluate alternative courses of action by describing the historical context in which events unfolded.
- 8.1.29** Differentiate between facts and historical interpretations of events, recognizing that the historian’s narrative reflects his or her judgment about the significance of particular facts.
- 8.1.30** Using primary and secondary sources, analyze an issue confronting the United States from colonial times through the Reconstruction period.
- 8.1.31** Compare and contrast examples of art, music, literature, and other forms of expression; explain how these reflect American culture during this time period.

## **Standard 2 Civics and Government**

### **Foundations of Government**

- 8.2.1** Identify and explain essential ideas of constitutional government, which include limited government; rule of law; due process of law; separated and shared powers; checks and balances; federalism; popular sovereignty; republicanism; representative government; and individual rights to life, liberty and property; and freedom of conscience.
- 8.2.2** Explain the concept of a separation of powers and how and why these powers are distributed, shared and limited in the constitutional government of the United States.
- 8.2.3** Examine ways that the national government affects the everyday lives of people of the United States.

### **Functions of Government**

- 8.2.4** Compare and contrast the delegated, reserved, and concurrent powers (division of power or federal system) contained in the United States Constitution.
- 8.2.5** Compare and contrast the different functions of national and state government within the federal system by analyzing the United States Constitution and the Indiana Constitution.

### **Roles of Citizens**

- 8.2.6** Recognize and explain the relationship between the rights and responsibilities of citizenship in the United States.
- 8.2.7** Explain the importance of responsible participation by citizens in voluntary civil organizations to bring about social reform.
- 8.2.8** Explain ways that citizens can participate in the election process (political parties, campaigns and elections) at the national, state, and local levels.
- 8.2.9** Explain how citizens can monitor and influence the development and implementation of public policies at local, state and national levels of government.
- 8.2.10** Research and defend positions on issues in which fundamental values and principles related to the United States Constitution are in conflict such as: 1<sup>st</sup> and 2<sup>nd</sup> Amendment rights, the right to privacy, and the rights of the individual.

## **Standard 3 Geography**

### **The World in Spatial Terms**

- 8.3.1** Read maps to interpret symbols and determine the land forms and human features that represent physical and cultural characteristics of regions in the United States.

### **Places and Regions**

- 8.3.2** Read and interpret maps that portray the physical growth and development of the United States from colonization through Reconstruction (1877).

### **Physical Systems**

---

8.3.3 Identify and locate the major climate regions in the United States and describe characteristics of regions.

8.3.4 Identify the major mountain ranges and river systems of the United States and explain the importance of these physical features in the development of America.

#### Human Systems

8.3.5 Identify the agricultural regions of the United States and be able to give explanations for how the land was used and developed during the growth of the United States.

8.3.6 Using maps identify changes influenced by growth, economic development and human migration in the United States.

8.3.7 Using primary and secondary sources, identify ways people modified the physical environment as the United States developed and describe the impacts that resulted.

8.3.8 Analyze human and physical factors that have influenced migration and settlement patterns and relate them to the economic development of the United States.

8.3.9 Identify and interpret maps, graphs and charts showing the distribution of natural resources such as forests, water sources and wildlife in the US at the beginning of the nineteenth century and give examples of how people exploited resources as the country became industrialized and people moved westward.

### Standard 4 Economics

8.4.1 Identify economic factors contributing to European exploration and colonization in North America, the American Revolution and the drafting of the Constitution of the United States.

8.4.2 Identify and explain the four types of economic systems (traditional, command, market, and mixed); evaluate how the characteristics of a market economy have affected the economic and labor development of the United States.

- \* **traditional economy:** an economy in which resources are allocated based on custom and tradition

- \* **command economy:** an economy in which resources are allocated by the government or other central authority

- \* **market economy:** an economy in which resources are allocated by decisions of individuals and businesses

- \* **mixed economy:** an economic system combining private and public enterprise

8.4.3 Explain how federal, state, and local governments are involved in the economy of the United States.

8.4.4 Analyze contributions of entrepreneurs and inventors in the development of the United States economy to 1877.

8.4.5 Relate how new technology and inventions brought about changes in labor productivity in the United States in the eighteenth and nineteenth centuries.

8.4.6 Trace the development of different kinds of money used in the United States.

8.4.7 Trace the development of the banking system in the United States.

8.4.8 Explain and evaluate examples of domestic and international interdependence in United States history.

8.4.9 Examine the importance of borrowing and lending (the use of credit) in the United States economy and list the advantages and disadvantages of using credit.

8.4.10 Compare and contrast job skills needed in different time periods in United States history.



**ALLEGIANT PREP**  
ACADEMY

# Attachment 6

School Calendar and Schedule

## Attachment 6: School Calendar and Schedule

Attachment 6: Provide the school’s calendar for the first year of operation, as well as the weekly schedule of classes. Provide an overview of academic and non-academic programs, as well as the total number of instructional days in an academic year. Note the length of the school day, including start and dismissal times. Detail the number of instructional hours/minutes in the day for core subjects such as language arts, mathematics, science, and social studies. *Note: Limit to attachment is ten (10) pages.*

---

**2018-2019 Annual Calendar.** Our calendar will operate on a trimester schedule and students will be provided 184 days of rigorous and focused instruction. The first day of school for students is July 30, 2018 and the last day of school is May 31, 2019. The first week of school will acclimate students to the Allegiant Prep way, and students will be dismissed at 12:00PM. Allegiant Prep will follow the Indianapolis Public Schools Calendar as a guide for school holiday and vacations, including Fall Break in October, Thanksgiving, Winter Break in December, and Spring Break in March. We will also close for the following holidays: Labor Day, Martin Luther King Jr. Day, President’s Day, and Memorial Day.

The Allegiant Prep calendar includes the following key components to ensure students meet end of year academic goals and are on track to be accepted and graduate from a 4-year college.

- **Extended School Day and Year.** We provide an extended school year of 184 days and an extended school day of 8 hours (instructional time 8:00am-4:00pm). Monday-Thursday students receive 400 minutes of academic instruction and 300 minutes of instruction on Friday, our abbreviated day allowing for weekly Professional Development.
- **Assessments.** Major assessments (STEP, NWEA-MAP, Interim Assessments) are strategically placed on the calendar to ensure effective cycles of data analysis. The STEP assessment is given four times per year, NWEA-MAP three times per year, and interim assessments (our unit assessments) every 6-8 weeks. There are four Data Days, Professional Development days dedicated to strategically analyze data to inform instruction and student groupings following assessments. In 2018-2019, we prioritize Data Days for the analysis of the STEP and NWEA-Map assessment, and will use Friday PD time for analysis of Interim Assessments.
- **Professional Development.** Allegiant Prep dedicates 24 full days to staff professional development. The year begins with a 15-day Summer Professional Development, ensuring that teachers are equipped with both content and classroom management techniques so that they are able to execute in the “Allegiant Prep” way beginning on the first day of school. In addition, there are 9 Professional Development Days during the school year. Four are Data Day’s following major assessments, the remaining five days are focused on curriculum, instruction, and school culture.
- **Parent Involvement.** Our students’ families have multiple opportunities to be active participants in their students learning and progress towards goals during the year. The annual calendar highlights 3 distinct opportunities: **Family Orientation** prior to the start of the school year where students and families are invited to meet classroom teachers and staff, **University Nights** six times per year where families are provided strategies for helping students at home, **Parent Teacher Conference Nights** where students and families discuss student progress in school and current academic levels with classroom teachers, **Donuts and Coffee** with the Head of School on eight Saturday’s during the year where families have the opportunity to be informed on what students are learning in class and engage with and provide feedback to the Head of School on our program.

Our draft annual calendar for the 2018-2019 school year can be found in **Figure 6.1**.



Figure 6.1: 2018-2019 Annual Calendar

Allegiant Preparatory Academy 2018-2019 Academic Calendar																																																																																																									
<b>July 2018</b> <table border="1"> <tr><th>Sun</th><th>Mon</th><th>Tues</th><th>Wed</th><th>Thurs</th><th>Fri</th><th>Sat</th></tr> <tr><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td></tr> <tr><td>8</td><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td></tr> <tr><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td></tr> <tr><td>22</td><td>23</td><td>24</td><td>25</td><td>26</td><td>27</td><td>28</td></tr> <tr><td>29</td><td>30</td><td>31</td><td></td><td></td><td></td><td></td></tr> </table>							Sun	Mon	Tues	Wed	Thurs	Fri	Sat	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					<b>August 2018</b> <table border="1"> <tr><th>Sun</th><th>Mon</th><th>Tues</th><th>Wed</th><th>Thurs</th><th>Fri</th><th>Sat</th></tr> <tr><td></td><td></td><td></td><td>1</td><td>2</td><td>3</td><td>4</td></tr> <tr><td>5</td><td>6</td><td>7</td><td>8</td><td>9</td><td>10</td><td>11</td></tr> <tr><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td></tr> <tr><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td><td>24</td><td>25</td></tr> <tr><td>26</td><td>27</td><td>28</td><td>29</td><td>30</td><td>31</td><td></td></tr> </table>							Sun	Mon	Tues	Wed	Thurs	Fri	Sat				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		<b>Instructional Days: 184</b> <b>Professional Development Days: 24</b>							
Sun	Mon	Tues	Wed	Thurs	Fri	Sat																																																																																																			
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																																																																																																							
Sun	Mon	Tues	Wed	Thurs	Fri	Sat																																																																																																			
			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																																																																																																				
<b>September 2018</b> <table border="1"> <tr><th>Sun</th><th>Mon</th><th>Tues</th><th>Wed</th><th>Thurs</th><th>Fri</th><th>Sat</th></tr> <tr><td></td><td></td><td></td><td></td><td></td><td></td><td>1</td></tr> <tr><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td></tr> <tr><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td></tr> <tr><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td></tr> <tr><td>23</td><td>24</td><td>25</td><td>26</td><td>27</td><td>28</td><td>29</td></tr> <tr><td>30</td><td></td><td></td><td></td><td></td><td></td><td></td></tr> </table>							Sun	Mon	Tues	Wed	Thurs	Fri	Sat							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							<b>October 2018</b> <table border="1"> <tr><th>Sun</th><th>Mon</th><th>Tues</th><th>Wed</th><th>Thurs</th><th>Fri</th><th>Sat</th></tr> <tr><td></td><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td></tr> <tr><td>7</td><td>8</td><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td></tr> <tr><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td></tr> <tr><td>21</td><td>22</td><td>23</td><td>24</td><td>25</td><td>26</td><td>27</td></tr> <tr><td>28</td><td>29</td><td>30</td><td>31</td><td></td><td></td><td></td></tr> </table>							Sun	Mon	Tues	Wed	Thurs	Fri	Sat		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				<b>Key:</b> <b>Professional Development (Staff Only)</b> <b>Parent Nights/Parent Conferences</b> <b>Students First / Last Day of School</b> <b>12:00pm Dismissal</b> <b>NWEA Map Testing</b> <b>Holiday Vacation (No School)</b> <b>Interim Assessments</b> <b>Staff Data Day (Staff Only)</b> <b>STEP Assessment</b> <b>Donuts and Coffee with APA</b>
Sun	Mon	Tues	Wed	Thurs	Fri	Sat																																																																																																			
						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																																																																																																									
Sun	Mon	Tues	Wed	Thurs	Fri	Sat																																																																																																			
	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																																																																																																						
<b>November 2018</b> <table border="1"> <tr><th>Sun</th><th>Mon</th><th>Tues</th><th>Wed</th><th>Thurs</th><th>Fri</th><th>Sat</th></tr> <tr><td></td><td></td><td></td><td></td><td></td><td>1</td><td>2</td></tr> <tr><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td><td>9</td></tr> <tr><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td></tr> <tr><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td></tr> <tr><td>24</td><td>25</td><td>26</td><td>27</td><td>28</td><td>29</td><td>30</td></tr> </table>							Sun	Mon	Tues	Wed	Thurs	Fri	Sat						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	<b>December 2018</b> <table border="1"> <tr><th>Sun</th><th>Mon</th><th>Tues</th><th>Wed</th><th>Thurs</th><th>Fri</th><th>Sat</th></tr> <tr><td></td><td></td><td></td><td></td><td></td><td></td><td>1</td></tr> <tr><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td></tr> <tr><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td></tr> <tr><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td></tr> <tr><td>23</td><td>24</td><td>25</td><td>26</td><td>27</td><td>28</td><td>29</td></tr> <tr><td>30</td><td>31</td><td></td><td></td><td></td><td></td><td></td></tr> </table>							Sun	Mon	Tues	Wed	Thurs	Fri	Sat							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						<b>Important Dates:</b> July 9-27: Summer PD for Staff Only July 29 & 26: Family Orientation July 30: First Day of School Aug. 6-10: Round 1 STEP Assessment Aug. 13-17: NWEA MAP Testing Aug. 23: Open House Aug. 24: Data Day PD (No Students) Sept. 3: Labor Day Sept. 18-19: Interim Assessments Sept. 21: Staff Data Day (No Students) Oct. 1-5: Fall Break Oct. 8: PD for Staff Only Nov. 5-9: Round 2 STEP Assessment Nov. 13-14: Interim Assessments Nov 14: End of Trimester 1 Nov. 15: Parent Teacher Conference Nov. 16: Staff Data Day (No Students) Nov. 21-23: Thanksgiving Break Dec. 5-7: NWEA MAP Testing Dec. 17- Jan. 1: Winter Break Jan. 2: PD for Staff Only Jan. 15-16: Interim Assessment Jan. 21: MLK Day, No School Feb. 4-8: Round 3 STEP Assessment Feb. 15: Staff Data Day (No Students) Feb. 18: Presidents Day, No School Mar. 4-5: Interim Assessment Mar. 6: End of Trimester 2 Mar. 7: Parent Teacher Conference Mar. 25-29: Spring Break Apr. 1: PD for Staff Only Apr 29-May 3: Round 4 STEP Assessment May 7-8: Interim Assessment May 15-17: NWEA MAP Testing May 27: Memorial Day, No Students May 31: Last Day for Students June 3-4: PD for Staff Only
Sun	Mon	Tues	Wed	Thurs	Fri	Sat																																																																																																			
					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																																																																																																			
Sun	Mon	Tues	Wed	Thurs	Fri	Sat																																																																																																			
						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																																																																																																								
<b>January 2019</b> <table border="1"> <tr><th>Sun</th><th>Mon</th><th>Tues</th><th>Wed</th><th>Thurs</th><th>Fri</th><th>Sat</th></tr> <tr><td></td><td></td><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td></tr> <tr><td>6</td><td>7</td><td>8</td><td>9</td><td>10</td><td>11</td><td>12</td></tr> <tr><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td></tr> <tr><td>20</td><td>21</td><td>22</td><td>23</td><td>24</td><td>25</td><td>26</td></tr> <tr><td>27</td><td>28</td><td>29</td><td>30</td><td>31</td><td></td><td></td></tr> </table>							Sun	Mon	Tues	Wed	Thurs	Fri	Sat			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			<b>February 2019</b> <table border="1"> <tr><th>Sun</th><th>Mon</th><th>Tues</th><th>Wed</th><th>Thurs</th><th>Fri</th><th>Sat</th></tr> <tr><td></td><td></td><td></td><td></td><td></td><td></td><td>1</td></tr> <tr><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td></tr> <tr><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td></tr> <tr><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td></tr> <tr><td>23</td><td>24</td><td>25</td><td>26</td><td>27</td><td>28</td><td>29</td></tr> <tr><td>30</td><td>31</td><td></td><td></td><td></td><td></td><td></td></tr> </table>							Sun	Mon	Tues	Wed	Thurs	Fri	Sat							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						<b>Instructional Days: 22/ PD: 1</b>
Sun	Mon	Tues	Wed	Thurs	Fri	Sat																																																																																																			
		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																																																																																																					
Sun	Mon	Tues	Wed	Thurs	Fri	Sat																																																																																																			
						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																																																																																																								
<b>March 2019</b> <table border="1"> <tr><th>Sun</th><th>Mon</th><th>Tues</th><th>Wed</th><th>Thurs</th><th>Fri</th><th>Sat</th></tr> <tr><td></td><td></td><td></td><td></td><td></td><td></td><td>1</td></tr> <tr><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td></tr> <tr><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td></tr> <tr><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td></tr> <tr><td>23</td><td>24</td><td>25</td><td>26</td><td>27</td><td>28</td><td>29</td></tr> <tr><td>30</td><td>31</td><td></td><td></td><td></td><td></td><td></td></tr> </table>							Sun	Mon	Tues	Wed	Thurs	Fri	Sat							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						<b>April 2019</b> <table border="1"> <tr><th>Sun</th><th>Mon</th><th>Tues</th><th>Wed</th><th>Thurs</th><th>Fri</th><th>Sat</th></tr> <tr><td></td><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td></tr> <tr><td>7</td><td>8</td><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td></tr> <tr><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td></tr> <tr><td>21</td><td>22</td><td>23</td><td>24</td><td>25</td><td>26</td><td>27</td></tr> <tr><td>28</td><td>29</td><td>30</td><td></td><td></td><td></td><td></td></tr> </table>							Sun	Mon	Tues	Wed	Thurs	Fri	Sat		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					<b>Instructional Days: 16/ PD: 0</b>
Sun	Mon	Tues	Wed	Thurs	Fri	Sat																																																																																																			
						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																																																																																																								
Sun	Mon	Tues	Wed	Thurs	Fri	Sat																																																																																																			
	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																																																																																																							
<b>May 2019</b> <table border="1"> <tr><th>Sun</th><th>Mon</th><th>Tues</th><th>Wed</th><th>Thurs</th><th>Fri</th><th>Sat</th></tr> <tr><td></td><td></td><td></td><td>1</td><td>2</td><td>3</td><td>4</td></tr> <tr><td>5</td><td>6</td><td>7</td><td>8</td><td>9</td><td>10</td><td>11</td></tr> <tr><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td></tr> <tr><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td><td>24</td><td>25</td></tr> <tr><td>26</td><td>27</td><td>28</td><td>29</td><td>30</td><td>31</td><td></td></tr> </table>							Sun	Mon	Tues	Wed	Thurs	Fri	Sat				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		<b>June 2019</b> <table border="1"> <tr><th>Sun</th><th>Mon</th><th>Tues</th><th>Wed</th><th>Thurs</th><th>Fri</th><th>Sat</th></tr> <tr><td></td><td></td><td></td><td></td><td></td><td></td><td>1</td></tr> <tr><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td></tr> <tr><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td></tr> <tr><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td></tr> <tr><td>23</td><td>24</td><td>25</td><td>26</td><td>27</td><td>28</td><td>29</td></tr> <tr><td>30</td><td></td><td></td><td></td><td></td><td></td><td></td></tr> </table>							Sun	Mon	Tues	Wed	Thurs	Fri	Sat							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							<b>Instructional Days: 22/ PD: 0</b>
Sun	Mon	Tues	Wed	Thurs	Fri	Sat																																																																																																			
			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																																																																																																				
Sun	Mon	Tues	Wed	Thurs	Fri	Sat																																																																																																			
						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																																																																																																									
<b>June 2019</b> <table border="1"> <tr><th>Sun</th><th>Mon</th><th>Tues</th><th>Wed</th><th>Thurs</th><th>Fri</th><th>Sat</th></tr> <tr><td></td><td></td><td></td><td></td><td></td><td></td><td>1</td></tr> <tr><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td></tr> <tr><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td></tr> <tr><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td></tr> <tr><td>23</td><td>24</td><td>25</td><td>26</td><td>27</td><td>28</td><td>29</td></tr> <tr><td>30</td><td></td><td></td><td></td><td></td><td></td><td></td></tr> </table>							Sun	Mon	Tues	Wed	Thurs	Fri	Sat							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							<b>Instructional Days: 0/ PD: 2</b>																																																	
Sun	Mon	Tues	Wed	Thurs	Fri	Sat																																																																																																			
						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																																																																																																									

**Schedule of Classes.** Our school day schedule provides teachers with the defined structure to optimize student learning during the day. At Allegiant Prep instructional time is sacred. Our daily, weekly, and

yearly schedules will address the needs of students on the Westside through; a college preparatory curriculum that pulls from best practices of high performing schools across the country. With these elements in mind we have created a calendar that dedicates a substantial amount of time to equip students with the academic, character, and social skillsets to prepare for success in Advanced Placement courses in High School. The educational foundation Allegiant Prep students receive will prepare them for success in a 4-year college and to live a life of positive action.

**Sample K-8 Daily Schedules.** Allegiant Prep provides students with a horizontal grade-level and vertically aligned education as they matriculate from our Lower Academy (K-4) to our Upper Academy (5-8). The structure of the daily schedule inside of our annual calendar allows us to be thoughtful and intentional in our planning, but also responsive to student data that informs how we group, and remediate students who need extra support. Our doors open for breakfast at 7:30am, students arrive by 7:56am, and the day concludes at 4:00pm (Friday at 2:00pm).

**Lower Academy (K-4):** Our goal in the Lower Academy (K-4) is to have 100% of our students reading at or above grade-level by the end of third grade. Students will matriculate to fourth grade ready to make the switch from learning to read to reading to learn. Each K-4 classroom has three 30-minute small group literacy rotations daily. During this time two fully certified teachers work with students in small groups to develop foundational literacy skills unique to each individual student. In each grade there are two cohorts of students. One cohort will begin the day with literacy, and the other with mathematics, ensuring the shared reading teacher is able to support during each literacy rotation. During literacy rotations students work in groups of ten (10) and will move through three stations: two teacher led, and one blended learning station on computers. This structure allows for small group, data-driven reading instruction as well as leveled independent practice.

The schedule incorporates morning message, recess, electives (Art and PE), and closing circle during the week to give students strategic breaks, and community building time. These daily activities give students a positive outlet to move and engage in structured, joyful activities outside of the classroom. Additionally, all classes incorporate joyful chants when celebrating students, increasing class energy and productivity.

Monday-Thursday students have a 30-minute elective block and a 40-minute tutoring block. On alternating days, students will take both Art and Physical Education during their elective class, and will work on targeted skills with teacher interventions during the tutoring class. Students that have mastered foundational skills and have completed their life work will have an opportunity to self-identify extension learning activities (computer adaptive learning, independent reading, writing extension activities, brain games etc.).

On Fridays, students begin the day with Community Circle, and then engage in both Literacy rotations, Grammar and Writing, and Mathematics.

**Figure 6.2** is a sample Lower Academy Weekly Schedule.

<b>Figure 6.2: Sample Kindergarten Weekly Schedule</b>			
<b>Monday-Thursday</b>		<b>Friday</b>	
Time	Class	Time	Class
7:30-8:00	Arrival, Breakfast, Morning Routines	7:30-8:00	Arrival, Breakfast, Morning Routines
8:00-8:10	Morning Meeting	8:00-8:20	Community Circle
8:10-8:40	Read Aloud	8:20-8:50	Read Aloud
8:40-9:10	Literacy Rotation 1	8:50-9:20	Literacy Rotation 1
9:10-9:25	Snack /Restroom Break	9:20-9:35	Snack/ Restroom Break
9:25-9:55	Literacy Rotation 2	9:35-10:05	Literacy Rotation 2
9:55-10:25	Literacy Rotation 3	10:05-10:35	Literacy Rotation 3
10:25-11:15	Grammar and Writing	10:35-11:25	Grammar and Writing
11:15-11:45	Lunch/Restroom	11:25-11:55	Lunch/Restroom
11:45-12:05	Recess	11:55-12:50	Calendar Math/CGI
12:05-12:55	Calendar Math/CGI	12:50-1:50	Math
12:55-1:55	Math	1:50-1:55	Closing Circle
1:55-2:35	Science/Social Studies	1:55-2:00	Pack-Up, Dismissal
2:35-3:05	Electives	<b>Staff Professional Development</b>	
3:05-3:45	Daily Tutoring		
3:45-3:55	Closing Circle		
3:55-4:00	Pack-Up, Dismissal		
<b>Daily Instructional Minutes</b>			
<b>Literacy</b>	200 Minutes	<b>Math</b>	110 Minutes

**Upper Academy (5-8):** Our goal in the Upper Academy (5-8) is to ensure all students are prepared with the academic skills and habits necessary for success in a college preparatory high school. To that end, our daily schedule changes to a more standard middle school arrangement, with content teachers for each subject area. This allows for teachers to plan in their area of expertise and deliver high quality instruction in the areas of mathematics, humanities, science, and social studies.

The schedule incorporates morning homeroom, 100 minutes each of humanities and math, 50 minutes each of science and social studies daily. Monday through Thursday, students will also have a 30-minute Book Club, a 45-minute tutoring block, and a 50-minute elective class (Technology and Physical Education).

On Fridays, students begin the day with Community Circle which supports with school culture building and celebration of students who demonstrate our core values. **Figure 6.3** is a sample Upper Academy Daily Schedule.

<b>Figure 6.3: Sample Upper Academy Weekly Schedule</b>			
<b>Monday-Thursday</b>		<b>Friday</b>	
Time	Class	Time	Class
7:30-8:00	Arrival, Breakfast, Morning Routines	7:30-8:00	Arrival, Breakfast, Morning Routines
8:00-8:10	Homeroom	8:00-8:20	Community Circle <sup>1</sup>
8:10-9:50	Humanities (Reading and Writing)	8:20-10:00	Humanities (Reading and Writing)
9:50-10:00	Restroom Break	10:00-10:10	Restroom Break
10:00-11:40	Math	10:10-11:50	Math

<sup>1</sup> Community Circle will take place on different days for each Academy. This will be reflected in the final schedule.

11:40-12:30	Electives	11:50-12:15	Lunch
12:30-1:00	Lunch	12:15-1:05	Science
1:00-1:30	Book Club	1:05-1:55	Social Studies
1:30-2:20	Science	1:55-2:00	Dismissal
2:20-3:10	Social Studies	<b>Staff Professional Development</b>	
3:10-3:55	Tutoring		
3:55-4:00	Dismissal		
<b>Daily Instructional Minutes – Core Content Classes</b>			
<b>Literacy</b>	100 minutes	<b>Math</b>	100 minutes
<b>Science</b>	50 minutes	<b>Social Studies</b>	50 minutes

**Overview of Academic and Non-Academic Programs.**

**Allegiant Prep Lower Academy Literacy program (K-4).** Our literacy program is designed to ensure all students are reading at or above grade level when they enter third grade. In addition to knowing how to read, students will develop a love for literacy that is cultivated in our Lower Academy through celebrating students reading growth and creating parallels between text read in school and their lives and experiences outside of school. Monday through Friday our K-4 students engage in 200 minutes of literacy daily, with three 30-minute differentiated small group literacy rotations. In addition to small group literacy rotations we will utilize the following instructional mechanisms: Morning Meeting, Read Aloud, Phonics instruction, Blended Learning, Vocabulary development, Guided Reading, Reading Comprehension, Habits of Discussion, and Grammar and Writing. Our third and fourth grade students will start to spend more time utilizing schema, text-evidence, and background knowledge to engage in dialogue that pushes them to demonstrate a deep understanding of text read in class. **Figure 6.4** details the K-4 Literacy program.

<b>Figure 6.4: Lower Academy Proposed Literacy Program</b>			
<b>Component</b>	<b>Group</b>	<b>Curriculum and Description</b>	<b>Skills</b>
Read Aloud	Whole group	Read Aloud is one of the most important activities for students to build skills necessary to start reading. <sup>2</sup> Teacher created lesson plans are used to read at or above grade-level text to students; the teacher and student share the responsibility of thinking about and answering questions. <sup>3</sup> Read Aloud objective is to reinforce a specific academic skill (ex. Setting, Identifying characters, or text to self-connections, etc.) Teachers use "Think Alouds" to model the metacognitive process needed to comprehend the text. Students benefit from hearing the teacher model reading fluency and expressive reading. Teachers use targeted questions, call/response, joy, and fluctuation in tone for engagement. Teacher will select books based on: vocabulary words, content, culturally diversity and responsive content.	Print concepts, vocabulary development, fluency, comprehension
Phonics/ Phonemic Awareness/ Fluency	Small Group	Phonemic awareness and learning letter sounds is the foundation for students learning how to read. We use Reading Mastery, a research-proven program to ensure all students develop phonemic awareness. Letter sounds are taught explicitly through direct instruction. Student have multiple attempts to practice and internalize letter names and sounds. As	Phonemic awareness, phonics

<sup>2</sup> Routman, R. (2000). *Conversations: Strategies for teaching, learning and evaluating*. Portsmouth, NH: Heineman.

<sup>3</sup> Fountas, Irene C., and G. Pinell. (2006). *Teaching for Comprehending and Fluency: Thinking, Talking, and Writing about Reading, K-8*. Portsmouth, NH: Heinemann.

		student progress through lessons they begin to start saying entire words, then reading entire stories.	
Blended Learning	Individual	We will use a computer-based adaptive literacy program such as Lexia to provide students with individualized standards-aligned scaffolded practice.	Comprehension
Word Study	Small group	Students study rhyming words and other word relationships. At Allegiant Prep students learn to identify and spell sight words, based upon the Dolche sight words. <sup>4</sup>	Phonics, vocabulary
Guided Reading/ Reading Comprehension	Small group	Students get the most direct practice with reading during Guided Reading and Reading Comprehension. In small groups, students learn how to track words and understand punctuation, develop reading fluency, and basic comprehension skills. Teacher use STEP data to homogeneously group students based on reading levels, groups may adjust every 6-8 weeks. These groups receive individualized instruction focused on specific skills needed to grow reading levels. The teacher leads students in a mini-lesson on a discrete reading skill, then gives the group an opportunity to practice skill with their text. Each week students will have direct reading comprehension lessons in their group as well as guided reading lessons.	Print concepts, vocabulary, fluency, comprehension, and speaking & listening
Vocabulary	Whole class and small group	Students living in poverty are more likely to enter school with less extensively developed vocabulary than their affluent peers. <sup>5</sup> One compelling finding is the connection between vocabulary knowledge and comprehension in reading research. <sup>6</sup> We incorporate new vocabulary words throughout the day in a number of ways: vocabulary words from daily Read Aloud book, previewing vocabulary words before Guided Reading and Reading Comprehension, having classroom vocabulary wall for Read Aloud, Science, Social Studies, and Math. Teachers constantly use Tier 2 language and hold students accountable for using academic vocabulary in discussion and speaking in complete sentences.	Vocabulary
Writing	Whole class and small group	All students receive explicit writing instruction each day, which is based on the Lucy Calkins writing curriculum. Students transition from telling stories through pictures and words in Kindergarten to using complete sentences and paragraphs by second grade. A 20-minute daily grammar lesson is taught prior to the writing lesson the objective (i.e. identifying: Nouns, Verbs, etc.) is aligned to Indiana State Standards.	Print concepts, phonics

<sup>4</sup> <http://www.dolchesightwords.org/>

<sup>5</sup> Hart, Betty, and T. Risley. "The Early Catastrophe: The 30 Million Word Gap by Age 3." *American Educator*. 2003.

<sup>6</sup> Lefh, Fran, and Jean Osborn, "A Focus on Comprehension" Pacific Resources for Education and Learning, 2005.

Academic Discussion	Whole class and small group	Allegiant Prep students will develop the academic, social, and character skills to graduate from college and live a life of positive action. To build a foundation that will support college and life success; students must have multiple opportunities to engage in a variety of substance based, and structured conversations. Allegiant Prep will adopt North Star’s Habit of Discussion framework to sequentially provide students with a framework to support developing students’ ability respectfully engage in conversations in and outside of school.	
Informational Text	Whole and small group	Informational text will be strategically incorporated in to Science, Social Studies, Read Aloud, and Guided Reading. During these times teachers focus on building students vocabulary, background knowledge, and non-fiction literacy skills.	Vocabulary, comprehension

**Allegiant Prep Upper Academy Literacy program (5-8).** Allegiant Prep students will enter our Upper Academy with a solid literacy foundation that will allow them to be successful and master rigorous content that will prepare them for success in High School and College. During the week students will engage in different Text Genres, Written and Verbal Text Analysis, Writing Development, Student led Text Discussions, and school wide Book Clubs. **Figure 6.5** outlines our Upper Academy curriculum materials.

