

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:** \_\_\_\_\_

**Proposed Charter School location:\*** \_\_\_\_\_

*\*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:** \_\_\_\_\_

**Legal name of group applying for Charter:** \_\_\_\_\_

**Designated representative:** \_\_\_\_\_

**Contact Information (Phone & Email):** \_\_\_\_\_

**Planned opening year for the school:** \_\_\_\_\_

**Model or focus of proposed school:**  
(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		
Year 2		
Year 3		
Year 4		
Year 5		
At Capacity		

**Target student population (if any):** \_\_\_\_\_

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):

\_\_\_\_\_

Planned submission date(s):

\_\_\_\_\_

Please list the number of previous submissions (including withdrawn submissions) for request to authorize any charter school(s) over the past five years, as required under IC § 20-24-3-4.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

Authorizer(s):

\_\_\_\_\_

Submission date(s):

\_\_\_\_\_

For Experienced Operator Applications:

Does the school expect to contract or partner with an ESP or other organization for Charter School management/operation? Yes  No

If Yes, please provide the following information:

Identify the ESP or partner organization.

Athlos Academies

Is Charter School proposing to replicate a proven school model? Yes  No

If yes, provide the name and location of at least one school where the model is in use.

Athlos Academy of Utah, Herriman, UT

If the applicant or its ESP or other partner organization currently operates one (1) or more Charter Schools within or without Indiana, please provide the name(s) and phone number(s) of the authorizer(s) for the existing Charter Schools:

Signature of Applicant's Designated Representative

Ashley Gibson  
Signature

9/6/17

Date



**Athlos Academy**  
INDIANA

# Charter Application

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**Athlos Academy of Indiana**

**Planned Opening:**

2019–2020 school year

**Board Chair:**

Ashley Gibson

[agibson@collegeboard.org](mailto:agibson@collegeboard.org)

**Presented to:**

Indiana Charter School Board

September 2017

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## Executive Summary

### Mission and Vision

Athlos Academy of Indiana's (AAI) mission is to provide a high-quality K-8 educational model based on Athlos Academies (ESP) three foundational pillars of Prepared Mind, Performance Character, and Healthy Body for students and families in Southeastern Marion County. The vision of the school is to foster students who will be prepared to embrace all challenges in life and who have developed critical thinking and problem-solving skills while achieving academic success. AAI believes that children have the best opportunity for success in college, career, and life when they are supported by high-quality programs in the three interconnected pillar areas.

The goal of AAI is to live the mission and vision every day on campus and in the community being served. The school's culture celebrates high academic achievement, fosters individual growth in wellness and Performance Character, and promotes regular family engagement. AAI's goal is for students to understand the importance of being lifelong learners, who value wellness in all aspects of his/her life, and who have strong social-emotional learning skills. AAI's students will graduate from their K-8 experience ready to become courageous, humble leaders who contribute to a better society and inspire others daily to live fulfilling, healthy, and successful lives. Further, the families and communities that AAI serves will be able to build upon and emulate the outcomes of the mission and vision in their lives as well.

AAI will be a K-8 school opening in the fall of 2019. Athlos Academies (ESP) will support AAI in its academics, marketing, governance, and facility development. Only once the school is established and has demonstrated consistent academic and operational success will AAI work with the Indiana Charter School Board (ICSB) and Athlos Academies (ESP) to consider replication or expansion opportunities.

### Educational Need and Target Population

AAI chose Southeastern Marion County to provide another educational option for families in the area. AAI will be open to all students, yet specifically aims to serve students and families in Perry Township, Center Township, Beech Grove, and Franklin Township. With the opening date of the 2019-2020 school year, the founding board of AAI will take the opportunity to work with its partner (Athlos Academies) and authorizer (Indiana Charter School Board) to review site options and select the most impactful geographic location for the school to serve this region of Indianapolis.

Families in center township have several school choice options from which to choose, while families residing in the county's outer townships have fewer options. Further, as growth continues in Southeast Marion County, families will be looking for more educational choices. AAI aims to attract families residing in suburbs of Indianapolis and in southern IPS as part of its recruitment plan. Families in the suburbs are increasingly finding affordable housing in these areas yet work in Indianapolis, and thus will be attracted to the model and may choose to enroll their children at AAI. Recruitment and enrollment areas will also extend to surrounding communities outside of Indianapolis. The surrounding area schools in Perry Township, Franklin Township, Indianapolis Public Schools (IPS), and Beech Grove have mixed academic success. Outside of IPS boundaries, the only schools of choice are parochial options. AAI will provide a public school of choice to this area. AAI aims to offer families from each of these school districts a high-quality, innovative option through which to ensure their children are healthy, balanced, and academically prepared for high school and post-secondary success.