<b>Figure 6.5: Upper Academy Proposed Literacy Program</b>		
<b>Component</b>	<b>Group</b>	<b>Curriculum and Description</b>
Book clubs	Small group	Students engage in 30-minute book clubs each day, Monday through Thursday, where students lead text driven conversations facilitated by a teacher. We use the Junior Great Books series, and other seminal young adult novels, such as The Outsiders.
Reading	Whole and small group	Reading instruction evolves into seminar discussions aligned to novels read in class. Students read a variety of genres to prepare for high school level textual analysis and discourse. Explicit skills necessary for textual analysis, such as using text evidence to support responses are taught through reading complex, grade-level texts. Writing assignments are aligned to classroom text to practice critical analysis skills.
Writing & Grammar	Whole and small group	In the Upper Academy students move from working on multi-paragraph essays, in 5 <sup>th</sup> grade, to longer, more complex essays in eighth grade. Students practice a variety of state aligned writing standards including expository, persuasive, comparing and contrasting, and narrative. Grammar, spelling and punctuation are incorporated into the writing block. Students work independently and with peers to master the writing process. Students self-evaluate writing using the Allegiant Prep rubric, which is aligned to high school writing standards.
Language/ Speech	Whole group	5 <sup>th</sup> & 6 <sup>th</sup> : Word study and sentence mapping, introduction to Habits of Discussion 7 <sup>th</sup> : Habits of Discussion and debate (guarding and defending positions on text read) 8 <sup>th</sup> : Socratic seminars
8 <sup>th</sup> Grade Thesis	Independent w/Teacher	2 <sup>nd</sup> semester of 8 <sup>th</sup> grade, students work on culminating thesis project, supported by teacher via classroom conferences and individual student check-ins. Each student selects a topic, creates a scope and sequence of research to be completed during the semester. The student deliverable

		will be a paper they must defend orally in front of peers, teachers, and a panel of school and community leaders.
--	--	---

**Mathematics Program.** Allegiant Prep will utilize researched-based curriculum that is proven to yield significant student achievement results. K-4 students will receive 110 minutes of Math instruction daily, and students in grades 5-8 will receive 100 minutes of math instruction daily. Daily Math lesson plans will be aligned with Indiana Academic Standards, all assessments will be aligned with grade appropriate standards. In K-4 Math is distinguished by 3 sections: Calendar Math (Number sense and fluency), CGI (Cognitively Guided Instruction), and Problem Solving (application), 5-8 students have 2 sections in a combined 100-minute class: Foundations (number sense and computation) and Problem Solving (application). Students will take 8<sup>th</sup> Algebra I in 8<sup>th</sup> grade. Allegiant Prep students will matriculate to High School ready to successfully take advanced mathematics courses (Algebra II, Geometry, Trigonometry/Pre-Calculus, and Calculus). Our math curriculum is outlined below in **Figure 6.6**.

<b>Figure 6.6: Description of Dual Mathematics Curriculum</b>
<p><b>Calendar Math.</b> Allegiant Prep students in K-2 start Math each day with <i>Everyday Counts Calendar Math</i>, which provides students with practice in concepts focused on number sense, place value, time, money, mental math, geometry, estimation, patterns graphing, and statistics and algebra.<sup>7</sup> Students are engaged by the Calendar Math program which also incorporates the days and date, and uses the calendar to calculate what the date was before or what the date will be after today. An example of a question a teacher may ask is, "Today's date is Wednesday, October 5<sup>th</sup> 2016. What will the date be 7 days from now?" Calendar Math is research-based, and utilized at high performing charter schools across the country.<sup>8</sup></p>
<p><b>Cognitively Guided Instruction (CGI).</b> Cognitively Guided Instruction (CGI) builds on students' natural problem-solving skills. CGI allows teachers to understand the logic and strategies students are using to guide them towards mathematical understanding. Students complete a daily logic problem in the following way: (1) Repeat the problem. At least 3 students would be asked to stand up and re-tell the problem in their own words. (2) Identify what the problem is asking students to accomplish (i.e. addition, subtraction, multiplication, etc.). (3) Draw the problem. Using prior knowledge, students draw how they would solve the problem. (4) Solve the problem, teacher monitoring during individual work-time, at the end would select 3 students to present the strategy they used to solve the problem to the class (i.e. I drew 10 cubes to represent 10 cookies, Jane gave 3 to Tim and 4 to Kris so I crossed out 7 cubes, which left me with 3. Jane had 3 cookies left).</p>
<p><b>Math Computation.</b> Students learn the basic components of math computation in a focused directly taught format. The curriculum emphasizes learning clear steps, quality practice, and automaticity. Teachers use pre-planned focused curriculum such as Saxon Math to build their daily lessons. Examples of skills covered include memorizing basic addition, subtraction, division, and multiplication math facts, and learning long division, conversion of fractions, etc.</p>
<p><b>Math Workshop.</b> Math workshop will be led each day using the <i>Engage NY</i> curriculum. This curriculum integrates rigorous classroom reasoning, extended classroom time devoted to practice and reflection through extensive problem sets, and high expectations for mastery.<sup>9</sup> The Head of School will ensure an alignment between EngageNY and the Indiana Academic Standards, and will supplement as needed to meet state standards and benchmarks. Concepts and skills taught are organized into the same strand as the Indiana Academic Standards and strands are taught either in isolation or two at a time. Each subsequent unit builds</p>

<sup>7</sup> <http://www.greatsource.com/GreatSource/pdf/EveryDayCountsResearch206.pdf>.

<sup>8</sup> Schools using the program include North Star in Newark, Brooke Schools in Boston, and BES schools Cornerstone in Memphis and Great Lakes Academy in Chicago.

<sup>9</sup> <http://www.engageny.org/mathematics>

on student learnings from lessons in the previous unit. This alignment allows students to build a solid mathematical foundation that will allow them to make connections across strands as they matriculate from grade to grade. The *Engage NY* framework allows for teachers to differentiate in lesson plans which students they will work with during which specific times in the lesson. The *Engage NY* curriculum which combines building student foundational skills and teaching advanced strategies will allow all Allegiant Prep students to excel in Math.

**Blended Learning.** We will leverage computer-based adaptive math programming such as STmath to provide differentiated, standards-aligned scaffolded practice.

**Science.** In our Lower Academy we will primarily use the Core Knowledge curriculum for Science instruction. Science and Social Studies are taught on an alternating basis, one Science unit would be taught for three weeks, then a three week Social Studies unit. Each Science unit is aligned to state standards and will include opportunities for students to practice informational writing and comprehension strategies with nonfiction texts. In our Upper Academy we create standards-aligned curriculum that incorporates content with non-fiction and science laboratory skills. We will supplement our curriculum with research-based science materials, such as Full Options Science Systems (FOSS). Student will actively engage in projects and experiments aligned to specific Science objectives such as identifying specific elements of different simple machines. In addition to experiments students will also engage in an array of different scientific fields such as: the scientific method, and presenting findings to peers. Nonfiction reading and writing skills will continue to be incorporated into daily lessons to reinforce these critical literacy skills.

**Social Studies.** In our Lower Academy, we draw from the Core Knowledge curriculum to create our scope and sequence for lesson objectives for the week. Social Studies and Science are taught on a rotating basis, with a three-week Social Studies lesson followed by a three-week Science lesson. The Core Knowledge Curriculum focuses on building student background knowledge and vocabulary in History, Civics and Government, and Historical Figures to name a few. Core Knowledge includes knowledge a student should know at specific points within their academic development. Each lesson also incorporates informational writing and practice using comprehension strategies for nonfiction text. Our curriculum selection inspires and equips students to be active, engaged, and informed citizens. Teachers will execute lesson that are aligned to state standards and provide them with the flexibility to supplement to design engaging lessons that will build a strong foundation for Upper Academy History courses to be built upon. Upper Academy Social Studies courses will use internally created curriculum.

### **Additional Programs**

**Morning Message.** All students transition from desk to the classroom carpet, the Teacher will prompt the class to start their “college chant” and “good morning song”. After this, the Teacher and students read class letter with core value focus for the day. With support from teacher, students engage in conversation about the importance of the core value and what they can do to make sure they are demonstrating it during the day. Teachers will also use this time for quick focused practice on a specific literacy skill. Students finish Morning Message inspired and focused to work hard and make the right decisions during the course of the day.

**Electives.** Monday-Thursday students rotate from day to day between a 50-minute Art or PE class. In our Upper Academy, Art is replaced with a Technology course.

**Tutoring.** Students engage in small group or individual remediation, as well as begin lifework. During tutoring some students are engaged in direct work with teacher other students are working independently



on choice activities aligned to a specific skill they are still working to master (i.e. handwriting, independent reading, or word-sort, etc.)

**Community Circle.** Each grade level has a weekly community circle with their entire grade. During this time each cohort has the opportunity to lead their college chant. Teachers and school leadership also engage students in demonstrating academic skills learned in class (For example the Head of School might have First Grade solve a story problem in their head and identify specific students to share answers out to the group). In closing the Head of School (or Dean of Students) would celebrate individual students and cohorts that have been going above and beyond (This list would include student of the week, 100% Lifework completion, and attendance awards). Student(s) acknowledged during this time would be able to get a prize out of the treasure chest and take a picture (which would be featured on hallway bulletin boards and monthly family newsletters).

**Closing Circle (K-4).** At the end of each day students gather around the perimeter of the carpet in their classroom to discuss the core value of the day. Each student would have an opportunity to share if they believe the class did a good job of demonstrating the core value. During this time the Teacher facilitates dialogue with students to identify what went well and what needs to change the next day to ensure the class is meeting their goal.

**Snack/Movement Break.** During the restroom break students have the opportunity to eat their snack and get up and engage in: dancing, conversation with shoulder partner, or a whole class game. This scheduled break allows students to engage in less structured socialization before getting back to academic content.

**Character Development.** Our character development program is grounded in our school core values which students learn about during the first week of student orientation. During the course of the week these core values are reinforced during daily morning message, closing circle, and weekly community circles. The classroom behavior management system is aligned to core values in both our Lower and Upper Academies and students who make choices in alignment with our values will be rewarded, and those who do not will receive appropriate consequences. If a student is not demonstrating one of our core values their clip would be moved down.

**Service.** Students also develop a sense of servant leadership through annual Community Service projects. Each year students work on a community service project that is focused on addressing a need on the Westside. On community service days, all students, teachers and families (encouraged to attend) work together collectively to give back. As students matriculate they start to understand that they have a responsibility to give back and help to address inequities in their community. Allegiant Prep students will carry this mindset with them in High School, College, and upon graduation continue to seek out opportunities to make a positive impact in their communities and lives of others.



**ALLEGIANT PREP**  
ACADEMY

# Attachment 7

Enrollment Policy

**Attachment 7: Provide the school’s Enrollment Policy, which should include the following:**

- a. Any admission requirements, including an explanation of the purpose of any pre-admission activities for students or parents.
- b. Tentative dates for the application period, including enrollment deadlines and procedures, and an explanation of how the school will receive and process Intent to Enroll forms.
- c. Tentative lottery dates and procedures.
- d. Policies and procedures for student waiting lists, withdrawals, re-enrollment, and transfers.

**Enrollment Plan**

Allegiant Prep’s enrollment policy prohibits discriminations on the basis of disability, race, creed, color, gender, national origin, religion, ancestry or need for special education services. Every aspect of Allegiant Prep’s enrollment and recruitment practices will comply with Indiana State and federal standards.

Allegiant Prep Academy will open its doors in August of 2018 with 60 Kindergarten and 60 first grade students. Allegiant Prep will enroll an eligible student who submits a timely application, unless the number of applications exceeds the number of available seats per our program, class, grade level, or building capacity. Each subsequent year Allegiant Prep will add a grade until we reach full capacity as a K-8 school educating 540 students. **Figure 7.1** student enrollment through 2025.

Our structure of a Lower (K-4) and Upper Academy (5-8) will allow us to maintain a strong culture of expectations and achievement K-8.

Based upon the experience of similar schools, we anticipate an annual attrition rate of 7-10% and will backfill students in all grades in accordance with Indiana State law. As a school we will work to backfill all grade levels in order to educate and serve as many students as possible.

**Figure 7.1: Enrollment Plan**

	Grade	2017	2018	2019	2020	2021	2022	2023	2024	2025	
Lower Academy	K	Planning Year	60	60	60	60	60	60	60	60	
	1		60	60	60	60	60	60	60	60	
	2			60	60	60	60	60	60	60	
	3				60	60	60	60	60	60	
	4					60	60	60	60	60	
Upper Academy	5							60	60	60	60
	6								60	60	60
	7									60	60
	8										60
	<b>Total</b>		<b>0</b>	<b>120</b>	<b>180</b>	<b>240</b>	<b>300</b>	<b>360</b>	<b>420</b>	<b>480</b>	<b>540</b>

**Admissions Requirements**

Allegiant Prep will establish and follow an admissions policy that is in full compliance with IC 20-24-5-4 and will not limit student admission in any manner that a traditional public school is not permitted to. We are non-selective, open to all applicants residing in Indiana, and will enroll any eligible student who submits a timely application for enrollment unless the number of applicants exceeds seats available. In this instance, we will adhere to our lottery policies.

**Pre-admission Activities.** Parents and families are a valued and respected member of our school community. The content of our charter and school design is a promise to ensure each student is safe,

respected, and acquiring the academic and character skill-sets necessary to be successful in college and life. Our parent and family partnerships will be built on respect and accountability, we believe both the school and our families play a critical role in the success of each student at school. Attendance or participation in any pre-admission activities will be voluntary and in no way impact student enrollment eligibility in the school.

- **School Information Sessions.** Between June of 2017 and December of 2017, the Head of School will lead at least 15 school information sessions. These important community meetings will be held within the zip code of the targeted area of the proposed school. The objective of these information sessions are to introduce 2-3 key elements of the school (i.e. student orientation, homework, family engagement, etc.) to the general public and potential families. The Head of School will engage attendees in discussion and questions about school elements covered. In Y0, the Governing Board and volunteers will support the Head of School during these sessions. In Y1 and beyond, school staff and student families support the Head of School.
- **Canvassing.** Between June 2017 and April 2018, Allegiant Prep's Head of School will lead monthly canvassing events to recruit students and inform families that reside in the target zip code about the mission and vision of the school. The Head of School, supported by the Governing Board, enrolled families, and volunteers, will spend two hours speaking with families on their porch, handing out literature, and posting information on the school at local business. In addition to canvassing events the school leader and volunteers will attend neighborhood events hosted by: community centers, churches, and the library. Prior to canvassing events all volunteers will receive training on how to articulate the key elements of the school design, and will be equipped with Allegiant Prep literature that provides families with information on the school, dates and times of School information sessions, and the Head of School contact information.
- **One-on-One Meetings.** Once each family has completed the enrollment process they will be scheduled to have an individual family meeting with the Head of School. These meetings may take place at a coffee shop, library, or the family's home. These meetings will give the families the opportunity to share what they want for their students' education and life. During these meetings the Head of School will also cover the core values of the school, daily schedule, family/school communication, and answer any questions the family may have that was not covered. In closing the Head of School would review the Community Contract, a document that list the responsibilities of the family, school, and student. This document symbolizes our commitment to Unity "I am because we are". The family and school leader leave the meeting with a clear sense of what they are accountable for in ensuring the students success. The Head of School would sign under the responsibilities of the school (i.e students will be in a safe and structured environment) and the family would sign under the responsibilities of parents/guardian (i.e. I will check students Lifework (homework) and sign each evening). The student would not sign their portion of this contract until the last day of student orientation when they have a working understanding of what it takes to be and APA student. During this signing ceremony families and community members are encouraged to attend to celebrate this transformational moment in the life of our new to the school students.
- **Family Orientation Sessions.** On July 19 and July 24 (and always during the last few weeks of teacher summer PD in subsequent years), Allegiant Prep will host families for two separate family orientation sessions. All families and students are strongly encouraged to attend one of the two sessions. During the 90-minute session, families engage in the day and the life of what their students will experience each day. Items discussed during this time include: drop off/pick up procedures, uniform expectations, behavior expectations, culture system, daily schedule, walk-thru of building, and meeting students' homeroom teacher. Families depart excited and further inspired about their decision to enroll their students at Allegiant Prep.

**Non-Discrimination Policy.** Allegiant Preparatory Academy Charter School provides equal opportunities without regard to race, color, national origin, gender, age, disability, sexual orientation, family situation, religion, political affiliation, or veteran status in its educational programs and activities. This includes, but is not limited to, admissions, educational services, financial aid, and employment. Any complaints or allegations of any violation of this statement should be immediately directed in writing to: Rick Anderson (or his designee), Allegiant Preparatory Academy Chief Executive (Head of School).

### **Timeline and Procedures**

**Intent to Enroll Forms.** Intent to Enroll forms will be accessible to potential student families after authorization electronically and in hard copy (to be dispersed during canvassing, and community outreach events). All completed Intent to Enroll forms will be date and time stamped and filed chronologically in a safe and secure location. This system will be managed and maintained by the Head of School until the Operations Manager is hired in February.

**Enrollment Open.** Enrollment opens each year for the following fall on the first business day of October at 8:00am. In 2017, that will be October 2. Our application will be accessible via online and hard copy.

**Enrollment Close.** Enrollment closes each year on the last Friday in March at 5:00pm. In 2018, that will be on Friday, March 30. All applications must be received during the open enrollment period to be entered into our lottery. All applications accepted after the last Friday in March will be placed at the end of our waitlist.

### **Lottery Dates and Procedures**

Pursuant to IC 20-24-5-5, should the number of applicants exceed the number of available seats, we will hold a random drawing in a public meeting for student enrollment two weeks after the application deadline. The lottery will be governed by the following principles:

1. All students who have submitted a formal application prior to the deadline will be allowed to enter the lottery. In 2018 the date is March 30.
2. All students drawn in the public lottery will receive an offer for a seat in the school until available entry grade seats are filled.
3. Students who are drawn after all seats are filled will be added to an ordered wait list, and will come off the wait list once seats become available in the order they are listed.
4. Applicants who are siblings will be entered into a separate lottery by grade and drawn before non-sibling applicants for that grade. Sibling preference is designed to ensure that all students within a family are able to, if desired, attend the same school.

In accordance with IC 20-24-5-5, should a public lottery be required, admission preference is prioritized based on the following criteria:

- Students currently attending Allegiant Prep
- Siblings of students attending Allegiant Prep

**Wait Lists.** After the lottery, we will begin the process of notifying families of their acceptance or wait list position no later than five business days after the lottery. After this notice of status, families will have 10 business days to confirm in writing their intent to enroll their student in Allegiant Prep and submit an enrollment packet (includes: birth certificate, proof of address, and immunization records). We will allow families two opportunities to complete enrollment paperwork and meet Allegiant Prep staff. Families

that fails to communicate intent to enroll within this time frame will lose their spot and their position will be offered to the next student on the wait list. Families offered a spot on the waitlist have 10 business days to confirm intent to enroll and submit required paperwork before their seat will offered to the next family on the wait list.

**Yearly Affirmation of Intent to Re-enroll.** On our parent mid-year survey we will begin to collect information on families' intention to re-enroll their student for next school year (and inquire if siblings are enrolling). This information will inform our enrollment strategy for the Kindergarten class, and backfilling of seats in other grades. Families that indicate students will not be returning (on May survey), will forfeit their seat and it would be offered to the next family on the waitlist. If the family who forfeits their seat changes their mind (wants to re-enroll) they would be placed on our waitlist for the following school year. This process also applies to families that withdraw their student during the course of the school year.

**Student Transfers.** Families interested in enrolling their student after the enrollment deadline has ended would be granted a seat if it is available. In the case where seats are not available, the student would be placed on our waiting list in the next numerical order.



**ALLEGIANT PREP**  
ACADEMY

# Attachment 8

Student Discipline Policy

**Attachment 8: Provide the school’s discipline policy, which should include a summary of the following:**

- a. Practices the school will use to promote good discipline in the school, including both penalties for infractions and incentives for positive behavior.
  - b. A preliminary list of offenses for which students in the school must (where non-discretionary) and may (where discretionary) be suspended or expelled, respectively.
  - c. An explanation of how the school will take into account the rights of students with disabilities in disciplinary actions and proceedings.
  - d. A description of the appeal process that the school will employ facing expulsion.
  - e. How parents will be informed of the school’s discipline policy.
- 

**Student Discipline Policy**

College preparation starts in Kindergarten, and to ensure we fulfil our mission and place students on the path to college, we must have a safe and structured learning environment. Allegiant Prep staff will ensure that students are motivated to demonstrate academic excellence and positive behavior at all times. Normed systems of learning and behavior expectations will create an environment that is stable and predictable so that students are clear on the expectations 100% of the time.

Allegiant Prep’s unique combination of structure and joy will motivate all students to work their hardest to develop new academic skill-sets and treat others as they would want to be treated. Expectations for how students enter the building, start instruction, transition in the hallway, and engage with peers and adults will create an environment of minimal disruptions where every student feels respected and can focus on building academic and social skills. Students will also be celebrated for demonstrating our core values like Perseverance. Each day students will engage in chants like “You go, girl” or “You go, boy” for working hard to use specific strategies to read and solve challenging problems. Adults will focus on celebrating students’ actions: Instead of saying, “You are smart,” Allegiant Prep teachers will say, “Great job showing perseverance, instead of giving up you used your reading strategy to sound out that word.” Allegiant Prep expectations and core values are the foundation that ensure instructional time is sacred and students develop a moral compass to guide their decisions and interactions with others.

**School-wide Behavior Expectations.**

- Respect- Treat others the way you want to be treated.
- Responsibility- Take ownership of our actions.
- Integrity- Do the right thing even when no one is looking.
- Perseverance- Work hard from the first minute to the last minute of the day.
- Unity- I am because we are.

During our three-week adult summer professional development classroom teachers and other school staff are trained on using Strong Voice, Positive Narration, and What to Do to ensure students are held accountable to clear expectations. At Allegiant Prep, instructional time is sacred and teachers use these taxonomies to minimize student off task behavior and maximize learning time. These Teach Like a Champion techniques are used at some of the highest achieving charter schools across the country.<sup>1</sup>

Our discipline system is differentiated for our Lower and Upper Academy students.

**Lower Academy:** In K-4, we will use a clip yard stick as our grade wide system to monitor individual student behavior. The clip stick is a yard stick covered with five different distinguished colors: gold, blue, green, yellow, and red. Each individual student has a wooden clothes pin with their name on it, and at the beginning of the day each students clip starts on Green. When students consistently display our core

---

<sup>1</sup> Lemov, Doug. *Teach like a Champion 2.0: 62 Techniques That Put Students on the Path to College*. N.p.: n.p., n.d. Print.



values (Respect, Integrity, Responsibility, Perseverance, and Unity) they remain on green or earn their way to gold. When students choose to not follow directions their clip is moved down to yellow or red. The clip system is restorative; as soon as a students' clip is moved down the classroom teacher(s) actively observe for students to do the right thing, and then move the students clip back up the yard stick. At the end of each day the students color is circled on their evening Lifework, and is sent home for their family to see. Each students' family is required to sign the Lifework to confirm they reviewed Lifework and students color from the day. Students that end the day on Red would receive a call from a staff member to discuss behavior and reinforce what student needs to do to have a better day tomorrow.

**Upper Academy:** In 5-8, we will use a "paycheck" system to motivate students to meet our behavior expectations<sup>2</sup>. At the beginning of each week, each student starts with \$50 (not physical dollars) in our online Kickboard platform. When students are going above and beyond in demonstrating a core value, such as raising hand to ask the teacher to assist a peer with a problem and demonstrating Unity, they have the opportunity to earn dollars. When students are not following directions, for example, talking when the expectation is silent and not showing integrity, they can lose dollars. At the end of the week students who have accumulated a certain dollar amount are acknowledged during weekly community circle and earn specific incentives (i.e. fun snack, eat in the Gold member lounge during lunch, and assist teachers with special projects). Students' families receive a weekly printed report that list how many dollars students earned and lost from the previous week, and are required to sign and send back to school with student the following day.

**Behavior Management Cycle.** Teachers will be trained on our behavior management cycle during summer professional development. The behavior management cycle empowers teachers to positively manage and motivate a classroom of students while simultaneously executing on a focused and rigorous lesson. Below is the sequence of actions teachers will be trained to take when addressing a student(s) who is not following directions.

1. Teachers clearly communicate directions to students and scan to ensure directions are followed.
2. Teachers utilize narration and least invasive tactics to support compliance with directions.
3. Teachers take corrective action with students not complying with directions (i.e. consequence).

In his former roles as Dean of Students and Head of School at Freedom Preparatory Academy, Rick Anderson has attended Professional Development on implementing and training others to implement the Behavior Management Cycle, including providing real-time coaching to teachers. He will bring this skill set to Allegiant Preparatory Academy as he plans and executes staff PD.

**Joy.** At Allegiant Prep our rigorous and structured academic program is infused with joy. When students go above and beyond, teachers' prompt students to celebrate their efforts through a "**J-Factor**," a quick celebration that boosts joy and student engagement. As students persevere through rigorous instruction, or help another student clean up a spilled drink, these actions are positively reinforced with joyous acknowledgment. J-Factors are also used to reinforce academic fundamentals during transitions, an example of this is Kindergarten students counting in unison from 1-20 while moving from their desk to the carpet for Read Aloud. Our students are expected to work extremely hard each day, strategic joy is a way to celebrate their efforts while reinforcing academic excellence and core values. Each week, a student is acknowledged during a grade-wide community circle from each cohort as the **Student of the Week**. Students receive this honor by consistently displaying our core values and academic excellence. Cohorts are also collectively acknowledged for meeting group goals such as the highest Lifework completion percentage for the week.

---

<sup>2</sup> The Paycheck System is modeled after similar merit/demerit based systems use at Excel Academy in Boston, MA and Intrepid College Prep in Memphis, TN. It uses the idea of a "paycheck" to support with financial literacy, and in no way equates to monetary payment to students.

**Behavioral Incentives.** Students work in class daily to earn Green, Blue, or Gold by the end of the day. Students that earn Green, Blue, or Gold 5 days in a row have the opportunity to go to the treasure chest (books, snacks, and small toys) during the weekly Community Circle.

**Instructional Incentives.** During instruction students showing exceptional Perseverance, Responsibility, and Unity will be publicly acknowledged by classroom teachers and be selected to assist (i.e. passing out books, collecting math manipulatives or selecting and leading classroom chant or J-factor).

**Infractions and Consequences.** Students learn during student orientation Allegiant Prep expectations and the incentives and consequences associated with our culture system. In the **Lower Academy**, each students clip starts on “Green” each day and when a student is following the directions and going above and beyond their clip can be moved up. When a student chooses to not follow teacher directions or school expectations their clip can be moved down. **Figure 8.1** below provides a table of chart colors and correlating actions for K-4 students.

<b>Figure 8.1: Lower Academy Consequences</b>		
<b>Action/Consequence</b>	<b>Color</b>	<b>Description</b>
Exemplary Behavior	Gold	Students consistently going above and beyond to display Allegiant Prep’s core values.
Excellent Behavior	Blue	Students consistently demonstrate strong behavior in alignment with our core values.
Good Behavior	Green	Student show core values in class in alignment with expectations
First Warning	Yellow	Teacher has explicitly reminded student of expectation for behavior, student continues to not meet expectation. As a consequence, the students clip is moved down.
Poor Behavior	Red	Students second warning, may be asked to move away from peers to reset or cool down in classroom. Cool down last for no more than 5 minutes. Student sits up silently at desk or carpet until teacher ask them to re-join group.
Leadership Team Check-in		Student has consistently disregarded classroom expectations and has not turned behavior around even after being isolated. If student behavior escalates and becomes a gross disruption or threat of physical danger a member of the leadership team would be contacted to intervene. A call to the family would be made, this behavior could result in future loss of privileges (talk time during lunch, recess, etc.)
Student is sent home		The student has been removed from class multiple times and addressed by a member of the leadership team. Student would be given work to complete in Head of School or Dean of Students office, if behavior persist family would be contacted to pick student up from school.

**Upper Academy (5-8) Paycheck system.** In the Upper Academy, we move towards a merit and demerit based ‘paycheck’ system, which will be is tracked via an online system, such as Kickboard (online behavior management platform). When students are consistently demonstrating core values and going above and beyond they have an opportunity to earn dollars. Students that earn a certain amount of weekly dollars can earn their way to becoming a Silver, Bronze, or Gold member.

- Bronze- \$55-\$60 (bronze member wrist band)

- Silver- \$61-\$64 (silver member pencil)
- Gold- \$65+ (Gold member pin/ snack or lunch provided the last Friday of the month)
- **+5.** A +5 is the highest individual incentive a student can receive. A student may receive a +5 for finding money in the hallway and turning it into a teacher (Integrity).
- **-5.** A -5 is the largest infraction a student can receive. A student would receive an automatic -5 for talking back to an adult (Disrespect), and would have to serve an in school detention during lunch.

**Weekly Update.** Every Wednesday Upper Academy students receive a paycheck report with a grade report. This report outlines all dollars earned or lost for the previous week and what for. Families are expected to review, sign, and return with the student the following day.

**Upper Academy Incentives.** In addition to earning the opportunity to be a Bronze, Silver, or Gold member 5-8 students can also earn going to the Gold member lounge during lunch. A separate space inside the cafeteria for Gold members to eat snacks, read books, and play games.

**Upper Academy Infractions and Consequences.** In the Upper Academy similar to the Lower Academy, if a student commits a minor offense, they will receive a warning, and lose a dollar. Multiple minor offenses will lead to more than one-dollar taken or a -5. Some examples of demerit worthy behavior include:

- Failure to meet school expectations
- Failure to follow directions
- Being out of area
- Eating unauthorized candy, food, or snack
- Talking back to an adult
- Refusal to complete academic work

**Figure 8.2** is a list of misbehaviors aligned to school core values that would warrant a paycheck deduction.

<b>Figure 8.2: Upper Academy Paycheck Deductions</b>		
<b>Behavior</b>	<b>Core Value</b>	<b>Consequence</b>
Not following teacher directions (i.e. talking when expectation is silent, not work on classwork when ask to do so by teacher)	Respect	-1
Out of area	Responsibility	-1
Inappropriate language	Respect	-1
Talking out of turn (calling out)	Responsibility	-1
Not follow classroom or school rules	Responsibility	-1
Eating unauthorized food (candy, gum, etc.)	Integrity	-1
Academic dishonesty	Integrity	-5
Talking back to adult	Respect	-5
Putting hands on another student/rough-housing	Respect	-5
Profanity	Respect	-5
Out of Uniform	Responsibility	-5

**Suspensions and Expulsions.**

## **Suspension**

Serious breaches in discipline policy or behavior that creates a consistent classroom disruption or jeopardizes student or staff safety can result in a suspension. The Head of School or Dean of Students approves all student suspensions for one to three days. The Head of School holds the right to extend a suspension beyond three days after discussing a student incident or incidents with school staff. The Board of Directors will be notified of all suspensions lasting longer than three days. In all instances of suspensions, parents or guardians will be informed via phone and letter stating the incident and duration of suspension. The students' family would be required to attend an in person conference with a member of the school leadership team before the student would be allowed to return to school.

- Causes for student suspension include, but are not limited to:
- Fighting, hitting, or physical aggression toward another student
- Bullying or intimidating another student
- Physical aggression towards a teacher, staff member, or other adult at school
- Inappropriately touching other students (private areas etc.)
- Taking or attempting to take money or property from another student or adult that does not belong to them.
- Constant disruptive behavior or continued and willful disobedience
- Excessive disrespect
- Habitually coming to school unprepared
- Harassment or violent threats
- Open defiance to authority
- Willfully causing or attempting to cause defacement or substantial damage to school property
- Failure of the parent to attend a mandatory parent conference
- Other misbehaviors identified at the discretion of the school and leadership.

## **Expulsions**

Expulsion of a student will only take place after the student and the student's parents/ legal guardians are given notice of their right to appear at an expulsion meeting either in person or through certified mail. Indiana law (Indiana Code- Section 20-33-8-19) provides the Head of School with the authority to expel students without Board involvement for the following behaviors (Indiana Code- Section 20-33-8-14): student misconduct and substantial disobedience. We will consider the following offenses to warrant consideration for expulsion: Fighting/violent behavior resulting in serious injury or with use of a weapon; Assault and battery against school community member; Possession of a weapon or explosive device of any kind; Unwanted physical touch (sexual nature); and Possession, use, or distribution of illegal or unauthorized prescription drugs.

## **Discipline and Special Education Students**

All students are expected to meet the requirements for behavior as set forth in this handbook. In addition to those due process protections afforded to all students, the Individuals with Disabilities Education Act and related regulations require that additional provisions be made for students who have been found eligible for special education services or who the school knows or has reason to know might be eligible for such services. Students who have been found to have a disability that impacts upon a major life activity, as defined under section 504 of the Rehabilitation Act, are, generally, also entitled to increased procedural protections prior to imposing discipline that will result in the student's removal for more than ten (10) consecutive school days or where there is a pattern of short term removals exceeding ten (10) school days in a given year. The following additional requirements apply to the discipline of students with disabilities.

1. The IEP of every student eligible for special education or related services shall indicate whether the student can be expected to meet the regular discipline code of the school or whether the code should be modified to address the student's individual needs.
2. Students with disabilities may be excluded from their programs for up to ten (10) school days to the extent that such sanctions would be applied to all students. Before a student with a disability can be excluded from his/her program for more than ten (10) school days in a given school year or subjected to a pattern of removal constituting a "change of placement," building administrators, the parent(s)/guardian(s) and relevant members of the student's IEP or 504 Team will meet to determine the relationship between the student's disability and behavior (Manifestation Determination Review). In most instances, during disciplinary suspensions exceeding ten (10) school days in a single school year, the student shall have the right to the received services identified as necessary by the Team to provide him/her with a free appropriate public education during the period of suspension.
3. If the Leadership Team, the parent(s)/guardian(s), and relevant members of the student's IEP or 504 Team determine that the student's conduct was not a manifestation of the student's disability, the school may discipline the student in accordance with the procedures and penalties applicable to all students but will continue to provide a free appropriate public education to those students with IEPs. The student's IEP or 504 Team will identify the services necessary to provide a free appropriate public education during the period of suspension.
4. If the Leadership Team, the parent(s)/guardian(s) and relevant members of the student's IEP or 504 Team determine that the conduct giving rise to the disciplinary action was a manifestation of the student's disability, the student will not be subjected to further removal or suspension from the student's current educational program based on that conduct. Also, the IEP or 504 Team will review any existing Behavior Intervention Plan or, where appropriate, conduct a Functional Behavioral Assessment, and develop a Behavior Intervention Plan.
5. Under certain special circumstances as defined by federal law, school personnel may place the student in an interim alternative setting for 45 school days, without regard to the manifestation determination. These special circumstances include incidents where the student possesses, uses, sells or solicits illegal drugs, carries or possesses a weapon, or inflicts serious bodily injury while on school premises or at a school function. Otherwise, if the student's continuation in the current placement is substantially likely to cause injury to himself/herself or others the school may request an expedited hearing for an order to place a student in an alternative setting for a period not to exceed 45 days. The school also has the right to seek a court injunction.

Students with Disabilities under Section 504. Students who are not eligible for services under the IDEA, but who have disabilities within the meaning of Section 504 of the Rehabilitation Act are entitled to certain procedural protections associated with Section 504.

### **Appealing an Expulsion**

Allegiant Prep will fully comply with Indiana law (Indiana Code- Section 20-33-8-19) in the instance that a parent(s)/guardian(s) make a written appeal to the Board of Directors in response to a student's notice of expulsion. An appeal to an expulsion must be written and submitted to the Board of Directors within (10) days of the notice of expulsion being received. The appeal would be heard at the discretion of the Chair of the board through the full Board or a Board sub-committee (two or more directors designated by the Chair). The guardians will be notified again in writing of the date, time, and place of the meeting where they will discuss the appeal. The guardian will be provided the opportunity to speak.

During the expulsion hearing the school will record the meeting, a copy of the hearing will be made available to the student's guardians per their request (all notices and recordings will be translated into the student's/guardians primary language). A student or student's guardians that do not attend the expulsion meeting after receiving notice will forfeit all rights to contest and appeal the expulsion.

The decision of the School Governing Board of Directors after the appeals process is final. School expulsion is for a maximum of one year.

#### **Parent Notification of Discipline Policies**

Prior and during enrollment each student's family/guardian will receive a copy of the Allegiant Prep Student and Family Handbook which will include school policies and procedures, student code of conduct, and school related information. After reviewing the handbook which outlines our discipline policy, the student's guardian(s) would sign an "Acknowledgment of Receipt" confirming they have received a copy of the Student and Family Handbook and our familiar with the contents. A copy of the "Acknowledgment of Receipt" would be added to each student's personnel file. Each family will have multiple opportunities to receive, review, and sign the "Acknowledgment of Receipt" prior to the student's first day of school which includes: Individual family meetings, Enrollment, and Family Orientation nights.



**ALLEGIANT PREP**  
ACADEMY

# Attachment 9

Evidence of Support from Community  
Partners

## Attachment 9: Evidence of Support from Community Partners

Evidence of demand from the community, evidence of community engagement, and evidence of support from community partners. This attachment, may include documentation of public forums held, meetings with community leaders (e.g., mayors, council members, neighborhood leaders), letters of intent and/or memoranda of understanding, and should specify the resources to be committed or contributed from the partner, as applicable. Please address, either in Attachment 9 or in the narrative, detailed plan to accomplish successful community engagement during the school’s pre-opening period and leading into the school’s first year.

### Evidence Community Engagement

Allegiant Prep’s name is inspired by the saying, “*It takes a village*”. A school, families, and the community must be aligned and work in partnership to ensure the academic and life success of children. Westside community members and families’ beliefs are reflected in the Allegiant Prep school design. Lead founder and proposed Head of School, Rick Anderson, has met with Westside residents, community leaders, attended Neighborhood Association meetings, volunteered in early education childcare programs, and is holding the first of many Community Discussions in April to give potential families the opportunity to understand the school mission and vision, as well as to voice their questions and suggestions regarding a school in their community. In conversations and interactions all stakeholders expressed (1) a strong desire to have access to more quality educational options and (2) alignment with our focus on literacy, character development, and preparation for college and life success. Events and meetings to date can be found in **Figures 9.1, 9.2, and 9.3.**

Event	Date	Description
We Care Neighborhood Association Meeting	11/28/16	Monthly member meeting
Westside Educational Task Force	2/22/17	Group of educators and community members who meet monthly to discuss and address educational issues on the Westside of Indianapolis. *Presented mission and vision of Allegiant Prep to community members.
Taste of the Westside	2/24/17	Fundraiser for George Washington High School
The Exchange Indianapolis Urban League	3/6/17	Monthly member meeting
100 Black Men of Indianapolis	3/10/16	Monthly member meeting

Met With	Date
James Duke, Program Director, Supplier Diversity, IU Health	8/17/16
Andy Fraizer, Executive Director, Indiana Assoc. For Community, Economic Development	9/14/16
Martha Henn, River West Great Place & Near West Quality of Life Convener	11/21/16
Jordan Rodriguez, Neighborhood Advocate, Mayor’s Office of Neighborhood Services	11/30/16
Vop Osili, City Council Member District 11	12/1/16
Pitt Thompson, Executive Director, Christamore House	2/7/17
Sara Marshall, Indianapolis Teaching Fellows, Site Director	12/19/16
Steven Morris, Hawthorne Neighborhood Association	12/28/16
Jim Grim, Director of University and Community School Partnerships, IUPUI	2/17/17



Amy Conrad-Warner, Vice Chancellor of Community Engagement, IUPUI	2/10/17
Adrienne Opp, Hawthorne Neighborhood Association	2/10/17
Representative Justin Moed District 97	2/15/17
Kimberly Coveney, Director of Development and Communications, Mary Rigg Center	2/16/17
Mary Chalmers, Neighborhood Development Specialist, Indianapolis Resource Center	2/20/17
David Corbitt, Attorney, Krieg DeVault LLP	2/21/17
Phil Votaw, Westside Community Development Corporation	2/23/17
Senator Greg Taylor District 33	3/7/17
Nancy Mobley, Director Haughville Public Library	3/8/17
Evelyn Evans, Director, New Beginnings Childcare	3/10/17
Bishop Peter Fenton, First Samuel Baptist Church	3/10/17
Dr. Tawana Ware, Assistant Professor, Indiana University School of Dentistry	3/10/17
Lee White, Vice President of Business Development, Mainscape	3/10/17

**Figure 9.3: Allegiant Prep Events Post Charter Application Submission**

Date	Event	Location	Description
4/6	Canvassing- Invite families to attend 4/13 Community Discussion meeting	Proposed target area	Canvass in neighborhood surrounding First Samuel Baptist (1402 N. Belleview Pl.) to attend 4/13 Community Discussion meeting
4/13	Allegiant Prep Community Discussion Meeting (flyer attached)	First Samuel Baptist Church	Potential families and students provide input, feedback, and ask questions about the mission and school design of Allegiant Prep
5/6	Community Clean up- Great Indy Clean Up	Proposed target area	Founding Team, volunteers, and potential students and families will collect trash alongside neighborhood streets in proposed target area
May-on	Tabling	Various locations	Members of Founding Team set up an informational table at various community events & engage in conversations with community members.

Proposed Head of School Rick Anderson works out of the Haughville Library on a weekly basis and has held multiple informal tabling conversations with potential families and students. He will continue to table on a weekly basis at the Haughville Library moving forward.

Over the last eight months, the Founding Team has engaged with several community organizations, leaders, and elected officials to share the proposal for Allegiant Preparatory Academy. Letters are below in **Attachment 9**.

#### **Pre-opening Period and Leading into School's First Year**

To build on the demand and awareness of Allegiant Prep we have developed a preliminary continued community engagement plan. If authorized, our team plans on continuing to build upon a foundation of community awareness that will ultimately translate into families enrolling their students in our inaugural

K-1 class in the Fall of 2018. Post authorization we will employ a community engagement plan outlined in **Figure 9.4** to develop new community partnerships and have as many meaningful touch points with potential families as possible.

<b>Figure 9.4: Allegiant Prep Community Engagement Action</b>	
<b>Event Name</b>	<b>Description</b>
Canvassing	Group of 2-3 volunteers walk neighborhood to distribute information, engage in conversation with families and gather signatures of support from community members.
Stop and Chat	Members of Founding Team & volunteers sit outside of local businesses to distribute information, engage in conversation with families and gather signatures of support from community members.
Community Meetings & Info. Sessions	Members of Founding Team host an information session about key tenants of Allegiant Prep’s design and provide attendees the space to give feedback and ask questions.
Tabling	Members of Founding Team set up an informational table at various community events & engage in conversation with community members.
Family Meet & Greet	Smaller gatherings with light refreshments where families have opportunity to interact with members of Founding Team and provide input on community strengths & needs, learn more about the school, and fill out intent to enroll forms. These meet and greets will also feature a member of our Founding Team conducting a Read Aloud lesson to further emphasize our focus on literacy.
Continued Community Stakeholder Meetings	We will continue our community outreach meetings with various stakeholders and community groups. Many meetings already scheduled focus on better understanding the unique strengths and needs of students on the Westside of Indianapolis.
Flier & Survey Distribution	Disbursement of information and feedback solicitation will be focused at many Head Starts and Westside daycare providers.
Volunteer at early education childcare centers	Mr. Anderson will volunteer at Westside early education childcare centers to build relationships with families and students, better understand student and family needs, and enroll potential students.



**ALLEGIANT PREP**  
ACADEMY

# COMMUNITY DISCUSSION

A community discussion hosted by Allegiant Prep Academy about K-8 school opportunities on the Westside.

---

**THURSDAY, APRIL 13TH**

6:00 PM

**FIRST SAMUEL BAPTIST CHURCH**

1402 N. Belleview Pl.  
Indianapolis, IN 46222

---

**Food Provided - Families Welcome**

For more information, contact Rick Anderson  
(317) 619-9464 | [randerson@buildingexcellentschools.org](mailto:randerson@buildingexcellentschools.org)



CENTER FOR  
LEADERSHIP  
DEVELOPMENT

*Empowering Youth • Strengthening Community*

BOARD OF DIRECTORS

CHAIRMAN

Thomas A. King  
*Indiana State Museum*

VICE CHAIRMAN

Bill A. West  
*WestKeyna, LLC*

SECRETARY

Sydney Steele  
*Kroger Gardis & Regas, LLP*

TREASURER

Patrick F. Carr  
*UnitedHealthOne*

PAST CHAIRMAN, MEMBER

Dr. Robert L. Bowen, P.E.  
*Bowen Engineering Corporation*

PAST CHAIRMAN, MEMBER

Jerry D. Semler  
*The Companies of OneAmerica*

PAST CHAIRMAN, MEMBER

Stephen A. Stille  
*Smith Amundsen*

MEMBERS

Nick Anthony  
*Duke Realty*

Troy Arthur  
*NCAA*

Doug Brown  
*Fusion Alliance*

Quinn Buckner  
*Indiana Pacers*

Matthew Conrad  
*Frost Brown Todd*

Daniel Elsener  
*Marian University*

Robert Gauss  
*Ice Miller LLP*

Caryn Glawe  
*Faegre Baker Daniels LLP*

Dr. Jacqueline S. Greenwood  
*Metropolitan School District of Pike Township*

Jeffrey Harrison  
*Citizens Energy Group*

Bruce Hill  
*Eli Lilly and Company*

Carolene Mays-Medley  
*White River State Park  
Development Commission*

John Otteson  
*JPMorgan Chase, N.A.*

Randall Reichmann  
*Old National Bank*

Derica W. Rice  
*Eli Lilly and Company*

James Sadtler  
*Indianapolis Power & Light Company*

Joseph Slaughter  
*Retired*

LaTanya Smith  
*Independent Consultant*

Sydney Steele  
*Kroger Gardis & Regas, LLP*

Rhonda Stoughton  
*The Stoughton Group*

Curtis E. Taylor  
*Wabash Valley Power Association*

Patrick Walsh  
*Emmis Communications Corporation*

Charles T. Williams  
*Radio & TV, Indianapolis-Chicago*

Dennis E. Bland, Esq.  
*President  
Center For Leadership Development*

March 3, 2017

Indiana Charter School Board  
407 Fulton Street, Ste. 301  
Indianapolis, IN. 46202

Dear Indiana Charter School Board,

What makes serving at the Center for Leadership Development such a high and rewarding privilege is having the opportunity to see youth magnificently blossom into outstanding, caring, intelligent adults of the highest character. I had this first-hand experience with Rick Anderson.

I first met Rick several years ago through his participation in the Center for Leadership Development. CLD is an after-school enrichment experience which nurtures African American youth for success as business, professional and community leaders. CLD strives to advance this mission by cultivating youth in the CLD's five cornerstone values, called the CLD *Principles for Success: Character Development, Educational Excellence, Leadership Effectiveness, Community Service, and Career Achievement*. Rick participated in a few of our programs and then returned as a volunteer upon entering college. Over this period, I have been afforded many opportunities to observe Rick.

Given my knowledge of Rick, his skill set and his heart, I am convinced he will make an excellent school leader. Rick, first and foremost, is a person of the highest character and integrity. Moreover, he is an intelligent, thoughtful, and caring of youth. In addition to these qualities, he has a tremendous passion for education and transforming education outcomes in youth, and he has a rich, diverse set of educational experiences which enable him to achieve these transformational education outcomes.

Given Rick's background in urban education, his great experience in education, and his commitment to children and education, I believe Rick is poised to found and lead Allegiant Prep. The school's emphasis on intense reading, building character and serving others is what really appeals to me. This focus is appealing because this emphasis drives holistic development and transformational living in those thus nurtured. Furthermore, I find this emphasis

2425 Dr. Martin Luther King Jr. St.  
Indianapolis, IN 46208-5546


OFFICE [317] 923-8111  
FAX [317] 923-8112

[www.cldinc.org](http://www.cldinc.org)

striking because I realize Rick is the embodiment of these principles. Therefore, if any leader is going to be effective in transmitting these values in others, it will be someone who is endowed like Rick.

For these and other reasons, I offer my categorical support for Rick's application for approval to found and lead Allegiant Prep on the West side of Indianapolis. All that you seek in a candidate, he superbly represents.

Yours for the development of youth,



Dennis E. Bland, Esq.  
President



## ***First Samuel Church (W)holistic Ministries***

---

***“A church manifesting, magnifying & glorifying God by serving mankind”***

*Ephesians 4:1-17; Romans 1:1; Philippians 4:13*

March 10, 2017

Indiana Charter School Board  
143 West Market Street, Suite 300  
Indianapolis, In 46204

To Whom It May Concern:

We are pleased to write a letter in support of Mr. Rick Anderson and his vision for Allegiant Preparatory Academy. We have had several conversations with him over the past several months which have been very enlightening. We share in his concern for the plight of our youth and his passion to develop an educational environment to meet the emotional, social and academic needs of our youth. Besides his heart and passion for youth and family, we are convinced that Rick's educational and career experience has equipped him to design and operate a successful school system that will aid youth in achieving their fullest potential both personally and academically.

Therefore, we fully support Rick Anderson and his proposal for Allegiant Preparatory Academy. We are also supportive of providing him with any type of resources we are able to provide on his journey to fulfilling this mission. We have confidence in Rick based on his determination and values as well as his educational and professional background. We wholeheartedly believe he will be able to accomplish all that he has set out to do and that Alegiant Prepartoray Academy will be a valuable asset to youth, families and the community.

Sincerely,

Bishop Peter Fenton, Pastor

---

First Samuel Church (W)holistic Ministries  
1402 N. Belleview Place, Indianapolis, IN 46222  
Bishop Peter Fenton, Pastor / Elder Thelma Fenton, 1<sup>st</sup> Lady  
Phone: 317-635-1942 Fax: 317-635-2133

# Goodwill Education Initiatives, Inc.

---



March 22, 2017

Dear Members of the Indiana Charter School Board,

It is my pleasure to provide this letter of support for Allegiant Preparatory Academy to a new K-8 charter school on the west side of Indianapolis.

GEI is the largest charter school operator in Indiana and operates twelve (12) charter schools in Central Indiana which support the mission of Goodwill Industries of Central Indiana, Inc. to improve the education, skills, employability, and economic self-sufficiency of adults and the future employability of young people.

I strongly support Allegiant Prep's mission to educate all students with rigorous academics, character development, commitment to the community, and a pathway to college. It is clear that the proposed school leader, Rick Anderson, understand that every child can and will succeed when given the right tools.

Without a doubt there is a definite need for more high-quality charter schools in Indianapolis on the Westside. Allegiant Preparatory Academy is committed to providing this through the talented leadership and an impressive board that is devoted to serving this neighborhood.

Respectfully,

A handwritten signature in cursive script that reads "Lakin Osborne".

Lakia Osborne  
Project Manager  
Goodwill Education Initiatives  
1635 W. Michigan Street  
Indianapolis, IN 46222  
Cell: 317-605-8092  
Email: losborne@excelcenter.org



## Indiana University Health

March 22, 2017

Mr. James Betley

Indiana Charter School Board

143 West Market Street, Suite 300

Indianapolis, IN 46204

This letter is in support of granting a charter to Allegiant Preparatory Academy Charter School and Rick Anderson, the proposed school leader. I first met Rick when he was a participant in the 100 Black Men Beautillion Militaire program when he was a High School Senior. As a teenager, it was clear that Mr. Anderson had a strong belief that a college education would be his ticket to upward mobility in his personal and professional life. I am excited about his work to found and lead a college preparatory school that will give Indianapolis students the skills necessary to attend and graduate from a 4-year college.

As a Mentor and Board Member of The 100 Black Men of Indianapolis, I appreciate the fact that Rick has stayed in contact with me over the years. I am impressed with his dedication to success and achievement. I would have to say that those are definitely his strengths. Rick routinely follows through on his commitments. Being a leader that is involved in multiple activities, Rick has gained my utmost respect because I see the potential he has to be very successful. It is not easy balancing so many family, school and community activities at the same time, but Rick seems to achieve his balance well.

Mr. Anderson's track record as an effective school leader the past three years along with Allegiant Prep's focus on high expectations, give me confidence that he will lead a high performing school focused on exemplar student outcomes and growth. I believe all students should have access to a quality education that develops academic, social, and character skills that will ensure college and life success.

I am impressed with the school design of Allegiant Prep and respect the rigorous training executed by Rick Anderson, the proposed school leader through the Building Excellent Schools Fellowship, one of the best preparation programs for charter school leaders throughout the nation. Allegiant Prep will significantly elevate the academic outcomes of the children of Indianapolis.

I strongly urge your approval so that Allegiant Prep can open in the Fall of 2018. If you have any questions or concerns, please do not hesitate to contact me directly at [jduke4@iuhealth.org](mailto:jduke4@iuhealth.org).

Best Regards,

James A. Duke, Program Director, Supplier Diversity, IU Health



March 8, 2017

Indiana Charter School Board  
143 West Market Street, Suite 300  
Indianapolis, IN 46204

Dear Indiana Charter School Board:

My name is Chris Smith and I'm the Lead Pastor of People's Church in Indianapolis. I'm writing this letter in support of the proposal Allegiant Preparatory Academy has presented to you seeking approval to open a K-8 school in Indianapolis. I've had the opportunity of getting to know the founder Rick Anderson over the last few months. He is in a small group that I lead, faithfully attends church and faithfully serves in our 4-year-old - first grade class at church on Sundays. He is impacting kids at our church, is a committed volunteer and works well with others. His family is a huge blessing to our church.

In the time, I have spent with Rick it has been abundantly clear he has a passion for education and a deep conviction that all students can succeed in school and life regardless of background and home life. He also has an extensive background in education, he has worked 6 years in public education as a teacher and the last three years as a school leader. He is a hard worker, has high character, a man of integrity and great with people. He also is dedicated to his wife and daughter which I believe also speaks highly of him.

Based on Rick's past record of success and knowing him, I believe that Allegiant Preparatory Academy will add to the growing number of schools in our community that believe that every child can achieve at the highest level, every child matters and every child deserves a great education no matter what their background is.

From my conversations with Rick, I know Allegiant Preparatory Academy will provide a school that provides students with the education and structure they need to succeed in life, prepare them for college and to help every student reach their God given potential. It is a school that will not only impact the lives of students but also the community.

Upon reviewing the application, I hope you will agree that Allegiant Preparatory Academy will make an excellent addition to school options for your students and their families.

Sincerely,

A handwritten signature in black ink that reads "Chris Smith". The signature is written in a cursive, flowing style with a large initial "C" and a stylized "S".

Chris Smith  
Lead Pastor of People's Church Indy  
Email: [chris@peopleschurch.tv](mailto:chris@peopleschurch.tv)  
Cell: 317-775-8054



March 26, 2017

Indiana Charter School Board  
407 Fulton Street, Suite 301  
Indianapolis, IN 46202

Dear Indiana Charter School Board,

I am writing this letter as an expression of my support for Mr. Rick Anderson and his pursuit of opening the Allegiant Preparatory Academy in Indianapolis, Indiana. As the Associate Dean for the Office of Diversity, Equity, and Inclusion at Indiana University School of Dentistry (IUSD), I work to enhance oral and systemic health of our citizens by increasing access to oral care for all populations. Our goal is to improve oral health care by supporting the admission and graduation of minority and disadvantaged students in our Dental Assisting and Hygiene, Doctor of Dental Surgery (DDS), and graduate programs. We are actively working to identify, educate, and mentor a population of students who can enter our programs and provide needed access to quality oral health care. I support the work of Mr. Anderson and his goal of preparing the children in the Near West-side of Indianapolis for the future.

Demand for dental education (DDS degree) and advanced dental education remains very high nationally and Indiana is no exception. In the 2015-16 application cycle (DDS Class of 2020) over 1500 applicants competed for 106 traditional (four year) DDS positions. The Class of 2020 consists of 71 Indiana residents and 35 non-residents with 46% being females. Programs to support underrepresented minorities in the early educational years are very important and can help to students prepare for the rigor of our programs. According to *STATs Indiana*, Indiana's 2015 population of 6,619,680 included 636,346 (9.6%) African-Americans, 441,909 (6.6%) Latino/Hispanic-Americans, 26,656 (0.4%) Native-Americans, and 128,882 (1.9%) multi-racial citizens representing 18.5% of Indiana residents. This compares to a practicing Indiana dental workforce that includes 115 (3%) URM dentists and 80 (2%) URM dental hygienists noted in a 2010 Indiana Professional Licensing Agency's re-licensure survey. To meet parity in dental education, we must start early and be very intentional in supporting diverse students.

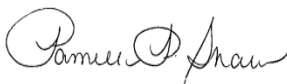
It has been demonstrated in the literature that grades K-8 are a critical foundational time for students' academic success especially in the area of science, technology, engineering, and mathematics (STEM) programming. Currently I serve as the Co-Principle Investigator for two National Science Foundation (NSF) projects designed to increase the success of African-American, Alaskan Natives, Hispanic/Latino-American, and Native-American students in STEM. The Louis Stokes Midwest Center of Excellence and the Indiana STEM Louis Stokes Alliance for Minority Participation are multi-campus collaborations supported through the NSF's *Broadening Participation* initiative, supporting students at over 600 universities and colleges across the U.S. Additionally, I strive to develop and work with existing pipeline programs statewide in efforts of cultivating future oral health care practitioners for Indiana. Grades K-8 are a key academic sector that many of my resources are dedicated, as these are the critical years for establishing educational cornerstones for students. I am confident that under Mr. Anderson's leadership,

students at the Allegiant Preparatory Academy charter school will not only meet, but also exceed Indiana's academic proficiency benchmarks as well as other indicators such as test participation and attendance rates. Mr. Anderson's successful track record of implementing innovative programming while serving in the roles as Dean of Students and head of School at Freedom Preparatory Academy in Memphis demonstrate a solid foundation in leadership within elementary education. He will work to help students here in Indianapolis increase achievement and engagement in the academic program. He has set high standards that would reflect in the classroom setting to ensure student and faculty success.

Mr. Anderson's model for the Allegiant Preparatory Academy will provide the students with a rigorous curriculum, high personal accountability markers, and community based approach requires high standards which will be key to their future success. With a successful track record established in charter school education, Mr. Anderson has served as a teacher, peer mentor for colleagues in faculty development and community engagement. His charter school proposal demonstrates a well-organized, literature based, and actionable plan that would provide the didactic preparation and civic engagement of the students enrolled. On behalf of the Indiana University School of Dentistry, I plan to partner with Mr. Anderson's as he institutes this charter school to implement a pipeline program for the students to consider dentistry as a future career.

I am confident this project will help students become competitive in the national and global marketplace, while challenging educators and policy makers to continue to raise the bar for public education. Mr. Rick Anderson has committed to this challenge by developing the proposed Allegiant Preparatory Academy. I fully endorse the efforts of Mr. Anderson whose mission is to make the students more competitive and up-to-date with his innovative curriculum and charter school. The program will lead to the success and prosperity that Indiana communities expect. Please feel free to contact me at: [ppshaw@iu.edu](mailto:ppshaw@iu.edu) or 317-274-6573 if you need additional information.

Sincerely,

A handwritten signature in cursive script that reads "Pamela P. Shaw".

Pamella P. Dale Shaw, DMD, MPH  
Associate Dean  
Office of Diversity, Equity, and Inclusion



March 6, 2017

Dear Indiana Charter School Board:

It is with confidence that I support the charter application for Allegiant Preparatory Academy and the lead founder and proposed Head of School, Rick Anderson.

Building Excellent Schools (BES) is a highly selective, nationally recognized non-profit whose flagship program, the Building Excellent Schools Fellowship, prepares outstanding candidates for urban charter school leadership. Over the last eight months I have worked closely with Rick and have observed first-hand the many strengths he brings to this work. Rick is an intelligent, driven, and well-prepared leader who understands the work ahead and is prepared to do what is necessary to lead a high-performing urban charter school for students in Indianapolis.

Prior to working with Rick in the Fellowship, I had the unique opportunity to observe his leadership in action as the Head of School at Freedom Preparatory Academy. Rick has the perfect balance of warm/strict when interacting with students and staff, holding a clear line for expectations with a true sense of joy.

Rick brings experience in instruction and charter school leadership to this work. He will also bring the experience of two month-long Residencies in high performing charter schools. Rick completed his first Residency this past January at Great Lakes Academy, one of the highest performing elementary schools in Chicago, IL. Through this residency, Rick has had exposure to strong leadership and leadership practices, as well as to rigorous curriculum and thoughtfully planned professional development.

Rick has diligently and thoughtfully approached building support for the proposed school and has assembled deep support for the proposed charter school, including the assembly and training of a diverse and accomplished founding team.

As the founder and former Head of School of Excel Academy Charter School in Chelsea, MA, I understand first-hand the high bar on must hold to found and lead a high-performing school. Rick holds the bar of excellence high for himself as well as for the founding team and does not waiver in his commitment to founding and leading a high-quality school. His ability to manage multiple priorities and engage a variety of stakeholders as well as to plan in detail an academic program that builds academic skill and character further evidences that he will be an effective school leader, responsive to the community's needs and resolute in providing a high-quality education inspired by the school's mission, devoted to the success of its students, and held fast by its ambitious goals.

We are honored to work with Rick and have complete confidence that his school leadership and the well-researched and practice-proven components of the public charter school design for Allegiant Prep will lead to strong student achievement for the children of the Westside of Indianapolis

Respectfully,

*Stephanie Patton*

Stephanie Patton, Associate Director, The Fellowship

Building Excellent Schools

spatton@buildingexcellentschools.org 617-227-4545 x210



February 13, 2017

Great Lakes Academy  
8401 S. Saginaw  
Chicago, IL 60617

Dear Indiana Charter School Board,

I am writing this letter in support of Rick Anderson, the proposed Head of School of Allegiant Prep Academy.

I am the founding Principal and Executive Director of Great Lakes Academy Charter School, a K-3 charter school in Chicago, IL and a former Building Excellent School Fellow. We serve 250 low income students, (eventually we will serve 560) and have seen tremendous results in our first three years of operation. We are seeing what is possible when students are held to high expectations, supported with targeted instruction in the foundations of math and literacy, and supported in a culture structure and joy. Our model is similar to the program Allegiant Prep is proposing to open with. At the end of our 2<sup>nd</sup> year, our Kindergarten, First and Second grade students showed growth in the top 95th-99th percentile nationally, in both reading and math, as measured on the nationally normed NWEA MAP tests. Our students are 90% FRL, Latino and African American, and reside in South Chicago or South Shore neighborhoods on the southeast side of Chicago.

I met Rick Anderson, proposed Head of School for Allegiant Prep, when he joined Great Lakes Academy for a month-long residency with in January, 2017. Mr. Anderson immersed himself in the culture of the school and worked hard with our team. During his time here, I was impressed by his ability to support teachers in building classroom management skills, provide coaching to our assistant dean of students, and to lead our students in a daily literacy tutoring session focused on developing reading comprehension skills. Mr. Anderson is focused, smart, and completely dedicated to push and support students to achieve at their highest potential.

With his years of school leadership at Freedom Prep in Memphis, and the continued training and support from Building Excellent Schools, I believe that he will open and sustain an exceptional school for the students of Indianapolis. We are excited to continue to support Mr. Anderson and the Allegiant Prep team in the coming years as Midwest partners in this work.

In closing, I support both Rick Anderson and Allegiant Prep as a new educational option of excellence in Indianapolis.

Warmly,

A handwritten signature in blue ink, appearing to read "Katherine Myers-Crum", is written over a faint, larger version of the same signature.

Katherine Myers-Crum  
Principal & Executive Director, Great Lakes Academy



Dear Indiana Charter School Board,

I am, writing this letter in support of Allegiant Prep, a proposed K-8 college preparatory school for the students and families of the Westside of Indianapolis.