By locating near multiple districts, AAI will be able to enroll students from the surrounding townships and schools of all kinds. Athlos will be able to attract families not just because of strong academic results but because AAI does promise to produce students who are well-prepared 21<sup>st</sup> century thinkers and who can contribute to their community in diverse ways. The school believes that part of its success in academics can only be achieved through a commitment to wellness and character as part of its holistic approach to preparing students to be the best they can be. AAI will be able to draw students from schools such as those demonstrated in the chart below that have had different student achievement results. The chart includes schools from Beech Grove, Franklin Township, IPS, and Perry Meridian and represents a variety of school types to demonstrate AAI’s knowledge of the community being served. The information below is from the Indiana Department of Education’s (IDOE) *Compass School: and Corporation Data*. Enrollment and grade level comes from the 2016-17 school year and the achievement data is from the 2015-16 school year due to the most recent data not being available publicly.

School Name and Type	District or Location	Grades Served and Enrollment	Report Card Letter Grade	ISTEP Student Performance on Mathematics vs. State Average	ISTEP Student Performance on English language arts vs. State Average
Central Elementary School (Traditional)	Beech Grove	2-3 478 students	C	50.4% vs. 60.5%	60.2% vs. 67.4%
Lillie Idella Kitley Elementary School (Traditional)	Franklin	PK-5 1,154 students	D	61.4% vs. 60.5%	68.2% vs. 67.4%
South Creek Elementary School (Traditional)	Franklin	KG-5 444 students	C	73.3% vs. 60.5%	78.2% vs. 67.4%
Southeast Neighborhood School of Excellence Charter (SENSE) (Charter)	Indianapolis	KG-8 540 students	D	38.8% vs. 60.5%	44.7% vs. 67.4%
Clinton Young Elementary School (Traditional)	Perry	PK-5 797 students	D	36.2% vs. 60.5%	49% vs. 67.4%
Thompson Crossing Elementary School (Traditional)	Franklin	KG-5 596 students	C	71.2% vs. 60.5%	78.5% vs. 67.4%
Indianapolis Lighthouse Charter School	Indianapolis	KG-12 902 students	C	49.9% vs. 60.5%	46.8% vs. 67.4%

AAI is dedicated to helping be a part of the solution regarding obesity in the community. Obesity is one of the most pressing health concerns for children. The Surgeon General recommends children should engage in 60 minutes of moderate activity most days of the week, yet estimates show that only 3.8 percent of elementary schools provide daily physical education (PE).<sup>1</sup> The obesity health crisis is affecting the

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<sup>1</sup> (Troost, 2009)

community and all of Indiana. Currently, Indiana has the fifteenth highest obesity rate in the country.<sup>2</sup> AAI will be unique because its vision is to have wellness as a focus; not just on the turf and court, but in all aspects of the students' lives. Healthy Body, partnered with a school-wide culture of wellness, will foster graduates who live healthy lifestyles and are engaged citizens in their community. Studies conducted all over the world have examined the link between physical activity and academic achievement. One study conducted in 2006 in the United States analyzed national data from almost 12,000 adolescents to investigate the relationship between physical activity and academic performance. The study found that adolescents who reported either participating in school-based physical activities such as PE or participating in sports were 20 percent more likely than their sedentary peers to earn an "A" in math or English.<sup>3</sup> This study demonstrates that physical literacy is directly tied to academic growth. AAI's aim is for an intentionally integrated program where students think about their academic, social, and wellness habits as part of their established day. Those interwoven elements of living a healthy life are understood by students and families choosing Athlos. Understanding physical, social-emotional, and academic literacies will produce students who are well-rounded.

Athlos Academies (ESP) has a network of fully implementing schools that AAI will work with and can learn from. Athlos Academies (ESP) network schools each serve student populations with diverse backgrounds. AAI welcomes the opportunity to serve students from different sub-populations locally such as the Chin population. Facing religious persecution in Burma, the Christian Chin, (a minority in Burma), ended up migrating to the United States and most arrived up in Indiana.<sup>4</sup> The Chin population is an integral part to the community. One of the communities AAI would enroll students from is Perry Township where the refugee population has increased by more than 18,000 percent in 12 years.<sup>5</sup>

AAI would welcome students of the Chin population and the Rohingya refugees who have increasingly begun to seek asylum in the United States. The Muslim Rohingya ethnic group of Myanmar are part of the largest group of refugees entering the nation today. The Rohingya are from the Rakhine state but are considered a stateless group and are now being persecuted and denied citizenship after the 1962 coup d'état.<sup>6</sup> After the coup d'état the Rohingya were forced into camps and their situation has become dire. According to Exodus Refugee, since 2012, 140,000 Rohingya were forced into refugee camps.<sup>7</sup> This has spurred Rohingya to migrate and seek asylum. Between October 1, 2015 and September 15, 2016, 11,902 Rohingya refugees have arrived in the United States. Since Indiana is home to one of the largest Burmese populations, an increasing number of Rohingya refugees are arriving in Indiana.<sup>8</sup>

One of Athlos' network schools, Athlos Academy of St. Cloud (AASC) in Minnesota, has a large refugee population like Perry Township in Southeast Marion County. In 2015, Minnesota welcomed more Somalis than any other state in the United States.<sup>9</sup> AASC's staff learned how to include the Somali culture into the school by hosting community nights with families. The community nights at AASC have created shared cultural learning experiences. The school has also hired staff that represent the different student populations to help families acclimate. By hiring a diverse staff to work at the school, AASC staff

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<sup>2</sup> (The State of Obesity in Indiana, n.d.)

<sup>3</sup> (Trost, 2009)

<sup>4</sup> (Hussein, From Burmese to American: Profiles in assimilation, 2017)

<sup>5</sup> (Perry Township Refugee Population)

<sup>6</sup> (Hussein, 2017)

<sup>7</sup> (A new wave of Burmese find refuge in Indiana)

<sup>8</sup> (Hussein, 2017)

<sup>9</sup> (Almond, 2017)



has learned how to best instruct and create relationships with Somali refugee students. AAI will have knowledge of how to serve the community through its partnership with Athlos Academies (ESP) and the school will include different subpopulations (including refugee populations) as part of its commitment to serving the community.

### Community Engagement

AAI's board wants to provide a unique model to families in the communities of Southeastern Marion County. The members of the founding board are committed to this area because the majority live and work there, know the challenges of the community, and want to meet its needs and improve outcomes for students. The board is committed to the Athlos mission and wants to provide the families in their community with a high-quality education option. To achieve the mission of serving the community, partnerships for AAI are imperative to the success of the school. School is more than learning the basics; it's about learning lifelong skills for a successful future, and working with others in the community to support that belief will positively contribute to the achievement and growth of AAI's students. Greater detail of the identified partnerships, process of identifying partners, and plan to continue pursuit of partnerships is explained in *Section II: School Design* in the *Community Resource* section. The AAI board has been building relationships with local elected officials, surrounding area superintendents, community members, support organizations, and beginning efforts on the school website's interest list and Facebook page. With a 2019 opening, the board is confident that holistic community support will be in place to support the program, the students, and the families being served.

### Education Plan/School Design

AAI's use of the three Pillars of Performance - Prepared Mind, Healthy Body, and Performance Character - will support the success of young people in our school. AAI will work with Athlos Academies (ESP) to use its best practices from its other fully implementing schools to assist with the startup and operation of the school. The overview in this section is described in greater depth throughout the body of the application.

#### *Prepared Mind*

The Prepared Mind pillar is an array of curricula chosen by educational experts that best fits the strategies and instructional practices for AAI. The pillar includes research-based academic curricula and instructional strategies designed by the Athlos Academies (ESP) staff to help Athlos students succeed. Teachers will support students and foster their growth to become self-motivated learners. The complementary relationship of the instructional methods will ensure students receive high-level instruction that can then be applied to all aspects of their life.

#### *Healthy Body*

The Healthy Body pillar is a scientifically designed program of age-appropriate movement lessons and is part of AAI's dedication to a school-wide culture of wellness. All students will have diverse opportunities to build athletic, nutritional, and wellness habits essential to living a healthy life. This pillar is designed to build confidence, long-term athleticism and wellness habits, and a sense of team, while physically activating the brain in ways that research proves will lead to greater academic achievement. The science behind this pillar is further explained in the body of the application.

#### *Performance Character*

The Performance Character pillar was inspired by research from Angela Duckworth, Paul Tough, Carol Dweck, and Martin Seligman to be the basis and foundation to school culture at AAI. The program

promotes 12 traits that are vital to success in college, career, and life. The 12 Performance Character traits are described in greater detail in the body of the application. Promoting these traits will help students embrace both success and failure by developing the humility to learn from their mistakes and the courage to take risks. The traits were chosen because they will help students be more successful with intellectual talent or educational attainment as they build a person's social and emotional capacity to develop strong, healthy relationships and persevere through challenges.