As the founder and CEO of Freedom Preparatory Academy Charter Schools in Memphis, TN and a former Building Excellent School Fellow, I can attest to the power and opportunity a strong, college prep elementary experience can afford students. In our 8th year, now educating near 1300 Pre-Kindergarten through grade 12 students, we are seeing what is possible when students are given the extended time and targeted instruction in the foundations of math and literacy, similar to the program Allegiant Prep is proposing to open. At the end of our 8th year, our high school scored highest or second highest compared to all Charter Schools in the Shelby County School District: on each TN Ready Exam. Exceeding the district and state for African- American & Latino students on all TN Ready tests, our school serves a population that is more than 90% minority and more than 80% lower-income. Every day, our students prove what is possible.

Rick Anderson served as the Head of School at Freedom Prep's Westwood Elementary campus for the 14/ 15 and 15/16 school years. Mr. Anderson proved to be an invaluable asset to the Freedom Prep and Memphis community. I knew Mr. Anderson's presence was impactful to the community by the continued interest and support parents have shown during his tenure and even after his departure.

In addition to first-hand experience as a Head of School, Mr. Anderson is currently a Building Excellent School Fellow honing his expertise and guiding his passion for education. Mr. Anderson will have the continued support of Freedom Prep in his endeavors.

Again, I support Allegiant Prep as a new educational option in Indianapolis. It is my hope and desire that the school should be granted a charter and have the opportunity to welcome their first class of Kindergarten and 1st grade students in the fall of 2018.

Sincerely,

Roblin J. Webb

February 6, 2017

To Whom It May Concern,

I am writing this letter in strong support of the charter application for Allegiant Prep, a proposed K-8 college preparatory public charter school in Indianapolis, IN. I am also emphatically supportive of the proposed school's leader, Rick Anderson, who began his career in education as an elementary school teacher at Memphis College Prep, a K-5 charter school in Memphis, TN.

As the founder of Memphis College Prep, I have had the opportunity to launch a new school from the ground up when we began in August 2010 until transitioning from my role as Executive Director in July 2016. It is an equally daunting, yet exciting opportunity to provide more students in Memphis with a rigorous, college preparatory education beginning in Kindergarten. I firmly believe that we need more strong options for families that provide this same focus and the right leadership to make it happen. Being very familiar with the school design of Allegiant Prep and having worked directly with Mr. Anderson for two years as his direct supervisor, I am incredibly confident in his ability to execute on the mission and vision of the school for the students of Indianapolis.

The mission of Allegiant Prep is to provide students in grades K-8 with the rigorous academics, character development, and a commitment to community necessary for college success and a life of positive action. I strongly believe that Indianapolis needs Allegiant Prep to bring these opportunities to more students and families. The school will provide students with outstanding academic and character foundation necessary to succeed in today's challenging and dynamic world.

I know Mr. Anderson is committed to creating and sustaining a high-quality college preparatory elementary and middle school in his hometown of Indianapolis. From day one, he was one of our strongest teachers, not only in results, but in an incredible work ethic and commitment to getting it right. Mr. Anderson is now a Fellow with nationally recognized non-profit Building Excellent Schools (BES). As a former BES fellow myself, I know firsthand the strength of the program and its ability to found and sustain schools of the highest academic quality across the country.

I am incredibly excited to support the charter application for Allegiant Prep. On behalf of students across our country, it is my great hope and desire that the school be granted a charter and open in the fall of 2018. If you have any questions or concerns, please do not hesitate to contact me directly.

Sincerely,

A handwritten signature in black ink that reads "Michael Whaley". The signature is written in a cursive style with a large, stylized initial "M".

Michael Whaley  
Founder  
Memphis College Prep Elementary School  
901.857.8030  
[michaelgwhaley@gmail.com](mailto:michaelgwhaley@gmail.com)



March 17, 2017

To Whom It May Concern:

I am enthusiastic to support Allegiant Preparatory Academy Charter School and lead Founder and Proposed Head of School Rick Anderson. A native to Indianapolis, the difficult work of opening a high performing school for students in Indianapolis is a personal mission for him. He has spared no expense and shied from no challenge to prepare himself fully to open a school of excellence for the students and parents of the West Side. He has extensive experience in the classroom and in leadership roles at a high performing charter school in Memphis. This experience is an incredible asset to our city and students.

Rick has a necessary close attention to detail, be it the color of floor tiles or the correct pronunciation of digraphs in a guided reading phonics lesson. His pedagogical knowledge in all content areas allows him to confidently provide feedback to teachers so that they can most effectively teach and grow. His tremendous strengths include a humility that accepts feedback at all times and seeks constant growth.

Recently, I visited him while he was at a residency in Chicago. Rick asked me to observe him and give feedback while he worked with a group of students who were reading below grade level. He implemented feedback that I gave him in the moment, while still in front of the students, and eagerly took notes as we debriefed his lesson. Further, he asked that I meet with the Principal of the school to gather further information about what he can improve. Rick works daily to become a better leader. His eyes are wide-open to how difficult it is to open and run a high-performing school and unwavering in making sure he is prepared to do so.

In my role as Director of Leadership Development, I will support Rick and Allegiant Prep Academy as the coach through Follow-on Support with Building Excellent Schools. My prior experience as the founder and Principal for KIPP Delta Collegiate and then as the Chief Academic Officer for KIPP Delta will support in the work ahead of the Allegiant Preparatory Academy team.

It is without hesitation that I recommend Allegiant Prep and Mr. Anderson. I have seen him teach, and I have seen him lead. His school will be a showcase of what students can do in our city and for the country.

Respectfully,

A handwritten signature in black ink, appearing to read "LVDW", followed by a long horizontal line extending to the right.

Luke Van De Walle  
Director of Leadership Development, Building Excellent Schools



Dear Indiana Charter School Board:

My name is Rob R Love and I'm the Director of School Services of the Network for Quality Education. The Network for Quality Education provides support for services and communication to charter and non-public schools in the State of Indiana. The Network is fully committed to ensuring that all schools provide a quality education for Indiana students especially charters and non-public schools.

It is my pleasure to provide a letter of support for the approval of Allegiant Preparatory Academy Charter School, led by founder Rick Anderson. Mr. Anderson, as well as members of his dynamic founding board, are working diligently to build local partnerships to ensure doors open at Allegiant Prep in the Fall of 2018. Mr. Anderson brings a track record of effectiveness to this work serving as an educator in Memphis, TN. Being from Indy and as a state licensed educator, I am inspired by Mr. Andersons' focus on his hometown and work to ensure Allegiant Prep is a quality educational option focused on positive academic outcomes for our families and students.

Sincerely,

A handwritten signature in black ink, appearing to read 'Rob R Love', with a long horizontal flourish extending to the right.

Rob R Love, J.D.

Director of Student Services

Network for Quality Education

One day, all children in this nation will have the opportunity to attain an excellent education.



January 17, 2017

Mr. Joshua Owens  
Chair, Indiana Charter School Board  
143 West Market Street, Suite 300  
Indianapolis, IN 46204

Dear Mr. Owens:

It is my pleasure to write a letter in support of the proposal Allegiant Preparatory Academy has presented to you seeking approval to open a K-8 school in Indianapolis. As the Executive Director of Teach For America – Memphis, I had the opportunity to work with founder Rick Anderson as he began his career as an educator. He was an extraordinary teacher and consistently led with a system of values that enabled him to support his students in the ways they deserved emotionally, lead them to rigorous academic outcomes (in fact, ensuring that, though they entered his classroom multiple grade levels behind, they were caught up when they left) and position them for their future success. Additionally, I served on the board of the charter school management organization where Rick later worked as an assistant principal and principal. In that capacity, I saw him continue to lead with relationships first and with a vision of excellence for every child. He never once backed down from a challenge and built a team around him who loved their students, operated in partnership with parents, and achieved excellent results in the face of the challenges that generational poverty brings to the lives of students. In Rick, you are getting a remarkable and proven leader of both adults and students; someone who is values-driven; believes wholeheartedly that every child can achieve – and should be positioned to achieve – their fullest potential; and believes that it's the responsibility of us adults around them to design schools and systems that support and affirm their dreams.

Based on Rick's past record of success and knowing him well, I believe that Allegiant Preparatory Academy will add to the growing number of schools in your community that believe that every child can achieve at the highest level and that, when given the right supports and in partnership with many, students can transcend what demographics would otherwise predict for their futures and that we can all create a different paradigm of schooling that works with, not against, students' success.

In pursuit of equity for its students, Allegiant Preparatory Academy will provide a college preparatory curriculum, a structured learning environment that is joyful as well as rigorous, a focused schedule to advance literacy, a focus on a service-orientation in the community, and frequent partnership, engagement and communication with students' families. It is a school that will be defined by high expectations for all of its students just as much as its joy, care, and love.

Upon reviewing the application, I hope you will agree that Allegiant Preparatory Academy will make an excellent addition to school options for your students and their families.

Sincerely,

A handwritten signature in black ink that reads "Athena Turner". The signature is fluid and cursive.

Athena Turner  
Executive Director  
Teach For America - Memphis



AN AMERICORPS PROGRAM

March 24, 2017

Dear Members of the Indiana Charter School Board,

This letter is in support of Allegiant Prep as they are working to establish a free-standing K-8 charter school in Indianapolis.

I strongly support Allegiant Prep's commitment to provide students and families with a safe, structured, and joyful culture. I agree that the path to a successful adulthood starts with a solid education and Allegiant Prep pledges to provide this to all learners. It is admirable and necessary that the school mission incorporates character development in addition to rigorous academics.

My personal experience as an 8<sup>th</sup> grade math teacher and former adult high school educator has opened my eyes to the need for a topnotch and rigorous education for our youth. I have worked with adults that decided to drop out of high school because they were not prepared for the mathematics classes in the 9<sup>th</sup> through 12<sup>th</sup> grades. I now see many 8<sup>th</sup> grade students that are below level in their mathematics but have been passed on from class to class. Allegiant Prep and its high expectations with a whatever-it-takes approach would provide these students the high quality education they deserve. It would also put them in a position to thrive in high school and post-secondary careers or college to help better our city and have a positive impact on our community.

Please accept and consider this letter of support. With the support of a highly respected organization such as Building Excellent Schools and the experience of Rick Anderson, Allegiant Prep is well positioned to help our youth.

Sincere regards,

Karen Morley

8<sup>th</sup> Grade Mathematics Instructor

Eastwood Middle School

March 12, 2017

To: Indiana Charter School Board

Subj: Allegiant Preparatory Academy

Dear Indiana Charter School Board:

I have had the pleasure of speaking with the founder Mr. Rick Anderson regarding his career as an educator and passion for students' success. Based on Mr. Anderson's past experiences and belief in academic achievement, it is refreshing to hear his vision of excellence for students. As an African American, single mother who resides in Haughville many are faced with the reality of living in a low-income area; improvised with a high crime rate and an average household income of less than \$18, 000; 41% of residents lack a high school degree or equivalent. The current school system is failing our children and due to lack of sufficient funds, private schools are not an option for most.

As parents, we do our best at setting a solid foundation for life but we also understand that today's society is becoming more challenging; providing children with values at home and at school allows a child a greater opportunity to see and live excellence. I am pleased that Allegiant Preparatory Academy is focused on providing higher level curriculum in a well-structured atmosphere, involving families within the framework and instilling values to help children develop responsibility, integrity and respect. I appreciate Mr. Anderson's epitome of goodness, humility and I had the pleasure of hearing about his background and life achievements;

he has tackled many obstacles and prevailed. I believe he deserves the opportunity to share his gift(s) with others while developing leadership qualities in others. In addition, he is capable of facing the challenges ahead and understands the responsibilities before him. I am more than pleased with his sincerity, strong sense of responsibility and dedication which are characteristics that will undoubtedly help students in being successful. Without any hesitation, I believe that Mr. Anderson will succeed and I endorse Allegiant Preparatory Academy as a new educational option for families in the Haughville and surrounding area.

Respectfully,

Dr. Toya R. Crain  
Haughville Resident, District 11  
craintoya@yahoo.com  
630-803-6926



**Strengthening  
nonprofits and  
the communities  
they serve.**

*Sharing a mission of change*

**Illinois**

333 South Wabash Ave.  
Suite 2800  
Chicago, IL 60604  
312 629 0060

**Indiana**

The Platform  
202 East Market St.  
Indianapolis, IN 46204  
317 860 6900

**Michigan**

3011 West Grand Blvd.  
Suite 1715  
Detroit, MI 48202  
313 309 7825

**Minnesota**

527 Marquette Ave.  
Suite 1150  
Minneapolis, MN 55402  
612 814 0310

**Missouri**

911 Washington Ave.  
Suite 203  
St. Louis, MO 63101  
314 588 8840

**Ohio**

500 South Front St.  
Suite 125  
Columbus, OH 43215  
614 484 1811

**Wisconsin**

215 North Water St.  
Suite 225  
Milwaukee, WI 53202  
414 563 1100

March 22, 2017

Mr. James Betley  
Indiana Charter School Board  
143 West Market Street, Suite 300  
Indianapolis, IN 46204

Mr. Betley,

This letter confirms IFF’s commitment to partner with Allegiant Preparatory Academy as they open their first school in Indianapolis.

IFF is a mission-driven lender, real estate consultant, and developer that helps communities thrive by creating opportunities for low-income communities and people with disabilities. Through a Walton Family Foundation grant, IFF is able to provide a range of grant-funded services to schools like Allegiant Prep to ensure these schools have the tools and resources necessary to launch quality schools.

We are excited to partner with Allegiant Prep in the process of securing a sustainable facility. Our partnership started last year when we completed the first phase of facility feasibility analysis, including a space needs analysis, market and demographics analysis, and evaluation of financing scenarios. Upon receipt of authorization, IFF will advise on lease negotiations, assess facility conditions and propose build-out scenarios for private facilities. We will further engage them in providing due diligence and owner's representation services as they work to secure their permanent site.

We look forward to partnering with Mr. Anderson of Allegiant Prep to increase the quality of educational opportunities for students in Indianapolis.

Sincerely,

Nate Lichti  
Director of Real Estate Services – Indiana  
IFF

**Indianapolis Drifters, Inc. Chapter**

March 15, 2017

President  
Indianapolis Drifters, Inc. Chapter

Dear Indiana Charter School Board,

This letter is in support of Allegiant Prep Academy, as they seek to operate under charter guidelines to serve families on the Westside of Indianapolis. Drifters, Inc. is a national organization that has been operating for over sixty years. The Drifters national theme is "Strengthen our Families to Build Better Communities: Save our children, Assist our seniors." The Drifters understand and advocate for access to quality education options for all children regardless of socioeconomic status or zip code.

Throughout the year, the Drifters are involved at the local and national level in advocating and fundraising for the importance of education. At each annual national convention, the Drifters award a scholarship to help a deserving student from one of our chapter cities to attend the college or university of their choice. Additionally, the Drifters have lifetime memberships in the National Association for The Advancement of Colored People (NAACP) and the National Urban League, which keep the organization informed on challenges facing minorities on the national level as well as in individual communities.

The Indianapolis Drifters Chapter is always looking for opportunities to support individuals and organizations trying to improve the Indianapolis community. Now more than ever it is clear that the need for quality education options nationally, and particularly here in Indianapolis, is the key to a promising and successful futures for our children. We support the efforts of Rick Anderson and the founding board of Allegiant Prep Academy in establishing this charter school for Indianapolis. We are hopeful to see the charter school come to fruition under the leadership of Rick Anderson, who has an excellent track record as an educator. Additionally, the founding board's motivation and well-rounded experience will be an asset to assisting Rick in ensuring a successful charter school.

We are excited to support Allegiant Prep Academy as they strive to bring a quality education option to the Westside of Indianapolis through rigorous instruction, character development and commitment to community.

Yours truly,

Dr. Vivian Howard

Indianapolis Drifter, Inc. – President



**ALLEGIANT PREP**  
ACADEMY

# Attachment 10

Governance Documents





**ALLEGIANT PREP**  
ACADEMY

1. Receipt for cost of filing and documentation of certified check payable to United States Treasury.

▲ REGIONS

**Personal Money Order Receipt**

2102942333

Date: 03/01/2017 9:40 A  
Branch: IN03018 Teller#: 04  
Money Order Purchase  
Amount: \$850.00

---

SEE PURCHASER'S AGREEMENT ON REVERSE SIDE



**ALLEGIANT PREP**  
ACADEMY

2. Form 1023 mailed March 1, 2017.



**FedEx Office**<sup>SM</sup>

Address: 7800 E 96TH ST  
FISHERS  
IN 46038  
Location: MZZKK  
Device ID: -BTC01  
Transaction: 890159991548

<b>FedEx Express Saver</b>		
785764120345	0.7 lbs. (S)	12.00
Direct signature required		
Declared Value	100	
Shipment subtotal:		\$12.00
Total Due:		\$12.00
(S) CreditCard:		\$12.00
*****2526		

H = Weight entered manually  
S = Weight read from scale  
I = Taxable item

Terms and Conditions apply. See  
[fedex.com/us/service-guide](http://fedex.com/us/service-guide) for details.

Visit us at: [fedex.com](http://fedex.com) <sup>®</sup>  
Or call 1.800.GoFedEx  
1.800.463.3339

March 1, 2017 10:59:46 AM



**3. Form 1023 received March 2, 2017.**

3/6/2017

Track your package or shipment with FedEx Tracking

**785764120345**

Ship date:

**Wed 3/01/2017**

Indianapolis, IN US



**Delivered**

Signed for by: M.ELLIS

Actual delivery:

**Thu 3/02/2017 9:18 am**

COVINGTON, KY US

**Travel History**

Date/Time	Activity	Location
<b>3/02/2017 - Thursday</b>		
9:18 am	Delivered	COVINGTON, KY
8:23 am	On FedEx vehicle for delivery	ERLANGER, KY
7:41 am	At local FedEx facility	ERLANGER, KY
4:33 am	Departed FedEx location	INDIANAPOLIS, IN
<b>3/01/2017 - Wednesday</b>		
11:33 pm	Arrived at FedEx location	INDIANAPOLIS, IN
10:52 pm	Left FedEx origin facility	INDIANAPOLIS, IN
8:21 pm	Picked up	INDIANAPOLIS, IN
10:58 am	Picked up	FISHERS, IN
	Tendered at FedEx Office	
10:02 am	Shipment information sent to FedEx	

**Shipment Facts**

Tracking number	785764120345	Service	FedEx Express Saver
Weight	1 lbs / 0.45 kgs	Signature services	Direct signature required
Delivered To	Receptionist/Front Desk	Total pieces	1
Total shipment weight	1 lbs / 0.45 kgs	Terms	Shipper
Packaging	FedEx Envelope	Special handling section	Deliver Weekday, Direct Signature Required
Standard transit	3/06/2017 by 4:30 pm		



Customer Service

Business Services

Shipments

Follow FedEx

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

(00) OMB No. 1545-0058

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**

1 Full name of organization (exactly as it appears in your organizing document)		2 c/o Name (if applicable)	
<b>Allegiant Preparatory, Inc.</b>		<b>Rick Anderson</b>	
3 Mailing address (Number and street) (see instructions)	Room/Suite	4 Employer Identification Number (EIN)	
<b>8928 Ashford Castle Drive</b>	<b>1425</b>	<b>81-3719222</b>	
City or town, state or country, and ZIP + 4		5 Month the annual accounting period ends (01 - 12)	
<b>Indianapolis, In 46250</b>		<b>June</b>	
6 Primary contact (officer, director, trustee, or authorized representative)		b Phone: <b>317-619-9464</b>	
a Name: <b>Rick Anderson</b>		c Fax: (optional)	
7 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 type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
8 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"/> Yes <input checked="" type="checkbox"/> No			
9a Organization's website: <b>to be established</b>			
b Organization's email: (optional) <b>to be established</b>			
10 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"/> Yes <input checked="" type="checkbox"/> No			
11 Date incorporated if a corporation, or formed, if other than a corporation. (MM/DD/YYYY) <b>08 / 29 / 2016</b>			
12 Were you formed under the laws of a foreign country? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," state the country.			

**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): Bylaws (page 1, Article 1.3)
- 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. Bylaws (page 1, Article 1.6)
- 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)
*See attachment			

**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)
*See attachment			

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**

- |   |   |
|---|---|
| <input checked="" type="checkbox"/> mail solicitations              | <input type="checkbox"/> phone solicitations  |
| <input checked="" type="checkbox"/> email solicitations             | <input checked="" type="checkbox"/> accept donations on your website                      |
| <input checked="" type="checkbox"/> personal solicitations          | <input checked="" type="checkbox"/> receive donations from another organization's website |
| <input type="checkbox"/> vehicle, boat, plane, or similar donations | <input checked="" type="checkbox"/> government grant solicitations                        |
| <input checked="" type="checkbox"/> foundation grant solicitations  | <input checked="" type="checkbox"/> 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 <b>close connection</b> with any organizations? If "Yes," explain.   | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No |
| 16 | Are you applying for exemption as a <b>cooperative hospital service organization</b> under section 501(e)? If "Yes," explain.  | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No |
| 17 | Are you applying for exemption as a <b>cooperative service organization of operating educational organizations</b> under section 501(f)? If "Yes," explain.  | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No |
| 18 | Are you applying for exemption as a <b>charitable risk pool</b> under section 501(n)? If "Yes," explain.   | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No |
| 19 | Do you or will you operate a <b>school</b> ? If "Yes," complete Schedule B. Answer "Yes," whether you operate a school as your main function or as a secondary activity.   | <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No |
| 20 | Is your main function to provide <b>hospital or medical care</b> ? If "Yes," complete Schedule C.  | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No |
| 21 | Do you or will you provide <b>low-income housing</b> or housing for the <b>elderly or handicapped</b> ? If "Yes," complete Schedule F.   | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No |
| 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. | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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 <u>2016</u> To <u>2017</u>	(b) From <u>2017</u> To <u>2018</u>	(c) From <u>2018</u> To <u>2019</u>	(d) From .....	
Revenues	<b>1</b> Gifts, grants, and contributions received (do not include unusual grants)	0	325000	967804		
	<b>2</b> Membership fees received	0	0	0		
	<b>3</b> Gross investment income	0	0	0		
	<b>4</b> Net unrelated business income	0	0	0		
	<b>5</b> Taxes levied for your benefit	0	0	0		
	<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)	0	0	0		
	<b>7</b> Any revenue not otherwise listed above or in lines 9-12 below (attach an itemized list)	0	0	0		
	<b>8</b> Total of lines 1 through 7	0	325000	967804		
	<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)	0	0	0		
	<b>10</b> Total of lines 8 and 9	0	325000	967804		
<b>11</b> Net gain or loss on sale of capital assets (attach schedule and see instructions)	0	0	0			
<b>12</b> Unusual grants	0	0	0			
<b>13</b> Total Revenue Add lines 10 through 12	0	325000	967804			
<b>14</b> Fundraising expenses	0	0	0			
<b>15</b> Contributions, gifts, grants, and similar amounts paid out (attach an itemized list)	0	0	0			
<b>16</b> Disbursements to or for the benefit of members (attach an itemized list)	0	0	0			
Expenses	<b>17</b> Compensation of officers, directors, and trustees	0	85000	86700		
	<b>18</b> Other salaries and wages	0	15375	372000		
	<b>19</b> Interest expense	0	0	0		
	<b>20</b> Occupancy (rent, utilities, etc.)	0	600	217300		
	<b>21</b> Depreciation and depletion	0	0	0		
	<b>22</b> Professional fees	0	12500	60000		
	<b>23</b> Any expense not otherwise classified, such as program services (attach itemized list)	0	4150	189730.46		
	<b>24</b> Total Expenses Add lines 14 through 23	0	117625	925730.46		

**Part IX Financial Data (Continued)**

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

Year End:

Assets		(Whole dollars)
1	Cash	0
2	Accounts receivable, net	0
3	Inventories	0
4	Bonds and notes receivable (attach an itemized list)	0
5	Corporate stocks (attach an itemized list)	0
6	Loans receivable (attach an itemized list)	0
7	Other investments (attach an itemized list)	0
8	Depreciable and depletable assets (attach an itemized list)	0
9	Land	0
10	Other assets (attach an itemized list)	0
11	Total Assets (add lines 1 through 10)	0
Liabilities		
12	Accounts payable	0
13	Contributions, gifts, grants, etc. payable	0
14	Mortgages and notes payable (attach an itemized list)	0
15	Other liabilities (attach an itemized list)	0
16	Total Liabilities (add lines 12 through 15)	0
Fund Balances or Net Assets		
17	Total fund balances or net assets	0
18	Total Liabilities and Fund Balances or Net Assets (add lines 16 and 17)	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)

FREDERICK (RICK) ANDERSON 2/27/17  
 (Type or print name of signer) (Date)

Incorporator  
 (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

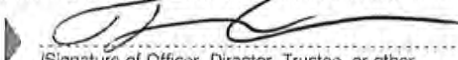
**Part XI User Fee Information**

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)

Frederick (Rick) Anderson  
(Type or print name of signer)

2/27/17  
(Date)

Incorporator  
(Type or print title or authority of signer)

**Reminder:** Send the completed Form 1023 Checklist with your filled-in-application.

**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





# Form 1023 Checklist

## (Revised December 2013)

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

---

**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) \_\_\_\_\_
  - Location of Dissolution Clause from Part III, line 2b or 2c (Page, Article and Paragraph Number) or by operation of state law state law
- 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

**Page 2, Part IV**

Allegiant Preparatory, Inc. Narrative Description of Your Activities

**1. What is the activity**

Allegiant Prep is a tuition-free, public charter school for Kindergarten through Grade 8 students.

Incorporator

**2. Who conducts the activity?**

Upon authorization in May 2017, Allegiant Prep will be governed by a Board of Directors. These individuals will oversee the financial health and academic accountability of the school and uphold all components of charter application.

**3. When is the activity conducted?**

Allegiant Prep is a proposed charter school. The Indiana Charter School Board will make a final decision by 5/25/2017 whether or not the charter is granted. The school will open for students in August 2018.

**4. Where is the activity conducted?**

Allegiant Prep has not yet signed a lease or purchased a permanent facility, however has identified the 46222 zip code of Indianapolis as the target community.

**5. How does the activity further your exempt purposes?**

Allegiant Prep will provide education to children, some of whom may be from low-income backgrounds.

**6. What percentage of your total time is allocated to the activity?**

Allegiant Prep will require oversight and management daily and will be 100% of the Head of Schools time.

**7. How is the activity funded?**

As a public school, Allegiant Prep is funded primarily through Indiana taxpayer dollars, however does also receive federal monies, grant allocations and private donations.

**8. List any alternate names.**

- Allegiant Preparatory Academy Charter School (official name on school documents)
- Allegiant Prep (day-to-day name)

**Page 2, Part V, Question 1a**

<b>Name</b>	<b>Title</b>	<b>Mailing Address</b>	<b>Compensation</b>
Frederick (Rick) Anderson	Head of School and Ex-Officio Board Member	8928 Ashford Castle Drive Indianapolis, IN 46250 #1425	\$85,000
Keeanna Warren *	Member, Board of Directors	11513 Scheel Lane, Carmel, IN 46032	\$0
Janice Howard*	Member, Board of Directors	PO Box 68437 Indianapolis, IN 46268	\$0
Tony Pearson*	Member, Board of Directors	4415 Viva Lane, Indianapolis, IN 46239	\$0
Brianna Saunders*	Member, Board of Directors	1045 W. 73 <sup>rd</sup> St. Indianapolis, IN 46260	\$0
Charlie Schlegel*	Member, Board of Directors	8266 Washington Blvd. Indianapolis, IN 46240	\$0
Clifton Snorten*	Member, Board of Directors	7175 Jessman Road W. Drive Apt. F Indianapolis, IN 46256	\$0
Alyssa Howard*	Member, Board of Directors	240 W. Hampton Drive Indianapolis, IN 46208	\$0

\*Upon authorization of the Indiana Charter School Board and Allegiant Prep being chartered (projected May 25, 2017), the above listed founding team members have agreed to serve on the Board of Directors. Below are brief descriptions of their credentials and resumes can be provided upon request.

**Alyssa Howard, CPA, PricewaterhouseCoopers** Alyssa Howard is a CPA at the professional services firm, PricewaterhouseCoopers, in the Indianapolis Core Assurance practice. Alyssa has extensive experience in accounting, financial statement review and project management in her role serving clients with both national and international operations in the industrial manufacturing, financial services, food service and aerospace industries. Additionally, Alyssa is involved in PwC's youth education and diversity initiatives, participating in financial planning and mentoring in the Indianapolis area. Alyssa holds a BA in Accounting, magna cum laude, from Howard University.

**Janice Howard, Senior Business Analyst-HR, Angie's List** Janice Howard is a Senior Business Analyst supporting HR and Payroll at Angie's List. With over 20 years of experience, Ms. Howard has an extensive background in all areas of Human Resources including Recruiting, Employee Relations, Benefits, Compensation, Performance Management, and Human Resource Information Systems. She holds a BS in Business Information Systems and a MBA with a specialization in Human Resources from Indiana Wesleyan University.

**Tony Pearson, Associate General Counsel, Indiana University Health** Tony Pearson is an Associate General Counsel with Indiana University Health. Mr. Pearson primarily provides legal counsel on a variety of transactional matters for the hospital system's physician group and affiliate organizations. In this capacity, he supports over thirty clinical subspecialties, assisting physician leadership with employment agreements, medical directorships, and professional service contracts. Additionally, Mr. Pearson is involved heavily with process improvement efforts to ensure a streamlined approach to

physician onboarding while ensuring adherence to the health system's culture of compliance. Mr. Pearson is also a Lieutenant in the United States Navy Reserve, where he serves as Assistant Officer-In-Charge for Expeditionary Medical Facility - Detachment R. In this capacity, he provides oversight to the unit's sailors charged with ensuring appropriate training requirements for the unit are met and manages the delivery of medical services to sailors and marines drilling at Navy Operational Support Center – Indianapolis. Mr. Pearson earned his BS in Biology and MPH with a concentration in Health Policy and Management from Florida Agricultural and Mechanical University. He earned in JD with a concentration in Health Law from the Indiana University McKinney School of Law.

**Brianna Saunders, Associate Director of Community Engagement, Alzheimer's Association** Brianna Saunders is from Indianapolis and received her Bachelor of Science in Business Management and a Master of Arts in Public Affairs from Indiana Wesleyan University. She is the Associate Director of Community Engagement for the Alzheimer's Association. Prior to joining the Alzheimer's Association, Brianna served in business, management and fundraising at the American Cancer Society and has worked in nonprofit for over 10 years and served in many of volunteer roles throughout the community.

**Charlie Schlegel, Educational Consultant, Calsoyas Group** Charlie Schlegel currently serves as an independent education consultant, working on several projects with Mass Insight Education, Marian University and school districts in both Indianapolis and Minneapolis. Prior to his current position, Charlie served as the Superintendent of the Community Charter Network (CCN), a small, group of public charter schools in Indianapolis. Started in July 2012, CCN schools serve nearly 1200 students, K-12. Prior to leading CCN, Schlegel served as an upper elementary school teacher in New Orleans for four years – the first two of which were through the *Teach For America* program. He was also an early leader in the development of *Citizen Schools*, a Boston-based after-school program focused project-based learning and civic involvement. For nearly eight years, Schlegel served as the principal of *Wayland Middle School*, a traditional public school just west of Boston, and the *Avondale Meadows Academy*, a K-5 charter school in Indianapolis. Lastly, Charlie and his wife, Mindy, are also the proud parents of three daughters (ages 11, 10 and 7) – who, together, keep their parents busy, humble and appreciative of the importance of good schools.

**Clifton Snorten, Office Manager, U.S. House of Representatives** Clifton Snorten is the Scheduler/Office Manager for Congressman André Carson in Indiana's 7th Congressional District. Within the Indianapolis community, Mr. Snorten also serves as the Project Director for the All Souls CDF Freedom School program and Board President of the Bloom Project, Inc. Previously, he worked in the area of Student Affairs at Butler University and Ball State University. Mr. Snorten holds a BS in English Education from Indiana University and an MA in Student Affairs Administration in Higher Education from Ball State University.

**Keeanna Warren, Director, The Excel Center Meadows** Keeanna Warren is the Director of The Excel Center Meadows in Indianapolis, Indiana. Prior to her current role, Mrs. Warren served as a graduate coach, lead teacher, and college transition counselor for The Excel Center. Keeanna also served as an elementary school teacher for Washington Township and math and elementary school teacher for Andrew J. Brown Academy. Mrs. Warren has a passion and desire to ensure that all students in Indianapolis, Indiana have access to a quality education. Mrs. Warren received a bachelor's degree in

Allegiant Preparatory, Inc. EIN: 81-3719222

Sociology from Purdue University and a master's degree in teaching from Marian University, where she was a part of the Turnaround School Leadership program.

**Page 3, Part V, Question 1c**

<b>Name</b>	<b>Title</b>	<b>Mailing Address</b>	<b>Compensation</b>
Indiana Network of Independent Schools (INISchools)*	Back office provider hosting high-quality services that enable school administrators to improve cost efficiency and student achievement	1635 N. Michigan St. Indpls, IN 46222	\$65,000 (approx..)

\*Upon authorization of the Indiana Charter School Board and Allegiant Prep being chartered (projected May 25, 2017), the Board of Directors will review and vote on a contract with INISchools. INISchools is well-known provider of back office services (performance analysis, finance and accounting, state compliance and reporting, and special education) to independent and small charter schools in the state of Indiana.



Allegiant Preparatory, Inc. EIN: 81-3719222

**Page 5, Part VI, Question 1a**

Allegiant Prep will provide a quality, college preparatory education to all enrolled K-8 students.

**Page 6, Part VIII, Question 4a**

Allegiant Prep, Inc. Fundraising Program

- **Mail solicitations**  
Allegiant Prep will utilize direct mail services for purposes of recruitment, and promotion of events and activities, resulting in increased awareness of the school and potential donations.
- **Email solicitations**  
Allegiant Prep will utilize email as a means to quickly distribute information about the school including particular fundraising needs. One purpose might be donations to provide transportation for our students.
- **Personal solicitations**  
Individuals who have expressed support for Allegiant Prep will be approached individually about financial support for the school.
- **Foundation grant solicitations**  
Allegiant Prep staff will be attuned to grant opportunities from a variety of sources and will be encouraged to submit proposals for funding when the grant opportunity will further the mission of the school.
- **Accept donations on the website**  
When Allegiant Prep's website goes live in June 2017, there will be a secure way for visitors to make donations to the school.
- **Receive donations from another organization**  
Allegiant Prep will continue to seek our partnerships with local agencies and likely have organizations and businesses who provided donated services to the students/staff.
- **Government grant solicitations**  
Assuming the government grant furthered our mission and aligned with our educational/organizational efforts, Allegiant Prep would indeed apply.

Allegiant Preparatory, Inc. EIN: 81-3719222

**Page 6, Part VIII, Question 4d**

All fundraising will take place in Indianapolis, IN and will be for Allegiant Prep.

**Page 9, Part IX**

Allegiant Prep Inc. Financial Data

School year 2016-2017: \$0

School year 2017-2018: Year 0 (Planning Year) July '17 – June '18

Line	Explanation
1	\$325,000 from Walton Family Foundation
17	Head of School's salary + benefits (\$85000) Number based on salary beginning 9/16
18	Salary + benefits for part-time School Operations Manager
20	Paying for office space
22	Professional fees to INISchools, the back office provider
23	Office supplies: 400 Board expenses: 750 Printing: 2000 Postage: 1300

School year 2017-2018: Year 1 (Kindergarten and 1<sup>st</sup> grade, 120 students)

Line	Explanation
1	State and Federal dollars
17	Head of School's salary (\$85,000) + benefits (\$14,700)
18	Salary and benefits for School Operations Manager, Office Manager, Student Supports Coordinator, 6 teachers
20	Includes: rent, gas/electric, water/sewer, grounds keeping, maintenance service, custodial, waste disposal, security system
22	Professional fees to INISchools (back office provider): \$60,000
23	Furniture & Equipment: \$50,000 Instructional Supplies: \$48,508 Support Supplies/Resources: \$23,060 Board Expenses: \$6,480 Printing: \$2,880 Travel: \$1,500 Postage: \$960 Food Service: \$69,042.46 Student uniforms: \$2,400 Telephone: \$2,500 Student Information System: \$2,400

Allegiant Preparatory, Inc. EIN: 81-3719222

**Page 14, Section I, Question 1b**

Allegiant Preparatory, Inc. School Description

Allegiant Preparatory Charter School is a public, tuition free proposed charter school for Kindergarten through 8<sup>th</sup> grade students in Indianapolis. Allegiant Prep will open in August of 2018 to 60 Kindergarten and 60 First Grade students and will continue to add a grade level of 60 students a year until full capacity in 2027.

Allegiant Prep's mission:

Allegiant Preparatory Academy Charter School educates all students in grades K-8 with rigorous academics, character development, and commitment to community necessary for college success and a life of positive action.

**Page 14, Section I, Question 8**

Upon authorization of the Indiana Charter School Board and Allegiant Prep being chartered (projected May 25, 2017), the Board of Directors will review and vote on a contract to work with INISchools, a back office provider supporting small and independent charter schools in the fields of finance, accounting, compliance, and special education population. At this point, Allegiant Prep has been in communication with INISchools around services provided and support in the authorization process. A formalized agreement will not be put into place until after May 2017. In choosing INISchools as an organization to work with, Circle City Prep talked to other independent, small charter schools in the city who consistently recommended the services of INISchools. At this point, there are no other organizations in the state that provide back office support to charter schools.

Allegiant Preparatory, Inc. EIN: 81-3719222

**Page 14, Section II, Question 1**

**Allegiant Prep, Inc. Non-Discrimination Policy**

Allegiant Preparatory Academy Charter School provides equal opportunities without regard to race, color, national origin, gender, age, disability, sexual orientation, family situation, religion, political affiliation, or veteran status in its educational programs and activities. This includes, but is not limited to, admissions, educational services, financial aid, and employment. Any complaints or allegations of any violation of this statement should be immediately directed in writing to: Rick Anderson (or his designee), Allegiant Preparatory Academy Charter School Head of School.

**Page 15, Section II, Question 5**

**Allegiant Preparatory, Inc. Racial Composition**

Allegiant Preparatory Charter School is a proposed charter school and will not open to student until the 2018-2019 school year.

Racial Category	Student Body Current Year (17-18 school year)	Student Body Next Year (18-19 school year) <sup>1</sup>	Faculty Current Year (17-18 school year)	Faculty Next Year (18-19 school year) <sup>2</sup>	Administrative Staff Current Year (17-18 school year)	Administrative Staff Next Year (18-19 school year)
Enrollment	0	120	0	120	0	120
African American	0	75% (84)	0	1	0	1
American Indiana or Alaska Native	0	0	0	0	0	0
Asian	0	0	0	0	0	0
Native Hawaiian or Other Pacific Islander	0	0	0	0	0	0
Hispanic	0	15% (18)	0	0	0	1
White	0	10% (12)	0	5	1	2

Table A: Public Elementary Schools on the Westside

School Name & Address	# of Students (2015-2016)	Grades served	2016 Grade	IRead3 Pass % (2015)	Both ISTEP Pass % (2015) 3/4/5	Racial Demographics	% FRL	% Special Edu. and % ELL
Stephen Foster	573	PK-6	D	87%	24/17/28	25% Black 54% Hispanic	77%	16% / 0%
Elder W. Diggs	481	PK – 6	F	78%	19/0/0	79% Black 11% Hispanic	84%	22% / 0%

<sup>1</sup> Using the most recent demographic data provided by the Indiana Department of Education in regards to the neighborhood in which Allegiant Prep intends to locate (Table A), the above numbers represent a rough estimate of the anticipated racial demographics of our students.

<sup>2</sup> The above numbers were determined using the anticipated percentages of teachers working in public education in Indianapolis. [https://nces.ed.gov/surveys/sass/tables/state\\_2004\\_18.asp](https://nces.ed.gov/surveys/sass/tables/state_2004_18.asp)



Allegiant Preparatory, Inc. EIN: 81-3719222

<b>Riverside</b>	258	3 – 6	F	73%	0/0/0	61% Black 30% Hispanic	67%	17% / 0%
<b>Wendell Phillips</b>	450	PK – 6	F	55%	24/0/21	57% Black 33% Hispanic	71%	14% / 0%
<b>Clarence Farrington</b>	694	PK – 6	F	72%	18/12/19	49% Black 44% Hispanic	72%	12% / 0%
<b>Center for Inquiry III</b>	443	PK – 6	F	NA	29/44/36	41% Black 15% Hispanic	39%	28% / 0%
<b>Louis B. Russell Jr.</b>	383	PK-6	F	NA	0/0/0	93% Black 2% Hispanic	74%	24% / 0%

**Page 15, Section II, Question 7a**

Allegiant Preparatory, Inc. Board Members

Mr. Frederick (Rick) Anderson, Ex-Officio
Ms. Janice Howard
Ms. Alyssa Howard
Mr. Tony Pearson
Mrs. Brianna Saunders
Mr. Charlie Schlegel
Mr. Clifton Snorten
Ms. Keeanna Warren

State of Indiana  
Office of the Secretary of State

Certificate of Incorporation  
of  
**ALLEGIANT PREPARATORY, INC**

I, CONNIE LAWSON, Secretary of State, hereby certify that Articles of Incorporation of the above Domestic Nonprofit Corporation have 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, August 29, 2016.



In Witness Whereof, I have caused to be affixed my signature and the seal of the State of Indiana, at the City of Indianapolis, August 30, 2016

*Connie Lawson*

CONNIE LAWSON  
SECRETARY OF STATE

201608291156172 / 7386899

To ensure the certificate's validity, go to <https://bsd.sos.in.gov/PublicBusinessSearch>

**APPROVED AND FILED**  
CONNIE LAWSON  
INDIANA SECRETARY OF STATE  
08/30/2016 08:25 AM

**ARTICLES OF INCORPORATION**

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

**ARTICLE I - NAME AND PRINCIPAL OFFICE ADDRESS**

**BUSINESS ID** 201608291156172  
**BUSINESS TYPE** Domestic Nonprofit Corporation  
**BUSINESS NAME** Allegiant Preparatory, Inc  
**PRINCIPAL OFFICE ADDRESS** 8928 Ashford Castle Drive #1425, Indianapolis, IN, 46250, USA

**ARTICLE II - REGISTERED OFFICE AND ADDRESS**

**NAME** Frederick Anderson  
**ADDRESS** 8928 Ashford Castle Drive #1425, Indianapolis, IN, 46250, USA

**ARTICLE III - PERIOD OF DURATION AND EFFECTIVE DATE**

**PERIOD OF DURATION** Perpetual  
**EFFECTIVE DATE** 08/29/2016

**ARTICLE IV - PRINCIPAL(S)**

**TITLE** Founder  
**NAME** Frederick Anderson  
**ADDRESS** 8928 Ashford Castle Drive #1425, Indianapolis, IN, 46250, USA

**ARTICLE V - INCORPORATOR(S)**

**NAME** Frederick Anderson  
**ADDRESS** 8928 Ashford Castle Drive #1425, Indianapolis, IN, 46250, USA

**ARTICLE VI - GENERAL INFORMATION**

**STATEMENT OF PURPOSE**

Allegiant Preparatory Academy educates every student in grades K-8 with rigorous academics, character development, and the commitment to community necessary for college success and to lead a life of positive action.

**TYPE OF CORPORATION**

Public benefit corporation, which is organized for a public or charitable purpose

**WILL THE CORPORATION HAVE MEMBERS?**

Yes

**DISTRBUTION OF ASSETS**

IC 20-24-3-3Organizer's dissolution; disposition of remaining assets and funds Sec. 3. The organizer's constitution, charter, articles, or bylaws must contain a clause providing that upon dissolution:(1) the remaining assets of the charter school shall be distributed first to satisfy outstanding payroll obligations for employees of the charter school, then to creditors of the charter school, then to any outstanding debt to the common school fund; and(2) remaining funds received from the department 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. As added by P.L.1-2005, SEC.8. Amended by P.L.280-2013, SEC.23.IC 20-24-3-4Proposal to establish charter school; required contents Sec. 4. (a) An organizer may submit to the authorizer a proposal to establish a charter school.(b) A proposal must contain at least the following information:(1) Identification of the organizer.(2) A description of the organizer's organizational structure and governance plan.(3) The following information for the proposed charter school:(A) Name.(B) Purposes.(C) Governance structure.(D) Management structure.(E) Educational mission goals.(F) Curriculum and instructional methods.(G) Methods of pupil assessment.(H) Admission policy and criteria, subject to IC 20-24-5.(I) School calendar.(J) Age or grade range of students to be enrolled.(K) A description of staff responsibilities.(L) A description of the physical plant.(M) Budget and financial plans.(N) Personnel plan, including methods for selection, retention, and compensation of employees.(O) Transportation plan.(P) Discipline program.(Q) Plan for compliance with any applicable desegregation order.(R) The date when the charter school is expected to:(i) begin school operations; and(ii) have students attending the charter school. Indiana Code 2015

**SIGNATURE**

THE SIGNATOR(S) REPRESENTS THAT THE REGISTERED AGENT NAMED IN THE APPLICATION HAS CONSENTED TO THE APPOINTMENT OF REGISTERED AGENT.

THE UNDERSIGNED, DESIRING TO FORM A CORPORATION PURSUANT TO THE PROVISIONS OF THE INDIANA NONPROFIT CORPORATION ACT, EXECUTE THESE ARTICLES OF INCORPORATION.

IN WITNESS WHEREOF, THE UNDERSIGNED HEREBY VERIFIES, SUBJECT TO THE PENALTIES OF PERJURY, THAT THE STATEMENTS CONTAINED HEREIN ARE TRUE, THIS DAY **August 29, 2016**

**SIGNATURE**

Frederick Anderson

**TITLE**

Incorporator

Business ID : 201608291156172

Filing No. : 7386899

**Allegiant Preparatory Academy Charter School**  
**BOARD OF DIRECTORS**  
**BYLAWS**

1. General

1.1. Name. The name of the corporation is Allegiant Preparatory Inc. (the "Corporation").

1.2. Initial Registered Office and Initial Registered Agent. The post office address of the Corporation's initial registered office is 8928 Ashford Castle Drive. #14250 Indianapolis, IN 46250. The initial registered agent is Rick Anderson. Allegiant Preparatory Academy Charter School ("Allegiant Prep") may also have offices at such other places as the Board of Directors (Board) shall determine the business of Allegiant Prep requires; provided, however, that the registered office be registered with the Secretary of State of Indiana and the agent so registered be located at the same address, or otherwise provided by the Board of Directors.

1.3. The purposes for which Allegiant Prep is organized is to educate every student in grades K-8 with rigorous academics, character development, and a commitment to community necessary for college success and a life of positive action.

1.4. Fiscal Year. The fiscal year of the Corporation shall begin on the first day of July and end on the last day of June in the succeeding year.

1.5. Tax Status. Notwithstanding any other provision of these Bylaws, the corporation shall not carry on any other activities not permitted to be carried on (1) by a corporation exempt from federal income tax under section 501(c)(3) of the Internal Revenue Code, or (2) by a corporation, contributions to which are deductible under 170(c)(2) of the Internal Revenue Code, or the corresponding section of any future federal tax code.

1.6. Dissolution. In the event of dissolution: (1) the remaining assets of the charter school shall be distributed first to satisfy outstanding payroll obligations for employees of the charter school, then to creditors of the charter school, then to any outstanding debt to the common school fund; and (2) remaining funds received from the department 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.

## 2. Board of Directors

### 2.1. Directors.

- 2.1.1. The affairs of the Corporation shall be managed, controlled, and conducted by, and under the supervision of, the Board of Directors, subject to the provisions of the Articles of Incorporation (the "Articles") and these Bylaws. The Board of Directors shall consist of at least seven (7) and not more than fifteen (15) members. All members of the Board of Directors shall be residents of the State of Indiana, and at least sixty percent (60%) of the members of the Board of Directors shall be residents of the Indiana counties where current students at the charter school reside.
- 2.1.2. At a regular meeting of the Board of Directors immediately preceding the expiration of the term of any director, or at a special meeting, the Board of Directors shall elect a new director whose term will expire, or has expired, and each such new director shall serve for a term of three (3) years, or such other period as prescribed by the directors at the time of such election, and until his or her successor is elected and qualified. A director may serve no more than two (2) consecutive terms. Directors shall serve staggered terms to balance continuity with new perspective.
- 2.1.3. Following the expiration of a director's final term, at least one (1) year must elapse before he or she may again be elected to the Board of Directors.
- 2.1.4. The initial Board of Directors will serve staggered terms. The initial Board shall consist of at least two directors who will serve a one-year term (ending in Spring 2018), at least two directors who will serve a two-year term (ending in spring 2019), and at least two directors who will serve a three-year term (ending in Spring 2020).

## 3. Meetings

- 3.1. Regular Meetings. The Board of Directors shall hold regular meetings, as fixed by these Bylaws or by resolution of the Board of Directors.
- 3.2. Annual Meeting. The annual meeting of the Board of Directors shall occur in the last quarter of the fiscal year. There shall be at least ten (10) other regular meetings of the Board held each year. Notice shall be given to each Director thirty (30) days prior to the date of every regular meeting of the Board.
- 3.3. Special Meetings. Notwithstanding the preceding Section 3.1, the Board of Directors may hold special meetings for any lawful purpose upon not less than forty-eight (48) hours notice (excluding Saturdays, Sundays, and legal holidays), as described in Section 3.7. Special meetings may be called by the Chair of the Board or by two (2) or more members of the Board

of Directors. A special meeting shall be held within the State of Indiana and the notice of the meeting shall specify the date, time, and place.

- 3.4. Quorum and Approval of Actions. A majority of the directors in office immediately before a meeting begins shall constitute a quorum for the transaction of any business properly to come before the Board of Directors. Unless otherwise provided in the Articles or these Bylaws, the approval of a quorum shall be deemed an act of the Board of Directors.
- 3.5. Emergency Meetings. In the event of an emergency, including but not limited to (1) an act of god; or (2) serious danger or threat to students and/or staff, a special meetings may be called with little or no notice. Any actions taken by the Board will be treated as if taken at a regularly noticed meeting. A quorum must be present to initiate a vote.
- 3.6. Compliance with Indiana Open Door Law. Notwithstanding any other provisions of these Bylaws, the Corporation shall comply in all respects with the Indiana Open Door Law (currently codified at Indiana Code ("IC") section 5-14-1.5, et seq.), and any corresponding provision of subsequent Indiana law, in connection with all regular or special meetings of the Board of Directors.
- 3.7. Notice of Special Meetings. Written notice of the date, time, and place of each special meeting of the Board of Directors shall be communicated, delivered, or mailed by the Secretary of the Board, or by the person or persons calling the meeting, to each member of the Board of Directors so that such notice is effective at least forty-eight (48) hours before the date of the meeting and complies with the Indiana Open Door Law. The notice need not describe the purpose of the special meeting. Written, electronic, or telefaxed notice, where applicable, shall be effective at the earliest of the following:
  - 3.7.1. When received;
  - 3.7.2. Five (5) days after notice is mailed, as evidenced by the postmark or private carrier receipt, if mailed correctly addressed to the address listed in the most current of records of the Corporation; or
  - 3.7.3. On the date shown on the return receipt, if sent by registered or certified United States mail, return receipt requested, and the receipt is signed by, or on behalf of, the addressee.
- 3.8. Waiver of Notice. Notice of a meeting may be waived in writing if signed by the director entitled to notice and filed with the minutes or the corporate records. Attendance at or participation in any meeting of the Board of Directors shall constitute a waiver of lack of notice or defective notice of such meeting unless the director, at the beginning of the meeting or promptly upon the director's arrival, objects to holding the meeting and does not vote for or assent to any action taken at the meeting.



3.9. Action by Written Consent. Any action required or permitted to be taken at any meeting of the Board of Directors, or any committee thereof, may be taken without a meeting if written consent describing such action is signed by each director or committee member and if such written consent is included in the minutes or filed with the Corporation's records reflecting the action taken. Action taken by written consent shall be effective when the last director or committee member signs the consent and the Board of Directors ratifies the action taken in a subsequent meeting held pursuant to the Indiana Open Door Law, unless the consent specifies a prior or subsequent effective date. A consent signed as described herein shall have the same effect as if approved at a meeting and may be described as such in any document.

3.10. Resignation, Removal, and Vacancies.

3.10.1. Any director may resign at any given time by giving written notice of such resignation to the Board of Directors, the Chair, or the Secretary. Such resignation shall take effect at the time specified therein, or if no time is specified, at the time of its receipt. The acceptance of a resignation shall not be necessary to make it effective.

3.10.2. Any director may be removed for a cause by a majority of the directors then in office. Cause shall include, but shall not be limited to:

3.10.2.1. Violations of applicable law, including (but not limited to):

3.10.2.1.1. Violations of the Indiana Charter School Law;

3.10.2.1.2. Violations of Indiana or federal laws; or

3.10.2.1.3. Any actions that would jeopardize the tax-exempt status of the Corporation or would subject it to sanctions under the Internal Revenue Service Code of 1986, as amended, or corresponding provisions of any subsequent federal tax laws (the "Code").

3.10.2.2. Breach of fiduciary duty, including (but not limited to) a violation of the applicable standard of care under the Articles, these Bylaws, or applicable law.

3.10.2.3. Breach of any governing document relating to the Corporation, including (but not limited to) the Articles, these Bylaws, and the Charter Agreement.

3.10.2.4. Inadequate attendance at meetings of the Board of Directors, defined as absence from three (3) consecutive meetings or from at least fifty (50%) of such meetings within one (1) calendar year.

3.10.3. Any vacancy occurring in the Board of Directors and any position to be filled by reason of an increase in the number of directors may be filled, upon recommendation of a qualified candidate by the Governance Committee, by two-thirds (2/3) vote of the seated Directors. A director elected to fill the vacancy shall be elected for the unexpired term of his/her predecessor in office.

3.11. Members of the Board of Directors.

- (A) Shall receive no payment of honoraria, excepting reimbursement for expenses incurred in performance of voluntary Allegiant Prep activities in accordance with Allegiant Prep Charter School Policies.
- (B) Shall serve as the Allegiant Prep Charter School with the highest degree of undivided duty, loyalty, and care and shall undertake no enterprise to profit personally from their position with the Allegiant Prep Charter School.
- (C) All participants in Board work are bound by the Code of Conduct and Conflict of Interest statements.
- (D) Shall have no direct or indirect financial interest in the assets or leases of the Allegiant Prep Charter School; any Director who individually or as part of a business or professional firm is involved in the business transactions or current professional services of the Allegiant Prep Charter School shall disclose this relationship and shall not participate in any vote taken with respect to such transactions or services.

4. Officers

4.1. In General.

- 4.1.1. There shall be four (4) elective Officers of the Board: a Chair, a Vice Chair, a Secretary, and a Treasurer.
- 4.1.2. The Governance Committee shall present a slate of officers to the Board of Directors. The nominated Officers shall be drawn from among the members of the Board of Directors. The election of Officers shall be held at the annual meeting of the Board.
- 4.1.3. The newly elected Officers shall take office on July 1 following the close of the meeting at which they are elected and the term of office shall be one year, or until respective successors assume office. A director may serve more than one (1) term in the same office, but not more than three consecutive terms in the same office.

4.2. Chair. The Chair shall preside at all meetings of the Board of Directors and shall be responsible for implementing policies established by the Board of Directors. The Chair shall perform such other duties as the Board of Directors may prescribe.

- 4.3. Vice Chair. The Vice Chair shall assist the Chair and shall preside in place of the Chair at meetings when the Chair is absent. The Vice Chair shall assume the duties of the chair when the Chair's office is vacant. The Vice Chair shall perform other duties as the Board of Directors or the Chair may prescribe.
- 4.4. Secretary. The Secretary shall be the custodian of all papers, books, and records of the Corporation other than books of account and financial records. The Secretary shall prepare and maintain a record of the minutes of all meetings of the Board of Directors. The Secretary shall send meeting notices and any other correspondence on behalf of the Corporation, where applicable. The Secretary shall authenticate records of the Corporation as necessary. The Secretary shall perform the duties usual to such position and such other duties as the Board of Directors or the Chair may prescribe.
- 4.5. Treasurer. The Treasurer shall prepare and maintain correct and complete records of account of the Corporation. All notes, securities, and other assets coming into the possession of the Corporation shall be received, accounted for, and placed in safekeeping as the Treasurer may from time to time prescribe. The Treasurer shall maintain any checks distributed to the Corporation and shall be responsible for drafting checks, where applicable, and until such time that the Corporation appoints another individual to oversee these duties. The Treasurer shall collect any revenue for the Corporation, where applicable, and deposit such revenue in the Corporation's designated financial account(s), until such time that the Corporation appoints another individual to oversee these duties. The Treasurer shall finish, whenever requested by the Board of Directors or the Chair, a statement of the financial condition of the Corporation and shall perform the duties usual to such position and such other duties as the Board of Directors or the Chair may prescribe.
- 4.6. Other Officers. In the event that the office of the Chair becomes vacant, the vice-Chair shall become Chair for the unexpired portion of the term. In the event that the office of the Vice-Chair or Secretary-Treasurer becomes vacant, the Chair will appoint interim Officers to fill such vacant offices until a scheduled meeting of the Board can be held.

## 5. Committees

### 5.1. In General.

- 5.1.1. A Board resolution shall appoint committees or task forces of the Board, except the Governance Committee. Committees may be composed of Directors or community members, or both. The Board may prescribe the need and/or the composition of such committees.
- 5.1.2. There shall be a standing nominating committee, known as the Governance Committee. This committee shall be composed of at least three (3) persons recommended by the Chair and elected by the Board of Directors at its annual

meeting. Each committee member shall serve a term of two (2) years, and these terms shall be staggered to ensure continuity of committee membership. The committee shall elect its own chair.

5.1.3. The duties of the Governance Committee shall be:

- (A) to study the qualifications of candidates and present a slate of the best qualified as nominees for the vacant Director positions to the Board;
- (B) to present a slate of nominees for Officers to the Board for election at the annual meeting;
- (C) to recommend candidates to the Board to fill vacancies that arise outside the regular nominating process;
- (D) to provide ongoing orientation to Directors;
- (E) to oversee a Director assessment process to ensure optimum performance; and
- (F) to recommend the appointment of a past Chair to the Board, if necessary, in the interests of the community.

## 6. Indemnification

6.1. Indemnification by the Corporation. Allegiant Preparatory Academy may, to the fullest extent now or hereinafter permitted by law, indemnify against judgments, fines, amounts paid in settlement and reasonable expenses, including attorney's fees, any person made, or threatened to be made, a party to any action or proceeding by reason of the fact that he or she, his or her testator or interstate was a Director, Officer, employee or agent of Allegiant Preparatory Academy. There shall be no indemnification in relation to matters as to which the Board finds that the employee, Officer, Trustee, or agent acted in bad faith or engaged in willful misconduct in the performance of a duty to Allegiant Preparatory Academy.

## 7. Contracts, Checks, Loans, Deposits, and Gifts

7.1. Contracts. The Board of Directors may authorize one or more officers, agents, or employees of the Corporation to enter into any contract or execute any instrument on its behalf. Such authorization may be general or confined to specific instances. Unless so authorized by the Board of Directors, no officer, agent, or employee shall have any power to bind the Corporation or to render it liable for any purpose or amount.

- 7.2. Checks. All checks, drafts, or other orders for payment of money by the Corporation shall be signed by such person or persons as the Board of Directors may from time to time designate by resolution. Such designation may be general or confined to specific instances.
- 7.3. Loans. Unless authorized by the Board of Directors, no loan shall be made by or contracted for on behalf of the Corporation and no evidence of indebtedness shall be issued in its name. Such authorization may be general or confined to specific instances.
- 7.4. Deposits. All funds of the Corporation shall be deposited to its credit in such bank(s) or depositories as the Board of Directors may designate. Such designation may be general or confined to specific instances.
- 7.5. Gifts. The Board of Directors may accept on behalf of the Corporation any gift, grant, bequest, devise, or other contribution for the purposes of the Corporation on such terms and conditions as the Board of Directors shall determine.
8. Rules of Order. In case of conflict or challenge, the rules of order in the current edition of Robert's Rules of Order shall govern the conduct of all meetings of Allegiant Preparatory Academy.
9. Amendments. These Bylaws may be amended at a regular meeting by a two-thirds vote of all Directors then in office; provided that notice of the proposed amendment, together with a copy hereof, is mailed to each Board member at least fifteen (15) days prior to the meeting at which the amendment is to be considered.

**Allegiant Preparatory Academy Charter School**  
**BOARD OF DIRECTORS**  
**CODE OF ETHICS**

In addition to its Bylaws, Allegiant Preparatory Academy Charter School ("Allegiant Prep") will have the following policies related to ethics for the Board of Directors: Conflict of Interest Policy, Confidentiality, and Nepotism.

8.01 Conflict of Interest Policy

For purposes of this conflict of interest policy, the term family members shall be defined as any of the following: husband, wife, son, son-in-law, daughter, daughter-in-law, father, father-in-law, mother, mother-in-law, brother, brother-in-law, sister, sister-in-law, grandparents, and grandchildren.

1. Board members shall serve without compensation, but may be reimbursed, with prior approval, for any necessary expenses incurred by them in performing their duties as members of the Board.
2. Any contract with the school involving a member of the Board, the Board member's family, or the Board member's place of work shall be considered by the full Board with the interested member abstaining. Each Board member is responsible to make known to the Board any circumstances that could involve a potential conflict of interest.
3. Salary and other remuneration received from the school by ex-officio Board members shall not be considered a conflict of interest for the purposes of this policy. However, ex-officio members shall abstain from votes involving the level of such remuneration.
4. A full Conflict of Interest Policy containing Board Member signatures shall be on file at all times.

8.02 Confidentiality Policy

It is the policy of Allegiant Prep that directors and employees may not disclose, divulge, or make accessible confidential information belonging to, or obtained through their affiliation with Allegiant Prep to any person, including relatives, friends and business and professional associates, other than to persons who have a legitimate need for such information and to whom Allegiant Prep has authorized disclosure. Directors and employees shall use confidential information solely for the purpose of performing services as a trustee or employee for Allegiant Prep. This policy is not intended to prevent disclosure where disclosure is required by law.

Directors and employees must exercise good judgment and care at all times to avoid unauthorized or improper disclosures of confidential information. Conversations in public places, such as restaurants, elevators, and airplanes, should be limited to matters that do not pertain to information of a sensitive or confidential nature. In addition, trustees and employees should be sensitive to the risk of inadvertent disclosure and should for example, refrain from leaving confidential information on desks or otherwise in plain view and refrain from the use of speaker phones to discuss confidential information if the conversation could be heard by unauthorized persons.

At the end of a Director's term in office or upon termination of an employee's employment, he or she shall return, at the request of Allegiant Prep, all documents, papers, and other materials, regardless of medium, which may contain or be derived from confidential information, in his or her possession.

### 8.03 Nepotism Policy

For purposes of this nepotism policy, the term family members shall be defined as any of the following: husband, wife, son, son-in-law, daughter, daughter-in-law, father, father-in-law, mother, mother-in-law, brother, brother-in-law, sister, sister-in-law, grandparents, and grandchildren.

1. At no time shall more than one family member of the same family serve concurrently on the Board.
2. Board members and their family members will be excluded from consideration for employment by the organization.
3. Employees shall not hold a position with the organization while they or members of their family serve on the Board or any committee of the Board.
4. Employees may not hold a position in which s/he exercises supervisory authority directly or indirectly over a family member.