The Performance Character traits were designed to be implemented in all aspects of schooling. Every morning students will participate in morning huddles focused on traits and teachers will incorporate the traits into lesson plans to cultivate students' social-emotional learning skills. Students are exposed to intentional Performance Character experiences built into the Healthy Body athletic curriculum. The Performance Character pillar recognizes the deep connection between certain character traits and success. At Athlos schools the development of Performance Character is integrated into every learning opportunity, allowing students to experience this connection first hand. Traits like grit, curiosity, social intelligence, and integrity become a lens through which students view their learning as about more than grades, but as learning for life.

### Governance and Leadership

A strong governing board for a charter school consists of a diverse group of community leaders who are:

1. Committed to the mission and vision of the school and the success of the students and families being served.
2. Committed to a growth mindset to govern the school in a way that is fruitful for the development of AAI to fit the needs of the community and continue to grow the academic and social elements of the community through the school model's impact.
3. Committed to maintaining a governing board of 5-7 members with diverse skillsets in the areas of governance/ethics, community relations, finance, business/start-up, education, and legal.

AAI's partnership with Athlos Academies (ESP) is a critical component of school success. Although leadership for AAI for a 2019 opening has not yet been chosen, there is a clear plan driving the selection of the school leader and leadership team. The chosen leadership team will have not only a strong history of student achievement, but also a compelling interest in developing the three pillar model at AAI. The plan will lead to finding a school leader who embodies the Athlos model and understands the needs of the community being served.

The current founding board is described more thoroughly in *Section I: Evidence of Capacity*. The organizational chart for AAI can be seen in Attachment 14 of this application. The school's organizational charter shows the relationship between the authorizer, governing board, school leadership, and the ESP. Attachment 14 shows that the governing board is accountable to the authorizer through their work governing the school and ESP. The school leader and the ESP have a clear reporting structure to the governing board for the life of the school. To support the three pillar model, the ESP and school leader are also beholden to each other to support the development and success of the school through implementation of the model and management of the day-to-day operations. This structure is a delicate balance that allows the leadership and ESP to support management of the school and the board to govern the needs/outcomes of the school.

## Section I: Evidence of Capacity

### Applicant Group

The members of the governing board (shown below) have been the most pivotal piece to bring this application and charter to life. Their dedication and grit is unparalleled.

The board chair, Ashley Gibson, is currently the director of policy with The College Board. She holds her J.D. from Indiana University's McKinney School of Law and holds a degree in Public Relations. She has worked in educational policy with legislative teams for Mike Pence, Tony Bennett, and Mitch Daniels. She is a go-getter who has significantly contributed both professionally, and personally, to the most pivotal eras of education reform initiatives in Indiana. Ashley is a connector, a doer, a strategist, an innovator, and a strong leader for the governing board.

The vice chair, Elsie Owolo, is currently the policy manager for Indiana with Teach Plus. Elsie is a strong leader and brings a strong educator voice to the board. Elsie has her Master's in Public Administration and a degree in Legal Professions and Studies. Her work in education has taken her through teaching experience, policy and reform work in D.C., a diverse set of experiences as a practitioner and policy person in Texas, and has worked extensively with charters in California. She is passionate about what is best for children everywhere and will do everything it takes to provide them the best educational opportunities. Her commitment to the Athlos model, her passion for social justice and equitable education opportunities for all, and her rich understanding of putting theory into practice, brings great strength to the board in a leadership role.

The board treasurer, Chad Timmerman, is currently the vice president of Ascend Indiana. He spends his professional day connecting, developing, and implementing partnerships that create educational opportunities and workforce solutions. He is passionate about Athlos because it supports a well-rounded student to be a healthy, high-performing citizen of their community. Chad has his J.D. from Indiana University's McKinney School of Law, a bachelor in arts in Political Science and History, and an M.P.A. focusing on public policy, political science, public finance, and economic development. Chad has worked with the Indiana House of Representatives, the Indiana State Budget Agency, and served as the Director of Education Policy for the Governor's Office. His passion and experience in school finance and economic development make him an amazing asset to the AAI board.

The board secretary, Dr. Julie Schmalz, is currently an anesthesiologist at Community South in Greenwood. She has a reputation for being a lifelong learner and is currently enrolled in her MBA program to pursue work in a private practice focused on integrative medicine. She has her M.D. and has furthered her medical profession by completing a degree in Integrative Health from Arizona State University. This program is her passion to bring a more holistic approach to informative and preventative healthcare, especially in the community where the school is proposed to locate. Her belief in the Athlos model stems from her passion for supporting community members to learn and advocate for their own health and wellness. She sees Athlos as a solution for both the physical and social-emotional components of this approach to self-care.