**Allegiant Preparatory Academy Charter School**  
**BOARD OF DIRECTORS**  
**CONFLICT OF INTEREST**

**Article I**

**Purpose**

The purpose of the conflict of interest policy is to protect The Allegiant Preparatory Academy Charter School (Allegiant Prep) interest when it is contemplating entering into a transaction or arrangement that might benefit the private interest of an officer or director of Allegiant Prep 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 in any entity with which Allegiant Prep has a transaction or arrangement,
- b. A compensation arrangement with Allegiant Prep or with any entity or individual with which Allegiant Prep has a transaction or arrangement, or
- c. A potential ownership or investment in, or compensation agreement with, any entity or individual with which Allegiant Prep is negotiating a transaction or arrangement.

Compensation includes direct or 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 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 Allegiant Prep can obtain with reasonable efforts an 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 Allegiant Prep'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 boards 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 Allegiant Preparatory Academy Charter School (Allegiant Prep) 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 conflict of interest policy,
- b. Has read and understands the policy,
- c. Has agreed to comply with the policy, and
- d. Understands Allegiant Prep is a charitable organization 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 Allegiant Prep operates in a manner consistent with charitable purpose and does not engage in activities that could jeopardize its tax-exempt status, the Board shall direct that periodic reviews 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 results of arm's length bargaining.
- b. Whether partnerships, joint ventures, and arrangements with management organizations conform to Allegiant Prep'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 excess benefit transaction.

### **Article VIII**

#### **Use of Outside Experts**

When conducting the periodic reviews as provided for in Article VII, Allegiant Prep 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.

**Director and Officer Annual Conflict of Interest Statement Allegiant Preparatory Academy Charter School (Allegiant Prep)**

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

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

3. 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? \_\_\_\_\_

4. I affirm the following:

I have received a copy of the Allegiant Prep Conflict of Interest Policy. \_\_\_\_\_  
(initial)

I have read and understand the policy. \_\_\_\_\_ (initial)

I agree to comply with the policy. \_\_\_\_\_ (initial)

I understand that Allegiant Prep 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)

5. Disclosure:

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

If yes, please describe it: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

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 compensation arrangement, as defined in the Conflict of Interest policy with Allegiant Prep?  
Yes, or No

If yes, please describe it, including when (approximately): \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

If yes, has the financial interest been disclosed, as provided in the Conflict of Interest Policy?  
Yes, or No

Signature of Director: \_\_\_\_\_ Date: \_\_\_\_\_

Date of Review by Governance Committee: \_\_\_\_\_



DEPARTMENT OF THE TREASURY  
INTERNAL REVENUE SERVICE  
CINCINNATI OH 45999-0023

Date of this notice: 08-31-2016

Employer Identification Number:  
81-3719222

Form: SS-4

Number of this notice: CP 575 E

ALLEGIANT PREPARATORY  
8928 ASHFORD CASTLE DR  
INDIANAPOLIS, IN 46250

For assistance you may call us at:  
1-800-829-4933

IF YOU WRITE, ATTACH THE  
STUB AT THE END OF THIS NOTICE.

#### WE ASSIGNED YOU AN EMPLOYER IDENTIFICATION NUMBER

Thank you for applying for an Employer Identification Number (EIN). We assigned you EIN 81-3719222. This EIN will identify you, your business accounts, tax returns, and documents, even if you have no employees. Please keep this notice in your permanent records.

When filing tax documents, payments, and related correspondence, it is very important that you use your EIN and complete name and address exactly as shown above. Any variation may cause a delay in processing, result in incorrect information in your account, or even cause you to be assigned more than one EIN. If the information is not correct as shown above, please make the correction using the attached tear-off stub and return it to us.

When you submitted your application for an EIN, you checked the box indicating you are a non-profit organization. Assigning an EIN does not grant tax-exempt status to non-profit organizations. Publication 557, Tax-Exempt Status for Your Organization, has details on the application process, as well as information on returns you may need to file. To apply for recognition of tax-exempt status under Internal Revenue Code Section 501(c)(3), organizations must complete a Form 1023-series application for recognition. All other entities should file Form 1024 if they want to request recognition under Section 501(a).

Nearly all organizations claiming tax-exempt status must file a Form 990-series annual information return (Form 990, 990-EZ, or 990-PF) or notice (Form 990-N) beginning with the year they legally form, even if they have not yet applied for or received recognition of tax-exempt status.

Unless a filing exception applies to you (search [www.irs.gov](http://www.irs.gov) for Annual Exempt Organization Return: Who Must File), you will lose your tax-exempt status if you fail to file a required return or notice for three consecutive years. We start calculating this three-year period from the tax year we assigned the EIN to you. If that first tax year isn't a full twelve months, you're still responsible for submitting a return for that year. If you didn't legally form in the same tax year in which you obtained your EIN, contact us at the phone number or address listed at the top of this letter.

For the most current information on your filing requirements and other important information, visit [www.irs.gov/charities](http://www.irs.gov/charities).





### **Call to Order**

Welcome by the chair who shares the objectives of the meeting and reviews the agenda.

### **Consent Agenda Items**

Items that are approved by consent (without a vote, if there is no objection) or formal vote. Single items can be taken off calendar and considered separately, if even only one member wishes to do so. Typical items in this calendar are:

- Minutes.
- Routine ratifications.
- Board approval required by the bylaws, such as the approval of banking relations.

### **Treasurer's Report (Item previously sent to the Board)**

This is an opportunity for the treasurer to answer questions on financial reports or bring items for action.

### **Head of School's Report (Item previously sent to the Board)**

Opportunity for Directors to ask questions on the written report and for the Head of School to share any confidential items s/he did not want to put in writing. The Head of school can also use time to update the Board regarding emerging issues.

### **Committee Reports (Items previously sent to the Board)**

Begin with committees that have action items that allow time for questions on other committees' reports. Remember, committees do not need to be on every agenda if they have not sent out a report or have no action items.

### **Issues Discussion (Items previously sent to the Board)**

Opportunity for whole group or small group education or training.

### **Old (Unfinished) Business**

Items that have been postponed from or not finished from previous meetings are handled here.

### **New Business**

This is the opportunity for Director to bring up items that have not been placed on the agenda. In the case of major issues, there likely would not be enough time for a thorough discussion of the item. The Board could agree that such an issue would be scheduled for discussion at future Board meeting or delegated to the appropriate committee for initial discussion with a report back to the Board at a future meeting.

### **Adjournment**



**ALLEGIANT PREP**  
ACADEMY

# Attachment 11

Statement of Assurances



Exhibit E

**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 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 *Elementary and Secondary Education Act of 1965, as amended by the Every Student Succeeds Act of 2015 ("ESSA")*, 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 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, fiscal management, or legal and operational 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.

Name and Title *Rick ANDERSON, Lead Founder*

DATE

Signature



*3/19/17*



**ALLEGIANT PREP**  
ACADEMY

# Attachment 12

Organizational Charts

**Attachment 12: Provides an organizational chart for the proposed school at Year 1 and at Full Capacity.** The chart should identify all administrative, operational, instructional, and non-instructional personnel, as well as any paraprofessionals or specialty teachers. *Note: Limit attachment to five (5) pages.*

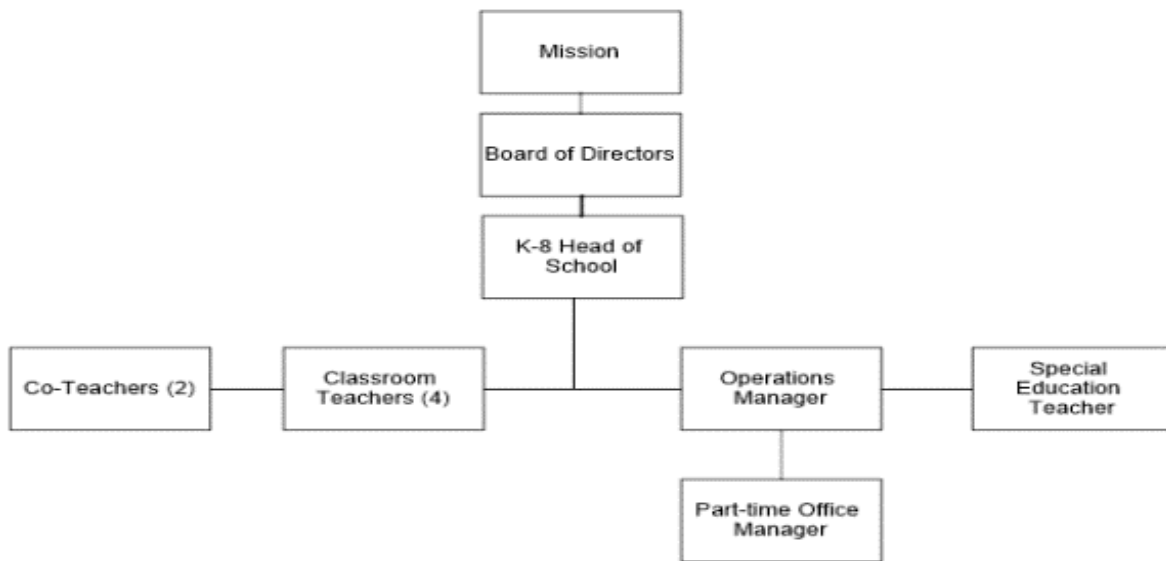
**Organizational Structure**

The Allegiant Prep organizational structure evolves as we grow to scale to ensure instructional and leadership staff have the capacity to meet the needs of our students. In Y1 we will start with 120 students, 60 in Kindergarten and 60 in first grade and add one grade level each year until we reach full capacity (8<sup>th</sup> Grade, 540 students). Our organizational structure allows us to build our leadership pipeline from within. Our organizational model is developed based upon replication of other high-performing urban schools across the country. **Figure 12.1** outlines our staffing plan for years 1-5 (initial authorization, K-5). **Figure 12.2** provides an organizational chart for Y1 and **Figure 12.3** shows an organizational chart for Y8 when Allegiant Prep is at full capacity.

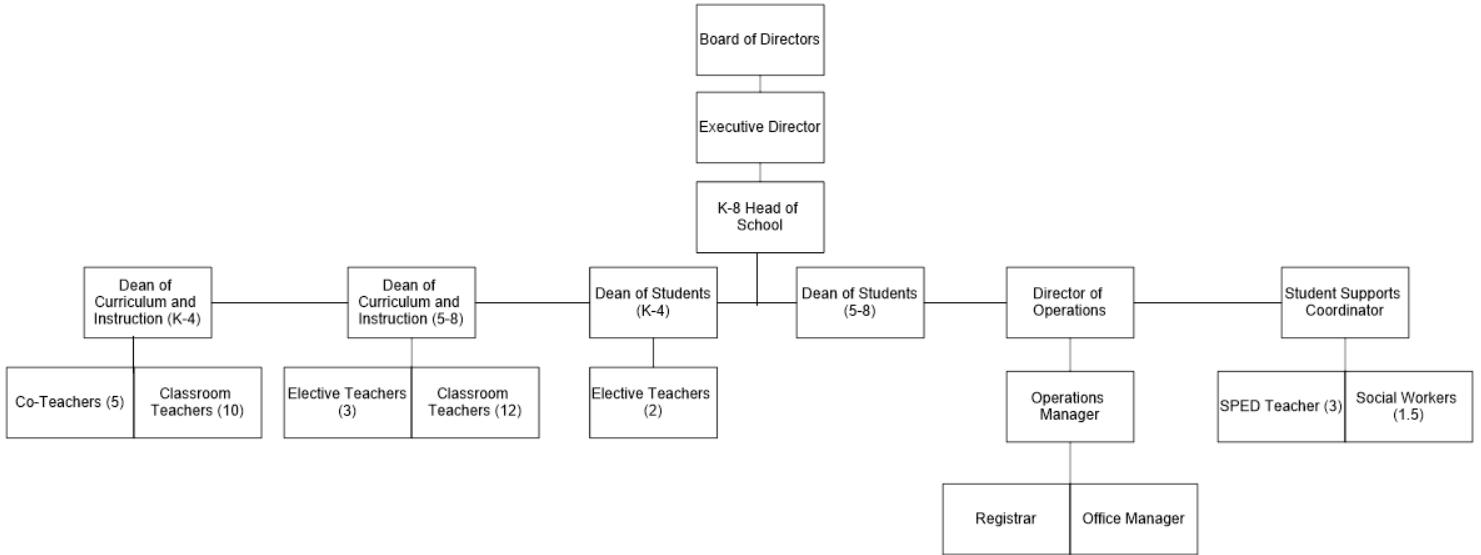
**Figure 12.1: Staffing Plan for Y1-Y5**

	Y1 (K-1)	Y2 (K-2)	Y3 (K-3)	Y4 (K-4)	Y5 (K-5)
<b>Enrollment</b>	<b>120</b>	<b>180</b>	<b>240</b>	<b>300</b>	<b>360</b>
Head of School	1	1	1	1	1
Dean of Curriculum and Instruction (K-4)		1	1	1	1
Dean of Curriculum and Instruction (5-8)					1
Dean of Students					1
Operations Manager	1	1	1	1	1
Office Manager	.75	1	1	2	2
Social Worker			.25	.50	1
Student Supports Coordinator				1	1
Special Education Teacher	1	2	2	2	2
Elective Teacher			1	1	2
Classroom Teacher	4	6	8	10	13
Co- Teacher	2	3	4	5	5
<b>Total</b>	<b>9.75</b>	<b>14</b>	<b>19.25</b>	<b>24.50</b>	<b>31</b>

**Figure 12.2: Staffing plan for Operational Year 1 (2018-2019, K-1, 120 students, 9.75 FTE)**



**Figure 12.3: Staffing plan for Operational Year 8 (2025-2026, K-8, 540 students, 49 FTE)**





**ALLEGIANT PREP**  
ACADEMY

# Attachment 13

Start-Up Plan

**Attachment 13: Provide a detailed start-up plan for the period leading up to the school’s first day of student attendance.**

Note: Limit attachment to ten (10 pages).

**First Day of School.** On July 30, 2018, Allegiant Prep will open with 60 Kindergarten and 60 first grade students.

<b>Key</b>	<b>Roles</b>	<b>Ownership Level</b>
	HOS = Head of School	P = Primary
	OM = Operations Manager	S = Secondary
	IFF = IFF	C = Consultant
	BES = Building Excellent Schools	

\* Darker color notes tasks started prior to 6/2018

Task / Planning / Timeline	HOS	OM	Board	Back Off.	Consultant	IFF	BES	6 / 2017	7 / 2017	8 / 2017	9 / 2017	10 / 2017	11 / 2017	12 / 2017	1 / 2018	2 / 2018	3 / 2018	4 / 2018	5 / 2018	6 / 2018	7 / 2018	8 / 2018
<b>Student Recruitment &amp; Admissions</b>																						
Draft recruitment plan	P						C															
Design marketing materials (flyers/door signs/etc.)	P				C																	
Design and launch website	S				P																	
Post flyers and leaflets in community	P		S																			
Post flyer on website	P				S																	
Identify community orgs to help w/ awareness	P		S																			
Work with community orgs to generate awareness	P		S																			
Broaden recruitment efforts (advertisements, etc.)	P				S																	
Claim all social media accounts on behalf of CCP	P																					
Develop communications calendar	P				C																	
<b>Enrollment Form</b>																						
Design student enrollment form	P						C															
Make enrollment form available	P																					
Post enrollment form on website and link to forms via social media	P																					
<b>Information Sessions and Canvassing</b>																						
Mobilize volunteers for canvassing	P		S																			
Hold monthly canvassing events	P		S																			
Secure locations for information sessions	P																					
Secure translator for specific info sessions	P																					
Host information sessions	P		S																			
<b>Publicity Campaign</b>																						
Write English press release	P				S																	

Task / Planning / Timeline	HOS	OM	Board	Back Off.	Consultant	IFF	BES	6 / 2017	7 / 2017	8 / 2017	9 / 2017	10 / 2017	11 / 2017	12 / 2017	1 / 2018	2 / 2018	3 / 2018	4 / 2018	5 / 2018	6 / 2018	7 / 2018	8 / 2018	
Secure translation of press release	S				P																		
Distribute press releases	P				S																		
<b>Admissions Lottery and Enrollment</b>																							
Distribute and collect intent to enroll forms	P		S																				
Distribute and collect enrollment forms	P		S																				
Secure translator for lottery	P																						
Secure lottery announcer	P																						
Secure lottery location	P																						
Establish lottery protocol	S		P																				
Highlight lottery date on website	P																						
Post lottery date in local papers	P																						
Practice lottery protocol	P																						
Conduct admissions lottery	P		S																				
Notify families of status	P	S																					
Establish wait list and re-lottery process	P	S																					
Post notification of lottery	P	S																					
Confirm acceptances via home visits	P	S																					
Request student records	S	P																					
Receive student records	S	P																					
<b>Facilities</b>																							
Toured six facilities in target community	P					P																	
Ongoing facility tours	P					P																	
Form Facility Committee on Board	S		P																				
Architect selection process	S		P			P																	
Site schematic design and scope of work	P		S			P																	
Preliminary cost estimates	P				S	P																	
General contractor preliminary interviews	P		S			P																	
Select top two sites	S		P			P																	
Letters of Intent of top two options	S		P		P	P																	
General Contractor RFP and selection	S		P		P	P																	
Negotiate lease/purchase terms on top site	P		P			P																	
Begin loan conversations with lenders	P		S			P																	
Construction documents submitted for permitting	S				P																		
Project goes out for bid	P					P																	
Execute lease	P					P																	



Task / Planning / Timeline	HOS	OM	Board	Back Off.	Consultant	IFF	BES	6 / 2017	7 / 2017	8 / 2017	9 / 2017	10 / 2017	11 / 2017	12 / 2017	1 / 2018	2 / 2018	3 / 2018	4 / 2018	5 / 2018	6 / 2018	7 / 2018	8 / 2018
Close loan with project lender (if necessary)	P					P																
Project construction on tenant and site improve.	S				P	S																
FFE selection and procurement	P	S				P																
Obtain Certificate of Occupancy	P	S																				
Obtain property insurance	P					S																
Staff and furniture move-in	P	S																				
<b>Governance</b>																						
Move from Founding to Governing Board	P		P																			
Ratify By-Laws, COI, and Code of Ethics	S		P				C															
Define role of Board members	S		P				C															
Define relationship of Board and HOS	S		P				C															
Define communication methods	S		P				C															
Define decision-making processes	S		P				C															
Draft polices	S		P				C															
Arrange Board liability insurance	S		P																			
Develop Board calendar	S		P																			
Apply for 501c3	P		S																			
<b>Board Structure</b>																						
Create job description for full board and adopt	S		P				C															
Create job description for each of the officers, adopt and elect officers	S		P				C															
Create job description for each committee chair and each committee. Adopt as policy	S		P				C															
Complete Board member background checks and submit to ICSB	S		P																			
Finalize and approve standards of conduct for Board members	S		P				C															
Finalize and approve Board member handbook	S		P				C															
<b>Board Meetings</b>																						
Set day and time for board meetings. Follow postings for Open Meeting Law	S		P																			
Develop agenda format	S		P				C															
Develop consistent format for board meeting packets (released to full board a week in advance)	S		P				C															
Develop checklist that Board members could use to evaluate each board meeting and use tool	S		P				C															
Approve formal meeting minutes	S		P																			

3 | ALLEGIANT PREP: ATTACHMENT 13



Task / Planning / Timeline	HOS	OM	Board	Back Off.	Consultant	IFF	BES	6 / 2017	7 / 2017	8 / 2017	9 / 2017	10 / 2017	11 / 2017	12 / 2017	1 / 2018	2 / 2018	3 / 2018	4 / 2018	5 / 2018	6 / 2018	7 / 2018	8 / 2018	
Create mechanism to track attendance at board and committee meetings	S		P				C																
Develop board calendar and start to list critical tasks that need to happen at each board meeting	S		P				C																
Finalize mechanism for keeping hard copies of official policies	S		P				C																
Finalize comprehensive list of all policies needed prior to first day of school	S		P				C																
<b>School Leader</b>																							
Create a job description of HOS	S		P				C																
Determine performance measures for HOS	S		P				C																
Create a clear process for evaluating HOS	S		P				C																
Set a salary range based on industry standards	S		P				C																
Hire Head of School			P																				
<b>Board Development</b>																							
Create a board development plan to include orientation of new members, retreats, workshops	S		P				C																
Host Governing Board Retreat	P		S				C																
<b>Fund Development/Fundraising</b>																							
Identify, cultivate and solicit potential individual donors	P		P																				
Write Federal PCSP Grant	P																						
Design fundraising strategy																							
Approve board fundraising strategy	S		P																				
Apply for additional start-up grants	P		S																				
First and second round Erate application	P		S																				
Plan and host series of events for securing donations	S		P																				
<b>Administrative</b>																							
<b>Data Management</b>																							
Create filing system	P																						
Develop database for student reporting (e.g., weekly behavior reports)	P																						
Develop student attendance reporting system	P																						
<b>Procurement</b>																							
Purchase supplies and materials for program	P						C																
Secure janitorial services	P																						

4 | ALLEGIANT PREP: ATTACHMENT 13



Task / Planning / Timeline	HOS	OM	Board	Back Off.	Consultants	IFF	BES	6 / 2017	7 / 2017	8 / 2017	9 / 2017	10 / 2017	11 / 2017	12 / 2017	1 / 2018	2 / 2018	3 / 2018	4 / 2018	5 / 2018	6 / 2018	7 / 2018	8 / 2018
<b>Family Outreach</b>																						
Write family letter re: Parent Orientation	P																					
Mail family letter re: Parent Orientation	P	S																				
Call/visit all families re: Parent Orientation	P																					
Prepare pre-opening Parent Orientation protocol and materials	P	S					C															
Hold pre-opening Parent Orientation	P	S																				
<b>Curriculum, Teaching and Learning</b>																						
<b>Curriculum Development</b>																						
Determine instructional vision for the school	P																					
Site visits and analysis of "best practice" charter and public school models	P						C															
Attend national and local educational conferences	P																					
Create plan to ensure instructional program aligns with mission/values	P																					
Identify preliminary models for core subjects	P				C																	
Finalize all instructional staff job descriptions	P																					
Create and finalize curriculum plans and timelines	P																					
Create benchmarks aligned with state standards and curriculum frameworks	P				C																	
Create scope and sequence for each subject	P				C																	
Create and finalized Unit 1 plans for all core content	P																					
<b>Procurement</b>																						
Purchase materials and textbooks	S	P																				
Contract with NWEA MAP, STEP	P																					
Purchase standardized testing materials	S	P																				
<b>Assessment</b>																						
Define assessment strategy and timeline	P																					
Create diagnostic assessment and tools for data analysis	P																					
Conduct diagnostic testing for all students	P																					
Enter data from baseline tests	P																					
Create interim assessments – math and reading	P				C																	
Create interim assessments – science, social studies, and writing	P				C																	



Task / Planning / Timeline	HOS	OM	Board	Back Off.	Consultant	IFF	BES	6 / 2017	7 / 2017	8 / 2017	9 / 2017	10 / 2017	11 / 2017	12 / 2017	1 / 2018	2 / 2018	3 / 2018	4 / 2018	5 / 2018	6 / 2018	7 / 2018	8 / 2018
<b>Instructional Program</b>																						
Finalize student handbook	P																					
Approve student handbook	S		P																			
Finalize school calendar	P																					
Develop class configuration	P																					
Organize "Tutoring and Choice" time	P																					
<b>Special Education</b>																						
Recruit and hire Coordinator of Student Supports	P																					
Identify and secure specific texts and materials	P																					
Consult with SPED admin at INISchools	P																					
Identify special education student population	P																					
Acquire student records – IEP	P																					
Develop IEPs – if needed (update and review)	P																					
Define service requirements for all SPED students	P																					
<b>School Culture and Climate</b>																						
Determine school wide behavioral expectations	P	S																				
Determine expectations for whole school routines	P	S																				
Finalize daily schedule	P																					
Finalize discipline policy	P																					
Develop special rituals/routines	P																					
Create staff cultural binders defining all routines and systems	P																					
Create student culture orientation	P																					
Develop community meeting curricula	P																					
<b>After School Program</b>																						
Contact after school partners	P	S																				
Apply for after school grants	P	S																				
<b>Financial Management</b>																						
Codify the fiscal controls and financial policies the school will employ to track daily operational finances		P																				
Identify check signers	S	P		C																		
Identify check writers	S	P		C																		
Define signature policies	S	P		C																		
Develop financial reporting templates (budget vs. actual) and policy	S	P		C																		



Task / Planning / Timeline	HOS	OM	Board	Back Off.	Consultant	IFF	BES	6 / 2017	7 / 2017	8 / 2017	9 / 2017	10 / 2017	11 / 2017	12 / 2017	1 / 2018	2 / 2018	3 / 2018	4 / 2018	5 / 2018	6 / 2018	7 / 2018	8 / 2018
Design process forms (purchase orders, expense forms) & policy	S	P		C																		
Appoint Treasurer	S	P																				
Develop segregation of funds policy (public/private)	S	P		C																		
Establish payroll	S	P		C																		
Develop schedule of Board financial reviews	S	P		C																		
Approve fiscal policy manual	S	P		C																		
Bid and hire back office service provider	S		P																			
Develop chart of accounts to track income, expenses, assets, liabilities, cash flows	S		S	P																		
Set up bank accounts	P		S	C																		
Define investment/savings strategy (where will excess funds be placed)	P		S	C																		
Finalize cash flow plan	P		S	C																		
<b>Personnel</b>																						
Develop org chart and job descriptions	P																					
Develop staff handbook	P		S																			
Put together a literature packet on the school with information on: 1. Teaching calendar; 2. Professional development opportunities; 3. School mission	P						C															
Design the interview process (look at models)	P						C															
Finalize compensation and benefits packages	P		S																			
Design a filing/documentation process.	P																					
Identify potential recruitment opportunities	P						C															
Advertise/spread job descriptions through local and online channels	P																					
Recruit and hire School Operations Manager	P						C															
Recruit and hire Special Education Teacher	P						C															
Recruit and hire Office Manager	P						C															
Recruit and hire Teachers	P						C															
Perform background checks on employees	P																					
Define policies and procedures for evaluation of staff	P						C															
Negotiate and sign agreements for contracted services	P		S																			



Task / Planning / Timeline	HOS	OM	Board	Back Off.	Consultant	IFF	BES	6 / 2017	7 / 2017	8 / 2017	9 / 2017	10 / 2017	11 / 2017	12 / 2017	1 / 2018	2 / 2018	3 / 2018	4 / 2018	5 / 2018	6 / 2018	7 / 2018	8 / 2018
Create various "form letters" including: 1. Postcard saying we received application; 2. Decline letter; 3. Memo of understanding (contract) about work agreement; 4.	P						C															
Salary/benefits information sheet Approve staff handbook	P																					
Have new staff fill out Employee Information forms (ie. emergency contact)	S	P																				
Fill out forms to enroll teachers in TRF/ PERF	S	P																				
Plan and hold staff orientation	P	S					C															
<b>Food Service</b>																						
Issue RFP	P																					
Define requirement (# of students – any religious/individual requirements)	S	P																				
Identify FRL – contact DOE/LEA	S	P																				
Determine food service arrangement	P	S																				
Select vendor and draft contract	P																					
Develop food service policies	P	S																				
Sign contract	P																					
Apply for grants for fresh produce program	P	S																				
<b>Health and Safety</b>																						
Complete all state reporting requirements	P																					
Identify doctor/nurse resources	P																					
Identify first aid resources	P																					
Develop a system for record-keeping	S	P																				
Develop policy for non-compliance by parents	P																					
Acquire medical forms - from parents (included in application)	P																					
Check for completeness	S	P																				
Staff first aid training	S	P																				
Create and distribute health and safety handbook	P																					
Purchase first aid resources	P																					
Contact police and fire departments	S	P																				
Undergo fire inspection	P																					
Undergo building inspection	P						C															
Contact Board of Health	P																					
Develop fire drill policy, schedule, route	P																					



Task / Planning / Timeline	HOS	OM	Board	Back Off.	Consultant	IFF	BES	6 / 2017	7 / 2017	8 / 2017	9 / 2017	10 / 2017	11 / 2017	12 / 2017	1 / 2018	2 / 2018	3 / 2018	4 / 2018	5 / 2018	6 / 2018	7 / 2018	8 / 2018
<b>Community Partnerships</b>																						
Identify and meet with community partnership opportunities	P		S																			
Develop partnerships of after school opportunities on Friday's abbreviated schedule	P																					
Develop partnerships for before/after school care options for families	P																					
Devise performance measures for each strategic alliance	P		S																			
<b>Parents and Community</b>																						
<b>Parent/Student Handbook(s)</b>																						
Contract for translation (Spanish)	P																					
Secure a printer	P																					
Submit edited copy to printer	P																					
Distribute final copies to parent	P																					
<b>Communication</b>																						
Design school logo	P				C																	
Create branding guidelines	P				C																	
Create or identify a pro-bono graphic designer to create website	P				C																	
Set up nonprofit mailing status with Post Office	P																					
Develop filing system to store student academic, disciplinary, and health records	P	S																				
Define how information will flow within school	S	P																				
Define procedure for visitors entering building	S	P																				
Develop forms necessary to track and monitor visitors	S	P																				
Define how staff will communicate (email, walkie talkie, phones)	P	S																				
Set up phone systems and answering services	P																					
<b>Purchasing</b>																						
Create a comprehensive list of all items that need to be purchased through Dec. of Y1	P																					
Purchase classroom equipment and furniture	P					C																
Purchase office equipment and furniture	P					C																
Purchase postage meter	P	S																				
Purchase restroom supplies	P	S																				



Task / Planning / Timeline	HOS	OM	Board	Back Off.	Consultant	IFF	BES	6 / 2017	7 / 2017	8 / 2017	9 / 2017	10 / 2017	11 / 2017	12 / 2017	1 / 2018	2 / 2018	3 / 2018	4 / 2018	5 / 2018	6 / 2018	7 / 2018	8 / 2018
Purchase cleaning products	P	S																				
Purchase classroom library materials	P	S																				
Purchase performing arts materials	P	S																				
Purchase PE equipment	P	S																				
Purchase medical supplies	P	S																				
Purchase classroom technology	P	S																				
Purchase office supplies	P	S																				
Purchase PA/communication system	P	S																				
<b>Contract Personnel</b>																						
Hire janitorial services	P																					
Line up electrician, plumber, & handyman	P																					
<b>Technology</b>																						
Select provider for internet access (DSL, cable)	P																					
Set up intranet (so all computers are linked)	P																					
Select cloud based storage program	P																					
Write tech plan	P				C																	
Select staff computers	P				C																	
<b>Uniforms</b>																						
Contract student uniforms	P																					
Notify enrolled families of uniform availability	P	S																				
Set uniform policy	P						C															







**ALLEGIANT PREP**  
ACADEMY

# Attachment 14

Insurance Coverage

March 3, 2017

**RE: Allegiant Prep**  
**Broker of Record – Arthur J. Gallagher & Co.**

To Whom It May Concern:

We are pleased to provide insurance services for Allegiant Prep. Our division specializes in Education and Charter Schools throughout the country. We currently work in many states helping schools secure insurance and are licensed to work in The State of Indiana as required by law.

Our program utilizes the following carriers which are admitted in the State of Indiana: The Hartford, AIG, Philadelphia Insurance Company, Scottsdale Insurance Company, Gerber Life Insurance Company.

We will only place this school with at least an "A-, VII" rated insurance carrier as determined by AM Best rating guidelines.

On behalf of Allegiant Prep the following coverages will be secured to meet all requirements of the authorizing agency and/or additional insureds as appropriate:

Coverage	Limit
<b>General Liability (includes corporal punishment, athletic participation*)</b>	\$1,000,000 occurrence expressly covers field trips \$3,000,000 aggregate limit
<b>Workers Compensation</b>	As specified by Indiana Statutes
<b>Workers' Compensation Part II (Employers' Liability)</b>	\$1,000,000
<b>Employee Benefits Liability</b>	\$1,000,000 per claim dedicated limit \$3,000,000 aggregate limit
<b>Automobile/Bus Liability including non-owned and hired; underinsured as needed</b>	\$1,000,000 combined single limit
<b>Employment Practices Liability</b>	\$1,000,000 per claim/annual aggregate dedicated limit
<b>Educators Legal Liability (School Leaders E&amp;O and/or Professional Liability)</b>	\$2,000,000 per claim/annual aggregate dedicated limit
<b>Directors &amp; Officers</b>	\$1,000,000 per claim/annual aggregate dedicated limit
<b>Sexual Abuse and Misconduct Liability</b>	\$1,000,000 dedicated limit \$3,000,000 aggregate limit
<b>Crime / Employee Dishonesty / Fidelity Coverage (Will obtain a Surety Bond as required)</b>	\$500,000 - \$1,000,000 limits as needed and based on cash flow of the school
<b>Property/Lease and Boiler Machinery Coverage</b>	Blanket Limits as needed by School, on an all risk of direct physical basis (replacement cost to school building for fire and theft)
<b>Business Income/Extra Expense</b>	\$300,000 Extra Expense included Business Income as needed based upon cash flow
<b>Student Accident Coverage*</b>	Primary \$25,000 CAT at \$1,000,000 or \$5,000,000
<b>Cyber Security Liability</b>	\$1,000,000 per loss or claim/aggregate limit
<b>Umbrella / Excess Liability above primary program (GL, Auto, Abuse, D&amp;O, EPLI, ELL, EBL)</b>	Options up to \$25,000,000

\*In order for the general liability to include athletic participation, student accident coverage must be purchased. Catastrophic Student Accident is required for football exposures. In addition parental waivers and confirmation of health insurance from parents is also required.



**Additional Insureds/Loss Payees:**

Our program includes the Charter Authorizer, their respective members, officers, employees, officials and agents as additional insureds on the Directors and Officers policy. In addition our General Liability policy includes blanket Additional Insureds status for Managers or Lessors or Premises; By Contract, Agreement or Permit; and Funding Source. Loss Payees can be added to the property upon our review of the lease/funding contracts.

**Estimated Premiums:**

The estimate below has been prepared based on current market rates, anticipated student population, number of fulltime employees and building dimensions. The insurance estimate is based on the types and amounts of insurance that are required by Indiana Authorizers.

Coverage	Year 1 Premium Indication
General Liability/Abuse/Crime/Auto/Employee Benefits/Educators E&O	\$ 3,700
Directors & Officers / Employment Practices / Fiduciary	\$ 4,100
Property	\$ 950
Excess \$10 million Limits (follow form over underlying)	\$ 1,600
Workers Compensation/Employers Liability	\$ 2,900
Cyber Liability Premium	\$ 1,298
<b>Total Annual Premium</b>	<b>\$ 14,548</b>

Premiums are based upon 1<sup>st</sup> year projections of 120 students, 18 staff members, \$600,000 payroll, \$75,000 Contents, and less than \$2,000,000 in revenue. This includes an estimated building insurance, though we can offer such insurance if Allegiant owns a building or is required to insure the building which it leases.

Please let me know if you have any questions.

Sincerely,

Martin S. Dezelan  
Area Vice President  
Arthur J. Gallagher Risk Management Services, Inc.





**ALLEGIANT PREP**  
ACADEMY

# Attachment 15

Budget and Staffing Workbook

## **INDIANA CHARTER SCHOOL BOARD**

### 5-Year Pro Forma Budget Submission Template

#### **General Instructions for New School Applicants**

- Complete the School Enrollment Projection tab in ORANGE
  - Complete the Year 0 - Budget and Cash Flow tab in PURPLE
  - Complete ALL FIVE annual budget tabs in BLUE
  - Complete ALL FIVE staffing tabs in GREEN
  - Enter information into the WHITE cells
  - Do not enter information into the GREY cells
- NOTE: Applicants proposing to operate a network of schools should add a worksheet or attach a separate file reflecting the consolidated network's 5-Year pro-forma budget, reflecting all components - including the regional back office/central office - of the Indiana network.
- We encourage applicants to contact the Indiana Department of Education Office of School Finance to learn more about Indiana's funding formula and all grant and operating funds available. Visit <http://www.doe.in.gov/idoefinance> for more information.

**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	60	60	0	0	0	0	0	0	0	0	0	0	0	120	16%	18%	85%
Year 2	60	60	60	0	0	0	0	0	0	0	0	0	0	180	16%	18%	85%
Year 3	60	60	60	60	0	0	0	0	0	0	0	0	0	240	16%	18%	85%
Year 4	60	60	60	60	60	0	0	0	0	0	0	0	0	300	16%	18%	85%
Year 5	60	60	60	60	60	60	0	0	0	0	0	0	0	360	16%	18%	85%

Planned Number of Classes														
ACADEMIC YEAR	K	1	2	3	4	5	6	7	8	9	10	11	12	TOTAL
Year 1	2	2	0	0	0	0	0	0	0	0	0	0	0	4
Year 2	2	2	2	0	0	0	0	0	0	0	0	0	0	6
Year 3	2	2	2	2	0	0	0	0	0	0	0	0	0	8
Year 4	2	2	2	2	2	0	0	0	0	0	0	0	0	10
Year 5	2	2	2	2	2	2	0	0	0	0	0	0	0	12

**Note: FDK students are treated as 1 for purposes of ADM. 1/2 day kindergarten students are 0.5 ADM**

		<b>2016</b>	<b>2017</b>
Foundation Grant	\$	4,967	\$ 5,088
Complexity Grant	\$	3,489	\$ 3,539

Allegiant Preparatory Academy Charter School												
	Year 0	Year 1	Year 2	Year 3	Year 4	Year 5						
<b>REVENUE</b>												
<b>State Revenue</b>												
Basic Grant	\$	610,560	\$	915,840	\$	1,221,120	\$	1,526,400	\$	1,831,680		
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	\$	60,000	\$	90,000	\$	-	\$	-	\$	-		
Charter and Innovation Network School Advance Program	\$	-	\$	-	\$	-	\$	-	\$	-		
Complexity Grant	\$	276,042	\$	414,063	\$	552,084	\$	690,103	\$	828,126		
Special Education Funding for students with severe disability and mild/moderate	\$	61,200	\$	101,900	\$	131,400	\$	163,200	\$	195,000		
<b>Federal Revenue</b>												
Public Charter School Program (PCSP) Grant	\$	-	\$	-	\$	-	\$	-	\$	-		
Public Law 101-476 (IDEA)	\$	10,907	\$	17,140	\$	22,334	\$	28,048	\$	33,761		
Title I	\$	41,004	\$	61,506	\$	82,008	\$	102,510	\$	123,012		
Title II	\$	4,000	\$	6,120	\$	8,160	\$	10,200	\$	12,240		
Federal Lunch Program	\$	58,558	\$	87,836	\$	117,115	\$	146,394	\$	175,673		
Federal Breakfast Reimbursement	\$	37,746	\$	56,619	\$	75,492	\$	94,365	\$	113,238		
Federal Snack Reimbursement	\$	15,088	\$	22,631	\$	30,175	\$	37,719	\$	45,263		
E-Rate	\$	2,880	\$	2,930	\$	2,982	\$	3,034	\$	3,087		
<b>Other Revenues</b>												
Committed Philanthropic Donations	\$	355,000	\$	30,000	\$	30,000	\$	30,000	\$	30,000		
Before and After Care Fees	\$	-	\$	-	\$	-	\$	-	\$	-		
Interest Income	\$	-	\$	-	\$	-	\$	-	\$	-		
Other (please describe)	\$	-	\$	-	\$	-	\$	-	\$	-		
Other (please describe)	\$	-	\$	-	\$	-	\$	-	\$	-		
Other (please describe)	\$	-	\$	-	\$	-	\$	-	\$	-		
Other (please describe)	\$	-	\$	-	\$	-	\$	-	\$	-		
Other (please describe)	\$	-	\$	-	\$	-	\$	-	\$	-		
<b>Total Revenue</b>	\$	<b>355,000</b>	\$	<b>1,208,165</b>	\$	<b>1,806,586</b>	\$	<b>2,272,870</b>	\$	<b>2,831,974</b>	\$	<b>3,391,080</b>
<b>EXPENDITURES</b>												
<b>Personnel Expenses</b>												
Wages, Benefits and Payroll Taxes	\$	115,090	\$	541,947	\$	847,550	\$	1,140,410	\$	1,506,245	\$	1,869,389
Substitute Teachers	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-
Professional Development	\$	2,500	\$	2,438	\$	3,816	\$	5,241	\$	6,979	\$	8,575
Bonuses	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-
Other (please describe)	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-
Other (please describe)	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-
Other (please describe)	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-
Other (please describe)	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-
Other (please describe)	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-
Other (please describe)	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-
<b>Total Personnel Expenses</b>	\$	<b>117,590</b>	\$	<b>544,384</b>	\$	<b>851,366</b>	\$	<b>1,145,651</b>	\$	<b>1,513,224</b>	\$	<b>1,877,964</b>
<b>Instructional Supplies and Resources</b>												
Textbooks	\$	-	\$	12,000	\$	18,315	\$	24,847	\$	31,603	\$	38,587
Library, periodicals, etc	\$	-	\$	2,400	\$	3,663	\$	4,969	\$	6,321	\$	7,717
Technology	\$	-	\$	8,100	\$	6,410	\$	7,558	\$	8,849	\$	10,183
Assessment materials	\$	-	\$	18,800	\$	7,326	\$	9,959	\$	12,641	\$	15,435
Computers	\$	-	\$	15,000	\$	7,631	\$	7,765	\$	7,901	\$	8,039
Software	\$	-	\$	6,000	\$	9,158	\$	12,454	\$	15,801	\$	19,293
Other classroom supplies	\$	-	\$	12,000	\$	18,315	\$	24,847	\$	31,603	\$	38,587
Field trips, other unclassified items	\$	-	\$	1,800	\$	2,747	\$	3,727	\$	4,740	\$	5,788
Out-curricular & Athletics	\$	-	\$	600	\$	916	\$	1,242	\$	1,580	\$	1,929
ELL Materials	\$	-	\$	960	\$	1,465	\$	1,988	\$	2,528	\$	3,087
SPED Materials	\$	-	\$	1,050	\$	1,119	\$	1,113	\$	1,138	\$	1,161
Curriculum	\$	-	\$	24,000	\$	36,630	\$	49,695	\$	63,205	\$	77,174
Uniforms	\$	-	\$	2,400	\$	3,663	\$	4,969	\$	6,321	\$	7,717
Other (please describe)	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-
<b>Total Instructional Supplies and Resources</b>	\$	-	\$	<b>105,110</b>	\$	<b>117,358</b>	\$	<b>155,084</b>	\$	<b>194,230</b>	\$	<b>234,698</b>
<b>Support Supplies and Resources</b>												
Administrative Computers	\$	1,700	\$	5,525	\$	4,541	\$	4,620	\$	5,596	\$	5,011
Administrative Software	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-
Administration Dues, fees, misc expense	\$	-	\$	1,500	\$	2,000	\$	2,000	\$	2,000	\$	2,000
Office supplies	\$	1,200	\$	4,800	\$	4,884	\$	4,969	\$	5,056	\$	5,145
Copier Supplies	\$	-	\$	2,400	\$	3,663	\$	4,969	\$	6,321	\$	7,717
Medical Supplies	\$	-	\$	150	\$	229	\$	311	\$	395	\$	482
Custodial Supplies	\$	-	\$	2,400	\$	3,663	\$	4,969	\$	6,321	\$	7,717
Background Fees	\$	90	\$	405	\$	225	\$	225	\$	270	\$	270
Copier Leases	\$	-	\$	4,620	\$	9,402	\$	14,349	\$	14,600	\$	14,856
<b>Total Support Supplies and Resources</b>	\$	<b>2,990</b>	\$	<b>21,800</b>	\$	<b>28,606</b>	\$	<b>36,413</b>	\$	<b>40,559</b>	\$	<b>43,199</b>
<b>Board Expenses</b>												
Charter Board Services, including Board Training, retreat	\$	1,000	\$	1,000	\$	1,000	\$	1,000	\$	1,000	\$	1,000
Charter Board Supplies & Equipment	\$	1,200	\$	1,200	\$	1,200	\$	1,200	\$	1,200	\$	1,200
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>2,200</b>	\$	<b>2,200</b>	\$	<b>2,200</b>	\$	<b>2,200</b>	\$	<b>2,200</b>	\$	<b>2,200</b>
<b>Professional Purchased or Contracted Services</b>												
Legal Services	\$	5,000	\$	5,000	\$	5,000	\$	10,000	\$	10,000	\$	15,000
Adult Services (compliant with SBOA requirements)	\$	-	\$	10,000	\$	10,000	\$	10,000	\$	10,000	\$	10,000
Payroll Services	\$	504	\$	1,732	\$	1,866	\$	1,999	\$	2,158	\$	2,298
Accounting Services	\$	5,000	\$	60,000	\$	60,000	\$	65,000	\$	65,000	\$	65,000
Printing/Newsletter/Annual Report Service	\$	1,500	\$	1,500	\$	1,526	\$	1,580	\$	1,665	\$	1,784
Consultants	\$	13,200	\$	10,000	\$	10,000	\$	-	\$	-	\$	-
Internet Services	\$	-	\$	2,400	\$	2,442	\$	2,485	\$	2,528	\$	2,572
Telephone/Telecommunication Service	\$	-	\$	1,200	\$	1,221	\$	1,242	\$	1,264	\$	1,286
Total Insurance Costs (per ICSB requirements detailed in charter school application)	\$	2,500	\$	16,500	\$	19,841	\$	22,259	\$	24,755	\$	27,332
Travel	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-
Postage	\$	4,500	\$	3,000	\$	4,500	\$	6,000	\$	7,500	\$	9,000
Special Education Services	\$	-	\$	10,500	\$	16,789	\$	22,259	\$	28,442	\$	34,835
Student Information Services	\$	-	\$	13,000	\$	4,500	\$	6,000	\$	7,500	\$	9,000
Food service	\$	-	\$	116,460	\$	177,747	\$	241,144	\$	306,704	\$	374,486
Transportation	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-
Nursing Services	\$	-	\$	3,000	\$	4,579	\$	6,212	\$	7,901	\$	9,647
Other (Please Describe)	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-
Staff Recruitment, Student Recruitment, & Marketing	\$	14,100	\$	13,100	\$	16,213	\$	20,575	\$	23,000	\$	19,300
Teach for America Fees	\$	-	\$	10,000	\$	10,000	\$	10,000	\$	10,000	\$	10,000
Technology Services	\$	-	\$	12,300	\$	13,526	\$	16,553	\$	19,580	\$	21,608
<b>Total Professional Purchased or Contracted Services</b>	\$	<b>46,304</b>	\$	<b>289,692</b>	\$	<b>359,750</b>	\$	<b>443,308</b>	\$	<b>527,998</b>	\$	<b>613,150</b>
<b>Facilities</b>												
Rent, mortgage, or other facility cos	\$	-	\$	108,000	\$	164,835	\$	223,626	\$	284,425	\$	347,282
Furniture & Equipment	\$	-	\$	16,400	\$	7,024	\$	7,098	\$	7,174	\$	8,502
Gas/electric	\$	-	\$	18,000	\$	27,473	\$	37,271	\$	47,404	\$	57,880
Water/ Sewer	\$	-	\$	3,000	\$	4,579	\$	6,212	\$	7,901	\$	9,647
Grounds Keeping	\$	-	\$	3,000	\$	4,579	\$	6,212	\$	7,901	\$	9,647
Maintenance Services	\$	-	\$	6,000	\$	9,000	\$	12,000	\$	15,000	\$	18,000
Custodial	\$	-	\$	21,000	\$	32,851	\$	43,483	\$	55,305	\$	67,527
Waste disposal	\$	-	\$	3,000	\$	4,579	\$	6,212	\$	7,901	\$	9,647
Debt Service for Facilities (Interest Only)	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-
IFF Fee	\$	4,400	\$	-	\$	-	\$	-	\$	-	\$	-
Other (please describe)	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-
Other (please describe)	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-
Other (please describe)	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-
Other (please describe)	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-
<b>Total Facilities</b>	\$	<b>4,400</b>	\$	<b>178,400</b>	\$	<b>254,119</b>	\$	<b>342,114</b>	\$	<b>433,010</b>	\$	<b>528,132</b>
<b>Other</b>												
Contingency	\$	-	\$	14,991	\$	19,146	\$	24,609	\$	30,124	\$	35,749
Indiana Charter School Board Administrative Fee	\$	-	\$	18,317	\$	27,475	\$	36,634	\$	45,792	\$	54,950
CMO/EMO Fee	\$											

Expected New School Annual Operating Budget and Cash Flow Projections -- YEAR 0 -- Pre-Opening Period

REVENUE	Jun-17	Jul-17	Aug-17	Sep-17	Oct-17	Nov-17	Dec-17	TOTAL 2017	Jan-18	Feb-18	Mar-18	Apr-18	May-18	Jun-18	TOTAL FIRST HALF 2018
<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)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other Revenue Federal sources (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Other Revenues</b>															
Committed Philanthropic Donations	-	327,500	2,500	2,500	2,500	2,500	2,500	340,000	2,500	2,500	2,500	2,500	2,500	2,500	15,000
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Total Revenue</b>	-	<b>327,500</b>	<b>2,500</b>	<b>2,500</b>	<b>2,500</b>	<b>2,500</b>	<b>2,500</b>	<b>340,000</b>	<b>2,500</b>	<b>2,500</b>	<b>2,500</b>	<b>2,500</b>	<b>2,500</b>	<b>2,500</b>	<b>15,000</b>
<b>EXPENDITURES</b>															
<b>Personnel Expenses</b>															
Wages, Benefits and Payroll Taxes (TOTAL must match "Staffing Year 0")	-	8,363	8,363	8,363	8,363	8,363	8,363	50,176	8,363	8,363	8,363	13,275	13,275	13,275	64,914
Professional Development	-	-	-	-	-	-	-	-	-	-	-	-	-	-	2,500
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Total Personnel Expenses</b>	-	<b>8,363</b>	<b>8,363</b>	<b>8,363</b>	<b>8,363</b>	<b>8,363</b>	<b>8,363</b>	<b>50,176</b>	<b>8,363</b>	<b>8,363</b>	<b>8,363</b>	<b>13,275</b>	<b>13,275</b>	<b>15,775</b>	<b>67,414</b>
<b>Instructional Supplies and Resources</b>															
Textbooks	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Library, periodicals, etc	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Technology	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Assessment materials	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Computers	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Software	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other classroom supplies	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Field trips, other unclassified items	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Co-curricular & Athletics	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
ELL Materials	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
SPED Materials	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Curriculum	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Uniforms	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Total Instructional Supplies and Resources</b>	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Support Supplies and Resources</b>															
Administrative Computers	-	850	-	-	-	-	-	850	-	-	-	850	-	-	850
Administrative Software	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Administration Dues, fees, misc expenses	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Office supplies	-	100	100	100	100	100	100	600	100	100	100	100	100	100	600
Copier Supplies	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Medical Supplies	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Custodial Supplies	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Background Fees	-	45	-	-	-	-	-	45	-	-	-	-	45	-	45
Copier Leases	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Total Support Supplies and Resources</b>	-	<b>995</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>1,495</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>995</b>	<b>100</b>	<b>100</b>	<b>1,495</b>
<b>Board Expenses</b>															
Charter Board Services, including Board Training, retreats	-	500	-	-	-	-	-	500	500	-	-	-	-	-	500
Charter Board Supplies & Equipment	-	100	100	100	100	100	100	600	100	100	100	100	100	100	600
Charter Board Dues, fees, etc	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Total Board Expenses</b>	-	<b>600</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>1,100</b>	<b>600</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>1,100</b>
<b>Professional Purchased or Contracted Services</b>															
Legal Services	-	5,000	-	-	-	-	-	5,000	-	-	-	-	-	-	-
Audit Services (compliant with SBOA requirements)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Payroll Services	-	42	42	42	42	42	42	252	42	42	42	42	42	42	252
Accounting Services	-	417	417	417	417	417	417	2,500	417	417	417	417	417	417	2,500
Printing/Newsletter/Annual Report Services	-	125	125	125	125	125	125	750	125	125	125	125	125	125	750
Consultants	-	1,100	1,100	1,100	1,100	1,100	1,100	6,600	1,100	1,100	1,100	1,100	1,100	1,100	6,600
Internet Services	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Telephone/Telecommunication Services	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Total Insurance Costs (per ICSB requirements detailed in charter school application)	-	2,500	-	-	-	-	-	2,500	-	-	-	-	-	-	-
Travel	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Postage	-	375	375	375	375	375	375	2,250	375	375	375	375	375	375	2,250
Special Education Services	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Student Information Services	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Food service	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Transportation	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Nursing Services	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (Please Describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Staff Recruitment, Student Recruitment, & Marketing	-	-	-	-	2,350	2,350	2,350	4,700	2,350	2,350	2,350	2,350	-	-	9,400
Teach for America Fees	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Technology Services	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Total Professional Purchased or Contracted Services</b>	-	<b>9,559</b>	<b>2,059</b>	<b>2,059</b>	<b>2,059</b>	<b>4,409</b>	<b>4,409</b>	<b>24,552</b>	<b>4,409</b>	<b>4,409</b>	<b>4,409</b>	<b>4,409</b>	<b>2,059</b>	<b>2,059</b>	<b>21,752</b>
<b>Facilities</b>															
Rent, mortgages, or other facility cost	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Furniture & Equipment	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Gas/electric	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Water Sewer	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Grounds Keeping	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Maintenance Services	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Custodial	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Waste disposal	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
IS&M Service for Facilities (Interest Only)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
IFF Fee	-	4,400	-	-	-	-	-	4,400	-	-	-	-	-	-	-
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other (please describe)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Total Facilities</b>	-	<b>4,400</b>	-	-	-	-	-	<b>4,400</b>	-	-	-	-	-	-	-
<b>Other</b>															
Contingency	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
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>	-	<b>23,916</b>	<b>10,621</b>	<b>10,621</b>	<b>10,621</b>	<b>12,971</b>	<b>12,971</b>	<b>81,723</b>	<b>13,471</b>	<b>12,971</b>	<b>12,971</b>	<b>18,779</b>	<b>15,534</b>	<b>18,034</b>	<b>91,761</b>
<b></b>															





Expected New School Annual Operating Budget – YEAR 1 – Fiscal Year July 1-June 30		
REVENUE	Amount	Notes
<b>State Revenue</b>		
Basic Grant	\$ 610,560	\$5,088 per student
State Matching Funds for School Lunch Program		
Professional Development		
Technology Grants		
Remediation Program		
Talented and Gifted Program		
Textbook Reimbursement		
Summer School		
Charter and Innovation Network School Grant Program	\$ 60,000	\$500 per Fall ADM for charter schools in their first 2 years of operations, or who receive an A, B, or C grade in the state's ranking system
Charter and Innovation Network School Advance Program		
Complexity Grant	\$ 276,042	product of 83,539 per student and complexity index, estimated at .65 <a href="http://www.gps.k12.in.us/cms/1b031N01000800/Centricity/Domain/1/ISBA%20Article%20-%20of%20finding%20Formula%20-%20Revised.docx">http://www.gps.k12.in.us/cms/1b031N01000800/Centricity/Domain/1/ISBA%20Article%20-%20of%20finding%20Formula%20-%20Revised.docx</a>
Special Education Funding for students with severe disabilities and mild/moderate	\$ 61,300	Total estimated sped population of 18%, with estimated 5% of the sped enrollment to have a severe disability generating \$8,800 per qualifying student and 95% of the sped enrollment to have a mild or moderate disability generating \$2,300 per qualifying student. <a href="http://www.gps.k12.in.us/cms/1b031N01000800/Centricity/Domain/1/ISBA%20Article%20-%20of%20finding%20Formula%20-%20Revised.docx">http://www.gps.k12.in.us/cms/1b031N01000800/Centricity/Domain/1/ISBA%20Article%20-%20of%20finding%20Formula%20-%20Revised.docx</a>
<b>Federal Revenue</b>		
Public Charter School Program (PCSP) Grant		estimated \$519.40 per SPED student counslee IDEA part B in ICSB startup manual, page 25: <a href="https://www.in.gov/icsb/files/ICSB_Startup_Manual.pdf">https://www.in.gov/icsb/files/ICSB_Startup_Manual.pdf</a>
Public Law 101-476 (IDEA)	\$ 10,907	estimated \$40 per FRL count
Title I	\$ 4,004	estimated \$40 per FRL count
Title II	\$ 4,080	estimated \$40 per FRL count
Federal Lunch Program	\$ 58,558	product of enrollment, FRL %, participation level %, attendance, and # of days and meal reimbursement rates for FY 2017
Federal Breakfast Reimbursement	\$ 37,746	product of enrollment, FRL %, participation level %, attendance, and # of days and meal reimbursement rates for FY 2017
Federal Snack Reimbursement	\$ 15,088	product of enrollment, FRL %, participation level %, attendance, and # of days and meal reimbursement rates for FY 2017
E-Rate	\$ 2,850	E-Rate: 40% of internet & telephone service only
<b>Other Revenues</b>		
Committed Philanthropic Donations	\$ 30,000	board fundraising
Before and After Care Fees		
Interest Income		
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Revenue</b>	<b>\$1,208,165</b>	
<b>EXPENDITURES</b>		
<b>Personnel Expenses</b>		
Wages, Benefits and Payroll Taxes	\$ 541,947	Use staffing workbook
Substitute Teachers	\$ 2,438	
Professional Development	\$ 2,438	
Bonuses		
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Personnel Expenses</b>	<b>\$ 548,384</b>	
<b>Instructional Supplies and Resources</b>		
Textbooks	\$ 12,000	\$100 per student
Library, periodicals, etc.	\$ 2,400	\$20 per student
Technology	\$ 8,100	\$50 per student- extra \$100 per SPED student
Assessment materials	\$ 18,800	\$156.67 per student
Computers	\$ 15,000	\$125 per student
Software	\$ 6,000	\$50 per student
Other classroom supplies	\$ 12,000	\$100 per student
Field trips, other unclassified items	\$ 1,200	\$15 per student
Co-curricular & Athletics	\$ 600	\$5 per student
ITL Materials	\$ 960	\$80 per ILL student
SPED Materials	\$ 1,850	\$48.01 per SPED student
Curriculum	\$ 24,000	\$200 per student
Uniforms	\$ 2,400	\$20 per student
Other (please describe)		
<b>Total Instructional Supplies and Resources</b>	<b>\$ 105,110</b>	
<b>Support Supplies and Resources</b>		
Administrative Computers	\$ 5,225	
Administrative Software		
Administration Dues, fees, misc. expenses	\$ 1,500	
Office supplies	\$ 4,800	\$40 per month
Copier Supplies	\$ 2,400	\$20 per student
Medical Supplies	\$ 150	\$1.25 per student
Custodial Supplies	\$ 2,400	\$20 per student
Background Fees	\$ 485	for new staff members
Copier Leases	\$ 4,620	\$385 per month
<b>Total Support Supplies and Resources</b>	<b>\$ 21,800</b>	
<b>Board Expenses</b>		
Charter Board Services, including Board Training, retreats	\$ 1,000	2 trainings/\$500 each
Charter Board Supplies & Equipment	\$ 1,200	\$100/month
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>\$ 2,200</b>	
<b>Professional Purchased or Contracted Services</b>		
Legal Services	\$ 5,000	
Audit Services (compliant with SHRA requirements)	\$ 10,000	
Payroll Services	\$ 1,732	\$144 month
Accounting Services	\$ 60,000	\$5000 per month
Printing/Newsletter/Annual Report Services	\$ 1,500	
Consultants	\$ 10,000	BES follow on support
Interest Services	\$ 2,400	\$200 per month
Telephone/Telecommunication Services	\$ 1,200	\$100 per month
Total Insurance Costs (per ICSB requirements detailed in charter school application)	\$ 16,500	\$138 per student
Travel		
Postage	\$ 3,000	\$30 per student
Special Education Services	\$ 10,200	\$486.11 per sped student
Student Information Services	\$ 13,000	\$10K, setup; \$25 per student
Food service	\$ 116,460	\$971 per student
Transportation	\$ 3,000	\$25 per student
Nursing Services	\$ 3,000	\$25 per student
Other (Please Describe)		
Staff Recruitment, Student Recruitment & Marketing	\$ 13,100	
Teach for America Fees	\$ 10,000	2 teachers placed
Technology Services	\$ 12,300	\$1025 per month
<b>Total Professional Purchased or Contracted Services</b>	<b>\$ 289,692</b>	
<b>Facilities</b>		
Rent, mortgage, or other facility cost	\$ 108,000	\$9 per square foot
Furniture & Equipment	\$ 16,400	\$137 per student; includes budget for office and classroom furniture
Gas/electric	\$ 18,000	\$1.5 per square foot
Water Sewer	\$ 3,000	\$0.25 per square foot
Grounds Keeping	\$ 3,000	\$0.25 per square foot
Maintenance Services	\$ 6,000	\$0.75 per square foot
Custodial	\$ 21,000	\$1.75 per square foot
Waste disposal	\$ 3,000	\$0.25 per square foot
Debt Service for Facilities (Interest Only)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Facilities</b>	<b>\$ 178,400</b>	
<b>Other</b>		
Contingency	\$ 14,991	3% on non payroll expenses
Indiana Charter School Board Administrative Fee	\$ 18,217	3% of basic grant
C/MO/EMO Fee		N/A C/MO Fee
Charter and Innovation Network School Advance Program		
Interest Costs		No anticipated advance required
Escrow account for disillusionment / closure	\$ -	\$10K per year starting year 2 through year 4 to reach a \$30K escrow balance
Other (please describe)		
Other (please describe)		
<b>Total Other</b>	<b>\$ 33,208</b>	
<b>Total Expenditures</b>	<b>\$1,174,894</b>	
<b>Carryover/Deficit</b>	<b>\$ 33,270</b>	

Cumulative Carryover/(Deficit)



Expected New School Annual Operating Budget – YEAR 2 – Fiscal Year July 1-June 30		
REVENUE	Amount	Notes
<b>State Revenue</b>		
Basic Grant	\$ 913,840	\$5,088 per student
State Matching Funds for School Lunch Program		
Professional Development		
Technology Grants		
Remediation Program		
Talented and Gifted Program		
Textbook Reimbursement		
Summer School		
Charter and Innovation Network School Grant Program	\$ 90,000	\$500 per Full ADM for charter schools in their first 2 years of operations, or who receive an A, B, or C grade in the state's ranking system
Charter and Innovation Network School Advance Program		
Complexity Grant	\$ 414,063	product of \$3,539 per student and complexity index, estimated at .65 <a href="http://www.cps.k12.in.us/cms/lib03/IN01000800/Ceintricity/Domain1/ISBA%20article%20-%20finding%20formula%20-%20noted.docx">http://www.cps.k12.in.us/cms/lib03/IN01000800/Ceintricity/Domain1/ISBA%20article%20-%20finding%20formula%20-%20noted.docx</a>
Special Education Funding for students with severe disabilities and mild/moderate	\$ 101,900	Total estimated sped population of 18%, with estimated 5% of the sped enrollment to have a severe disability generating \$8,800 per qualifying student and 95% of the sped enrollment to have a mild or moderate disability generating \$2,300 per qualifying student. <a href="http://www.cps.k12.in.us/cms/lib03/IN01000800/Ceintricity/Domain1/ISBA%20article%20-%20finding%20formula%20-%20noted.docx">http://www.cps.k12.in.us/cms/lib03/IN01000800/Ceintricity/Domain1/ISBA%20article%20-%20finding%20formula%20-%20noted.docx</a>
<b>Federal Revenue</b>		
Public Charter School Program (PCSP) Grant		estimated \$519.40 per SPED student course; IDEA part B in R-5B startup manual, page 25; <a href="https://www.in.gov/scr/files/R-5B_StartUp_Manual.pdf">https://www.in.gov/scr/files/R-5B_StartUp_Manual.pdf</a>
Public Law 101-476 (IDEA)	\$ 17,140	estimated \$402 per FRL count
Title I	\$ 61,506	estimated \$40 per FRL count
Title II	\$ 6,120	product of enrollment, FRL %, participation level %, attendance, and # of days and meal reimbursement rates for FY 2017
Federal Lunch Program	\$ 87,836	product of enrollment, FRL %, participation level %, attendance, and # of days and meal reimbursement rates for FY 2017
Federal Breakfast Reimbursement	\$ 56,619	product of enrollment, FRL %, participation level %, attendance, and # of days and meal reimbursement rates for FY 2017
Federal Snack Reimbursement	\$ 22,631	product of enrollment, FRL %, participation level %, attendance, and # of days and meal reimbursement rates for FY 2017
E-Rate	\$ 2,930	E-Rate: 80% of internet & telephone service only
<b>Other Revenues</b>		
Committed Philanthropic Donations	\$ 30,000	board fundraising
Before and After Care Fees		
Interest Income		
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Revenue</b>	\$1,806,586	
<b>EXPENDITURES</b>		
<b>Personnel Expenses</b>		
Wages, Benefits and Payroll Taxes	\$ 847,550	
Substitute Teachers		
Professional Development	\$ 3,816	
Bonuses		
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Personnel Expenses</b>	\$ 851,366	
<b>Instructional Supplies and Resources</b>		
Textbooks	\$ 18,313	\$101.75 per student
Library, periodicals, etc.	\$ 1,663	\$7.35 per student
Technology	\$ 6,410	\$50 per student; extra \$100 per SPED student
Assessment materials	\$ 7,326	\$40.7 per student
Computers	\$ 2,631	\$42.4 per student
Software	\$ 9,158	\$50.88 per student
Other classroom supplies	\$ 18,313	\$101.75 per student
Field trips, other unclassified items	\$ 2,747	\$15.26 per student
Co-curricular & Athletics	\$ 918	\$5.09 per student
ELL Materials	\$ 1,465	\$50.88 per ELL student
SPED Materials	\$ 1,119	\$54.54 per SPED student
Curriculum	\$ 36,630	\$204 per student
Uniforms	\$ 5,663	\$20 per student
Other (please describe)		
<b>Total Instructional Supplies and Resources</b>	\$ 117,358	
<b>Support Supplies and Resources</b>		
Administrative Computers	\$ 4,541	
Administrative Software		
Administration Dues, fees, misc. expenses	\$ 2,000	
Office supplies	\$ 4,884	\$807 per month
Copier Supplies	\$ 1,663	\$73.35 per student
Medical Supplies	\$ 229	\$1.27 per student
Custodial Supplies	\$ 1,663	\$20.35 per student
Background Fees	\$ 223	for new staff members
Copier Leases	\$ 9,402	\$783.48 per month
<b>Total Support Supplies and Resources</b>	\$ 28,606	
<b>Board Expenses</b>		
Charter Board Services, including Board Training, retreats	\$ 1,000	2 trainings/\$500 each
Charter Board Supplies & Equipment	\$ 1,200	\$100/month
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>	\$ 2,200	
<b>Professional Purchased or Contracted Services</b>		
Legal Services	\$ 5,000	
Audit Services (compliant with SDEA requirements)	\$ 10,000	
Payroll Services	\$ 1,866	\$153 month
Accounting Services	\$ 60,000	\$5000 per month
Printing/Newsletter/Annual Report Services	\$ 1,528	
Consultants	\$ 10,000	BES Follow on Support
Interest Services	\$ 2,443	\$204 per month
Telephone/Felcommunication Services	\$ 1,221	\$102 per month
Fatal Insurance Cost (per ICSB requirements detailed in charter school application)	\$ 19,841	\$110 per student
Travel		
Postage	\$ 4,500	\$40 per student
Special Education Services	\$ 16,789	\$518.17 per sped student
Student Information Services	\$ 4,500	\$25 per student
Food service	\$ 17,747	\$907 per student
Transportation		
Nursing Services	\$ 4,579	\$25 per student
Other (Please Describe)		
Staff Recruitment, Student Recruitment, & Marketing	\$ 16,213	
Teach for America Fees	\$ 10,000	2 teachers placed
Technology Services	\$ 13,528	\$1127 per month
<b>Total Professional Purchased or Contracted Services</b>	\$ 359,750	
<b>Facilities</b>		
Rent, mortgage, or other facility cost	\$ 164,835	\$9.16 per square foot
Furniture & Equipment	\$ 7,024	\$117 per new student
Electricity	\$ 27,471	\$1.51 per square foot
Water Sewer	\$ 4,579	\$0.25 per square foot
Grounds Keeping	\$ 4,579	\$0.25 per square foot
Maintenance Services	\$ 9,000	\$0.75 per square foot
Custodial	\$ 32,051	\$1.78 per square foot
Waste disposal	\$ 4,579	\$0.25 per square foot
Dish Service for Facilities (Interest Only)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Facilities</b>	\$ 254,119	
<b>Other</b>		
Contingency	\$ 19,146	3% on non payroll expenses
Indiana Charter School Board Administrative Fee	\$ 27,475	3% of basic grant
CMO/EMO Fee		No CMO Fee
Charter and Innovation Network School Advance Program		
Interest Costs		No anticipated advance required
Escrow account for dissolution / closure	\$ 10,000	\$10K per year starting year 2 through year 4 to reach a \$30K escrow balance
Other (please describe)		
Other (please describe)		
<b>Total Other</b>	\$ 56,621	
<b>Total Expenditures</b>	\$1,670,020	
<b>Carryover/Deficit</b>	\$ 136,566	

Cumulative Carryover/(Deficit)







Expected New School Annual Operating Budget -- YEAR 4 -- Fiscal Year July 1-June 30		
REVENUE	Amount	Notes
<b>State Revenue</b>		
Basic Grant	\$1,526,400	\$5.08 per student
State Matching Funds for School Lunch Program		
Professional Development		
Technology Grants		
Remediation Program		
Talented and Gifted Program		
Textbook Reimbursement		
Summer School		
Charter and Innovation Network School Grant Program	\$	\$500 per Fall ADM for charter schools in their first 2 years of operations, or who receive an A, B, or C grade in the state's ranking system
Charter and Innovation Network School Advance Program		
Complexity Grant	\$ 690,105	product of \$3,539 per student and complexity index, estimated at .65 http://www.sps.k12.in.us/cms/1b6031d01000800Cc/mrncity/Thomas1/ISSA%20Article%20-%2020Funding%20Formal%20-%2020%20defined.docx Total estimated sped population at 18%, with estimated 5% of the sped enrollment to have a severe disability generating \$8,800 per qualifying student and 95% of the sped enrollment to have a mild or moderate disability generating \$2,300 per qualifying student. http://www.sps.k12.in.us/cms/1b6031d01000800Cc/mrncity/Thomas1/ISSA%20Article%20-%2020Funding%20Formal%20-%2020%20defined.docx
Special Education Funding for students with severe disabilities and mild/moderate	\$ 163,200	
<b>Federal Revenue</b>		
Public Charter School Program (PCSP) Grant		
Public Law 101-476 (IDEA)	\$ 28,048	estimated \$519.40 per SPED student comprise IDEA part B in ICSB starting manual, page 25: https://www.in.gov/ed/office/ICSB_Startup_Manual.pdf
Title I	\$ 102,510	estimated \$402 per FRL count
Title II	\$ 10,200	estimated \$40 per FRL count
Federal Lunch Program	\$ 146,394	product of enrollment, FRL %, participation level %, attendance, and # of days and meal reimbursement rates for FY 2017
Federal Breakfast Reimbursement	\$ 94,365	product of enrollment, FRL %, participation level %, attendance, and # of days and meal reimbursement rates for FY 2017
Federal Snack Reimbursement	\$ 37,719	product of enrollment, FRL %, participation level %, attendance, and # of days and meal reimbursement rates for FY 2017
E-Rate	\$ 3,034	E-Rate: 80% of internet & telephone service only
<b>Other Revenues</b>		
Committed Philanthropic Donations	\$ 30,000	board committed fundraising
Before and After Care Fees		
Interest Income		
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Revenue</b>	\$2,831,974	
<b>EXPENDITURES</b>		
<b>Personnel Expenses</b>		
Wages, Benefits and Payroll Taxes	\$1,506,245	
Substitute Teachers		
Professional Development	\$ 6,579	
Bonuses		
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Personnel Expenses</b>	\$1,513,224	
<b>Instructional Supplies and Resources</b>		
Textbooks	\$ 31,603	\$105.34 per student
Library, periodicals, etc.	\$ 6,321	\$21.07 per student
Technology	\$ 8,849	\$50 per student; extra \$100 per SPED student
Assessment materials	\$ 12,641	\$42.14 per student
Computers	\$ 7,901	\$26.34 per student
Software	\$ 15,801	\$52.61 per student
Other classroom supplies	\$ 31,603	\$105.34 per student
Field trips, other unclassified items	\$ 4,240	\$14.14 per student
Co-curricular & Athletics	\$ 1,580	\$5.27 per student
ELL Materials	\$ 2,528	\$8.26 per ELL student
SPED Materials	\$ 1,138	\$37.07 per SPED student
Curriculum	\$ 63,205	\$211 per student
Uniforms	\$ 6,321	\$21 per student
Other (please describe)		
<b>Total Instructional Supplies and Resources</b>	\$ 194,230	
<b>Support Supplies and Resources</b>		
Administrative Computers	\$ 5,596	
Administrative Software		
Administration Dues, fees, misc. expenses	\$ 2,000	
Office supplies	\$ 5,056	\$42.37 per month
Copier Supplies	\$ 6,321	\$21.07 per student
Medical Supplies	\$ 395	\$1.32 per student
Custodial Supplies	\$ 6,321	\$21.07 per student
Background Fees	\$ 270	for new staff members
Copier Leases	\$ 14,600	\$1216.7 per month
<b>Total Support Supplies and Resources</b>	\$ 40,259	
<b>Board Expenses</b>		
Charter Board Services, including Board Training, retreats	\$ 1,000	2 trainings/\$500 each
Charter Board Supplies & Equipment	\$ 1,200	\$100/month
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>	\$ 2,200	
<b>Professional Purchased or Contracted Services</b>		
Legal Services	\$ 10,000	
Adult Services (compliant with IDEA requirements)	\$ 10,000	
Payroll Services	\$ 2,158	\$170 month
Accounting Services	\$ 65,000	\$541.7 per month
Printing/Newsletter/Annual Report Services	\$ 1,665	
Consultants	\$	
Interest Services	\$ 2,528	\$8.26 per month
Telephone/Telecommunication Services	\$ 1,264	\$105 per month
Fatal Insurance Cost (per ICSB requirements detailed in charter school application)	\$ 24,755	\$83 per student
Travel	\$	
Postage	\$ 7,500	\$30 per student
Special Education Services	\$ 28,442	\$284.71 per sped student
Student Information Services	\$ 7,500	\$25 per student
Food service	\$ 406,704	\$1022 per student
Transportation	\$	
Nursing Services	\$ 7,901	\$26 per student
Other (Please Describe)	\$	
Staff Recruitment, Student Recruitment, & Marketing	\$ 23,000	
Teach for America Fees	\$ 10,000	2 teachers placed
Technology Services	\$ 19,580	\$1622 per month
<b>Total Professional Purchased or Contracted Services</b>	\$ 527,098	
<b>Facilities</b>		
Rent, mortgage, or other facility cost	\$ 284,425	\$9.48 per square foot
Furniture & Equipment	\$ 7,174	\$120 per new student
Gas/Electricity	\$ 47,404	\$1.53 per square foot
Water Sewer	\$ 7,901	\$0.26 per square foot
Grounds Keeping	\$ 7,901	\$0.26 per square foot
Maintenance Services	\$ 15,000	\$0.75 per square foot
Custodial	\$ 55,305	\$1.84 per square foot
Waste disposal	\$ 7,901	\$0.26 per square foot
Dish Service for Facilities (Interest Only)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
Other (please describe)		
<b>Total Facilities</b>	\$ 433,010	
<b>Other</b>		
Contingency	\$ 30,124	3% on non payroll expenses
Indiana Charter School Board Administrative Fee	\$ 45,792	3% of basic grant
CMO/EMO Fee		No CMO Fee
Charter and Innovation Network School Advance Program		
Interest Costs		No anticipated advance required
Factor account for dissolution / closure	\$ 10,000	\$108 per year starting year 2 through year 4 to reach a \$0K reserve balance
Other (please describe)		
Other (please describe)		
<b>Total Other</b>	\$ 85,916	
<b>Total Expenditures</b>	\$2,797,139	
<b>Carryover/Deficit</b>	\$ 34,836	

Cumulative Carryover (Deficit)









**SUMMARY  
Revenue**

IDOE Basic Grant  
Federal Categorical Funding  
State Categorical Funding  
Private Grants, Donations, & Fundraising  
**Total Revenue**

2017-18	2018-19	2019-20	2020-21	2021-22	2022-23
Preliminary Forecast	Preliminary Forecast	Preliminary Forecast	Preliminary Forecast	Preliminary Forecast	Preliminary Forecast

-	610,560	915,840	1,221,120	1,526,400	1,831,680
-	170,263	254,783	338,266	422,269	506,274
-	397,342	605,963	683,484	853,305	1,023,126
355,000	30,000	30,000	30,000	30,000	30,000
<b>355,000</b>	<b>1,208,165</b>	<b>1,806,586</b>	<b>2,272,870</b>	<b>2,831,974</b>	<b>3,391,080</b>

**Expenses**

Salaries & Wages  
Benefits  
Supplies, Materials, & Equipment  
Professional Services and Travel  
Utilities, Insurance, Rent & Leasehold Improvements  
Miscellaneous  
**Total Expenses (excluding Capitalization & Depreciation)**

97,000	436,500	680,340	910,090	1,196,512	1,481,308
18,090	105,447	167,210	230,320	309,733	388,081
11,190	133,610	154,191	201,277	246,154	290,881
47,204	287,630	357,539	440,969	525,813	610,940
-	178,400	254,119	342,114	433,010	528,132
-	33,308	56,621	71,243	85,916	90,699
<b>173,484</b>	<b>1,174,894</b>	<b>1,670,020</b>	<b>2,196,012</b>	<b>2,797,139</b>	<b>3,390,041</b>

**Operating Income (EBIDA)**

<b>181,516</b>	<b>33,270</b>	<b>136,566</b>	<b>76,858</b>	<b>34,836</b>	<b>1,038</b>
----------------	---------------	----------------	---------------	---------------	--------------

**Fund Balance**

Beginning Balance (Unaudited)

-	181,516	214,787	351,353	428,211	463,046
---	---------	---------	---------	---------	---------

**Ending Fund balance**

<b>181,516</b>	<b>214,787</b>	<b>351,353</b>	<b>428,211</b>	<b>463,046</b>	<b>464,085</b>
----------------	----------------	----------------	----------------	----------------	----------------

Operating Income as % of Total Revenues	51.1%	2.8%	7.6%	3.4%	1.2%	0.0%
Fund Balance as % of Revenues	51.1%	17.8%	19.4%	18.8%	16.4%	13.7%
Operating Income as % of Total Expenses	104.6%	2.8%	8.2%	3.5%	1.2%	0.0%
Fund Balance as % of Expenses	104.6%	18.3%	21.0%	19.5%	16.6%	13.7%
Total Revenue Per Student	\$0	\$10,068	\$10,037	\$9,470	\$9,440	\$9,420
Total Spending Per Student	\$0	\$9,791	\$9,278	\$9,150	\$9,324	\$9,417

Analytics						
	Year 0	Year 1	Year 2	Year 3	Year 4	Year 5
			Change from Prior Year			
IDOE Basic Grant		N/a	50%	33%	25%	20%
Federal Categorical Funding		N/a	50%	33%	25%	20%
State Categorical Funding		N/a	53%	13%	25%	20%
Private Grants, Donations, & Fundraising		N/a	0%	0%	0%	0%
<b>Total Revenues</b>		N/a	50%	26%	25%	20%
			Change from Prior Year			
Salaries & Wages		N/a	56%	34%	31%	24%
Benefits		N/a	59%	38%	34%	25%
Supplies, Materials, & Equipment		N/a	15%	31%	22%	18%
Professional Services and Travel		N/a	24%	23%	19%	16%
Utilities, Insurance, Rent & Leasehold Improvements		N/a	42%	35%	27%	22%
Miscellaneous		N/a	70%	26%	21%	6%
			% of Spending			
Salaries & Wages	56%	37%	41%	41%	43%	44%
Benefits	10%	9%	10%	10%	11%	11%
Supplies, Materials, & Equipment	6%	11%	9%	9%	9%	9%
Professional Services and Travel	27%	24%	21%	20%	19%	18%
Utilities, Insurance, Rent & Leasehold Improvements	0%	15%	15%	16%	15%	16%
Miscellaneous	0%	3%	3%	3%	3%	3%



**Allegiant Preparatory Academy Charter School**  
 Payroll Assumptions  
 As of 3/21/2017

	Start-Up Year	Year 1	Year 2	Year 3	Year 4	Year 5	
	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	Notes

Annual COLA Increase	0.0%	0.0%	2.0%	2.0%	2.0%	2.0%	to account for both COLA and Performance based adjustments
Effective Payroll Increase	100.0%	100.0%	102.0%	104.0%	106.1%	108.2%	

School Leader	1	1	1	1	1	1
Dean of Students (K-4)	0	0	0	0	1	1
Dean of Students (5-8)	0	0	0	0	0	0
Dean of Curriculum & Instruction (k-4)	0	0	1	1	1	1
Dean of Curriculum & Instruction (5-8)	0	0	0	0	0	1
Operations Manager	0.25	1	1	1	1	1
Office Manager & Clerical Staff	0	0.75	1	1	2	2
Social Workers	0	0	0	0.25	0.5	1
Coordinator of Student Supports	0	0	0	0	1	1
Special Education Teacher	0	1	2	3	3	3
Elective Teachers	0	0	0	1	1	2
Classroom Teachers	0	4	6	8	10	13
Co-Teachers	0	2	3	4	5	5
<b>Total # of Staff</b>	1.25	9.75	15	20.25	26.5	32
Change in Staff Count	1.25	8.5	5.25	5.25	6.25	5.5

	Salary	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23
School Leader	\$85,000	85,000	85,000	86,700	88,434	90,203	92,007
Dean of Students (K-4)	\$50,000	-	-	-	-	53,060	54,122
Dean of Students (5-8)	\$50,000	-	-	-	-	-	-
Dean of Curriculum & Instruction (k-4)	\$60,000	-	-	61,200	62,424	63,672	64,946
Dean of Curriculum & Instruction (5-8)	\$60,000	-	-	-	-	-	64,946
Operations Manager	\$48,000	12,000	48,000	48,960	49,939	50,938	51,957
Office Manager & Clerical Staff	\$30,000	-	22,500	30,600	31,212	31,824	32,436
Social Workers	\$47,000	-	-	-	12,225	24,938	50,874
Coordinator of Student Supports	\$43,000	-	-	-	-	45,632	46,545
Special Education Teacher	\$45,000	-	45,000	91,800	140,454	143,263	146,128
Elective Teachers	\$33,000	-	-	-	34,333	35,020	71,441
Classroom Teachers	\$41,500	-	166,000	253,980	345,413	440,401	583,972
Co-Teachers	\$35,000	-	70,000	107,100	145,656	185,711	189,426
<b>Total Salaries</b>		97,000	436,500	680,340	910,090	1,196,512	1,481,308
Substitutes	\$0	-	-	-	-	-	-
Stipends	\$0	-	-	-	-	-	-
<b>Total Compensation</b>		97,000	436,500	680,340	910,090	1,196,512	1,481,308

Medical, Dental, & Vision Annual Increase	\$5,000	6,250	51,188	82,688	117,210	161,055	204,205	average across employees that employer pays; may or may not require some employee subsidization depending on specific
Effective Increase		100.00%	105.00%	110.25%	115.76%	121.55%	127.63%	
SSI	6.20%	6,014	27,063	42,181	56,426	74,184	91,841	
Medicare	1.45%	1,407	6,329	9,865	13,196	17,349	21,479	
Retirement	3%	2,910	13,095	20,410	27,303	35,895	44,439	401K or 403B plan; may want to require an employee match to trigger
Unemployment	2.50%	297	2,316	3,563	4,809	6,294	7,600	assessed on first \$9,500 per calendar year, IN new employer rate is 2.5%
Workers Compensation	1.25%	1,213	5,456	8,504	11,376	14,956	18,516	depends on policy rating
FUTA	0.00%	-	-	-	-	-	-	expected to be a 501c3 org





**ALLEGIANT PREP**  
ACADEMY

# Attachment 16

Budget Narrative



**Attachment 16: Budget Narrative.** Please provide, as Attachment 16, a detailed budget narrative that provides a high-level summary of the budget and how the budget aligns with the 5-Year business plan. The budget narrative should clearly describe assumptions and revenue estimates, including but not limited to the basis for Per-Pupil Revenue projections, staffing levels, facilities expenses, and technology costs. The narrative should specifically address:

- a) The degree to which the school budget will rely on variable income (e.g., grants, donations, fundraising).
  - b) The school's contingency plan to meet financial needs if anticipated revenues are not received or are lower than the estimated budget.
  - c) How the school will ensure it has sufficient funds to cover all anticipated expenses, including but not limited to: (a) start-up costs, (b) any special education costs incurred, (c) any transportation costs necessary to ensure the school will be accessible for all enrolled students, and (d) required retirement plan contributions.
- 

## **Annual Budget**

Allegiant Preparatory Academy has prepared a startup and 5-year budget to reflect the proposed educational plan and model. The multiyear budget was prepared using conservative revenue and expense assumptions whenever possible, with consultation of experts in the charter school budgeting and finance field for charter schools. There is no fundraising assumption or funding that is otherwise unsecured. Each fiscal year, the budget reflects a positive operating income and a growing fund balance to provide the school with opportunity to absorb unforeseen financial circumstances. By the end of the first year, fund balance is roughly equivalent to two months operating cash and by the fifth year of operations, fund balance is about four months operating cash.

**Revenue Planning.** Allegiant Preparatory has estimated revenue rates to remain flat year over year, based on starting enrollment of 120 Kindergarten and 1<sup>st</sup> graders and the goal of adding 60 new students and one new grade level each year to reach a final enrollment of 360 students for grades K through 5. The budget relies on an anticipated Walton Family Foundation Start-Up Grant of \$325,000, secured in partnership with Building Excellent Schools, and a \$30,000 annual board fundraising commitment. A letter of commitment regarding the Walton Family Foundation Grant can be found on **page 5**.

The recurring public revenue projections are based on the most recent funding assumptions available to charter applicants, and when otherwise unavailable, the assumptions being used for schools operating during FY 2017. Allegiant Preparatory also consulted with various individuals working with Indiana charter school funding, as well as prior applicant budgets and available online resources on public school funding in Indiana.

The main per pupil assumption for basic funding used was \$5,088 per student. In addition, Allegiant Prep also included an assumption for the Charter & Innovation Grant of \$500 per student for the first two years with the understanding that continued eligibility is predicated on receiving an A, B, or C grade in the state ranking system. The budget includes an assumption of Complexity Grant funding of \$3,539 per student, which was prorated by a factor of 0.65. All the available guidance suggested Allegiant could budget for the full \$3,539 per student, but out of conservatism, it has incorporated a hedge of 0.65 to account for the complexity factor's impact.

Allegiant Preparatory included an assumption for state special education funding for various types of need levels. It assumed that special education students constituted 18% of the enrollment in a given year, with an estimated 5% of the special education students having a severe disability generating \$8,800 per

qualifying student and 95% of special education students having a mild or moderate disability generating \$2,300 per qualifying student.

Allegiant Preparatory budgeted for Title I and Title II allocations, of \$402 and \$40 per qualifying student, respectively, tied to an assumption of qualifying students being free and reduced lunch students estimated at approximately 85%. Allegiant also expects to receive IDEA funding at \$519.40 per eligible special education student, as well as an E-Rate reimbursement of telecommunication services at 80%. Allegiant Preparatory has planned also for NSLP revenues and greater than offsetting costs of implementing the National School Lunch Program, as well as the breakfast and snack programs. Revenues have been projected based on assumption around meals served to eligible students and the FY 2017 federal reimbursement rates, using the anticipated student FRL profile, number of days and attendance rates, and likelihood of participating to project the impact.

As laid out previously, for all revenue assumptions, Allegiant Preparatory did not incorporate any standard rate increases year over year. Without more concrete budget information at the state and federal level, Allegiant Prep believes this to be the most prudent course of budget planning.

**Expense Planning.** Personnel costs, benefit costs, and employer liability costs, are around 52 % of the anticipated spending during the first 5 years for Allegiant Prep, or an average of \$4.5K in spending per student per year. The staffing plan ties to the proposed personnel plan and the phase-in of those positions over time. Allegiant Preparatory leveraged salary ranges from other charter school budgets. The largest staffing category, teachers, has an average salary of \$41.5K, noting that Allegiant will likely have individuals below and above that average depending on experience. Other roles have also been budgeted, specifically around administrative functions, social workers, and electives. On average, 67% of the proposed personnel spending is going towards instructional roles.

When Allegiant Preparatory opens, it plans to have a staff of 9.75 in 2018-19 and grow to a final staff of 32 in 2022-23. This staffing plan represents a minimum level that will otherwise be evaluated and revisited should more resources be available. Salaries are budgeted to increase 2% year over year starting 2019-20.

Allegiant Prep budgeted a 3% assumption for employer contributions to retirement, as well as the assumption of Allegiant Preparatory contributing, on average, \$5,000 per employee toward medical, dental, and vision benefits, which is assumed to increase year over year by 5%. It also budgeted for Social Security, Medicare, and state unemployment insurance at currently established rates (6.2% of wages, 1.45% of wages, and 2.5% of the first \$9,500 per employee). Workers' compensation insurance was also budgeted at 1.25% of total wages. In addition to evaluating compensation levels, Allegiant Prep will review employer benefits to ensure it is competitive with other schools. Finally, it has budgeted a recurring line item of professional development of \$250 per FTE, increasing by 1.75% year over year, though it has capacity in its budget to spend more. Our understanding is that per IC 20-24-6-7, participation in the state retirement systems is not required if a private alternative is offered. We have initially planned to participate in a private retirement plan, but if there is a demonstrated interest and continued financial capacity, we may explore participating in TRF and PERF.

Instructional supplies and resources have been built around the academic and programmatic requirements of the proposed charter school, also growing by 1.75% year over year when it made sense. The driver for spending in a given year was either the number of students or the number of new students

being added. In the first year, spending in this part of the budget averages around \$875/student, but then transitions to about a \$650 average per student each year.

Allegiant has also budgeted for administrative costs including for staff computers (\$850/staff member), as well as office materials, supplies, copier leases, and copy supplies.

Having a board that can effectively oversee the school is extremely critical. To that end, it has budgeted for board meeting materials (\$100/month) and board training (\$1K per year), and it should note it intends to also contract with BES to provide follow on support in Years 0, 1, and 2, which includes board governance and professional development support at \$10K each year.

Professional services and contracted services have been developed using other schools' budgets and vendor quotes. Allegiant has ensured the budget has the requisite amounts set aside for insurance, back-office services, technology consulting, student information, food service and nursing. Over the five years, this part of the budget averages around \$1.9K per year, starting around \$2.4K in Year 1 and reaching \$1.7K in Year 5, suggesting increased economies of scale as the school reaches full size.

Allegiant Preparatory in the process of identifying a final facility. For the purposes of the budget and without a set option, a \$9 per square foot assumption has been budgeted for a space that is otherwise move in ready, increasing by 1.75% year over year. Janitorial services have also been budgeted at \$2/square foot and utilities have been budgeted at \$2/square foot, with a budget set aside to furnish classrooms and office spaces.

Allegiant has also included in its budget each year a 3% administrative fee assessed on its basic funding and a contingency reserve, equal to 3% of all non-personnel spending. In Years 2 through 4, Allegiant also funds a dissolution reserve of \$10,000 each year to reach \$30,000 by Year 4.

**Annual Audit.** Financial statements audited annually by independent audit firm, identified by Board via a recommendation from the Finance Committee; audit firm will be hired by June 30<sup>th</sup>, will perform audit before the start of the new fiscal year; Audit includes: accuracy of school's financial statements, attendance accounting, revenue accuracy practices, and the school's internal controls.

**Processing Controls.** Source document matching; clerical accuracy of documents; general ledger account code checking.

**Reconciliation.** Process of checking for errors after transactions have been posted and general ledger has been run.

**Securing Financial Data.** Accounting software accessible to Head of School, Operations Manager, Back Office Provider; each will have separate log-in credentials; hard copies of financial data will be in a locked and secured cabinet within the school.

**Risk Management.** Mitigating risk involving internal and/or external factors that might adversely affect the ability to properly record, process, summarize, and report financial data.

- a) **Variable Income.** With the goal of developing a conservative budget, Allegiant Preparatory has not incorporated any revenues that is otherwise variable or unsecured. All state and federal revenues have a reasonable basis for inclusion in the budget because they are otherwise revenue streams accessible to Allegiant Preparatory whether by formula or standard allocation. Allegiant Preparatory did include an assumption for \$325,000 from Walton Family Foundation (WFF) to fund start-up activity and provide additional support for the school's budget going into its first year of operations. A letter stating the commitment from WFF can be found on **page 5** of this attachment. It also included an assumption of \$30,000 in board secured fundraising.
- b) **Contingency Plan** As mentioned earlier, Allegiant Prep has budgeted a 2.5% contingency reserve, as well as ample projected fund balances to absorb the impact of potential revenue shortfalls. If Allegiant Preparatory encounters some financial difficulties in the form of a budget shortfall, such as higher facility costs, higher staffing expenses, or lower enrollment, it will use several strategies to make up the shortfall, including but not limited to:
- Staffing plan revisions: Outside of instructional staff, administrative and leadership staff may have to be deferred or eliminated entirely.
  - Salary reduction: Salaries would need to be within the means of the organization, which might make the school less competitive in hiring.
  - Benefits reduction: The school would have to revisit employer contributions to employee benefits
  - Technology and furniture purchasing vs. leasing: The school would have to evaluate if there were cost savings to potentially lease equipment and furniture and potentially lowering the student to computer ratio.
  - Scale back facility requirements: The school might have to reevaluate its intended square footage footprint to lower its lease and utility costs.
  - Group purchasing: Identify opportunities to partner up with other local schools to share costs or participate in national charter school purchasing collaboratives.

In addition to reducing internal spending, Allegiant Preparatory will explore supplemental revenue opportunities like outside grants and fundraising.

- c) **Plan to Cover Anticipated Expenses.** The startup budget calls for about \$173K in spending with the focus on getting the school's systems and processes up and running, as well as recruiting students and staff. It is only possible through the financial support of Walton Family Foundation, which Allegiant currently has no concerns about receiving. The recurring budget does include spending for special education students, and Allegiant acknowledges that it may need to earmark more funding for additional students' needs. With the current contingency line item each year, combined with an ample fund balance reserve, and an otherwise conservatively developed budget, Allegiant is confident it will be able to re-designate funding and resources toward serving special education students adequately. The budget already includes an assumption for 3% towards a 403b plan – it is not currently planning to participate in the state retirement system. Finally, it has not included any transportation spending, as that is provided through Indianapolis Public Schools.



March 24, 2017

Indiana Charter School Board

143 West Market Street, Suite 400

Indianapolis, IN 46204

Re: Commitment of Start-Up Funds to Allegiant Preparatory Academy Charter School

To Whom It May Concern:

We are pleased to inform you that the Walton Family Foundation, in partnership with Building Excellent Schools and the Building Excellent Schools Fellowship, will make available \$325,000 of start-up funds for the start-up year (fiscal year 2017-2018) of Allegiant Preparatory Academy Charter School upon charter authorization. These funds will be characterized as a \$325,000 grant.

The grant is given in support of the start-up needs of Allegiant Preparatory Academy Charter School and will be contingent upon authorization of Allegiant Preparatory Academy Charter School.

Sincerely,

A handwritten signature in black ink that reads "Linda Brown".

Linda Brown  
Chief Executive Officer



**ALLEGIANT PREP**  
ACADEMY

# Attachment 17

Existing Non-Profit Entity Financials  
(Not Applicable)