Board member, Steve Sorrel, is an excellent strength with his entrepreneurial and finance skills. Steve has worked for large corporate firms, has pursued his own successful start-ups, and is currently running Cherry Tree Dental, LLC. He is a passionate individual with a mind for strategy and innovation. He is a


















true problem-solver and community engager who will provide the school with incredible support during launch and with long-term innovative needs as issues arise during the life of the school.

Charlie Schlegel, education consultant, has assisted the board through the application process and is a strong believer in the Athlos model. Charlie has gotten to know staff at the ESP personally over several months and has chosen to support the AAI board in their pursuit for a charter. Charlie is a connector, a strong voice in education practice and operations, and has helped the board to continue their relationship building in the area proposed to be served. Charlie is an asset to this process and the board is very grateful for his service to bring AAI to life.







Applicant Group Resumes: see Attachment 1.

## Governing Board

Board Member Information Forms: see Attachment 2.

Board Member	Current Job	Board Skills Sets	Role on the Board
Ashley Gibson	<i>Director of Global Policy and External Relations, The College Board</i>	   	Chair
Elsie Owolo	<i>Policy Manager, Teach Plus</i>	  	Vice Chair
Dr. Julie Schmalz	<i>Anesthesiologist, Community South (Greenwood)</i>	 	Secretary
Chad Timmerman	<i>Vice President, Ascend Indiana</i>	    	Treasurer
Steve Sorrel	<i>Founder, Cherry Tree Dental, LLC</i>	  	Member

KEY						
	Education/ Administration	Finance	Governance/ Ethics	Business/ Start-up	Legal Experience	Community Engagement

The board will consist of 5-7 core members with a board capacity of up to 13 members. The governing board’s primary responsibility is to provide effective governance and oversight to the school, and to hold the school accountable to the promises outlined in the charter in compliance with state law and the authorizer. The core roles of the board’s governance will be to oversee financials, ensure compliance, oversee leadership and organizational health, monitor academic success, and make governing decisions that support the mission and vision of the school. Both the school leader and ESP report directly to the governing board during regularly scheduled board meetings.

The board may also have advisory members or parent advisory members as the needs of AAI develop. One advisory group to be formed is the wellness committee. This group will advise the health and wellness program at the school including the food being served, programs being implemented to support wellness initiatives, and any related initiatives to the Healthy Body pillar or National School Lunch Program requirements. This group will consist of the lead athletic coach, a member of school leadership, the board chair, and parents. Another advisory group will be the recruitment team who will work with the community relations committee to manage and implement all recruitment efforts in coordination with the ESP's school operations team, specifically the student recruitment coordinator.

The board has committees in the following areas: finance, academics, facilities, and community relations committee. The finance committee's mission is to govern the financial health of the organization and the decisions being made therein. The academic committee's mission is to monitor student academic progress and assessment data; their role is not to prescribe curricula or instructional strategies, but to work with leadership and the ESP to review, monitor, and update the board on any applicable compliance issues. The facility committee's mission is to review and govern each step of the facility project through initial construction and into the life of the school. This work includes, but is not limited to, working with the Athlos construction manager, reviewing site plan/floor plan/timeline of decisions, reviewing furniture/colors/delivery timelines, reviewing the technology infrastructure plan with Athlos construction manager, and monitoring inspection reviews. The mission of the community relations committee is to oversee the impact and implementation of community partnerships, to continue outreach for the school, to review and monitor plans for continued community engagement, and to review and monitor progress for all recruitment efforts for the school.

## Procedures

AAI's board has regularly scheduled board meetings at least monthly. The start-up and founding board commitment is more intensive to build relationships and partnerships to support the school upon approval and launch. The board has, and will continue to, receive training from the ESP about their program model, implementation practices, assessment practices, and network learning to support the board's ability to govern the model well. The board will also receive more extensive governance training from *Board on Track* as both a start-up board and continuously as a governing board after launch. Continued training with the ESP is also a priority for the board during the annual Summer Institute at Athlos Academies (ESP) headquarters with other network boards, leadership, and staff. There will be an annual board evaluation that includes both self-reflective evaluation, school leadership evaluation, and ESP services evaluation. This process is meant to identify needs of the board as they plan for the next year. All policies will be developed and voted upon during the zero year, and will continue to be refined (with any changes voted upon by the board) as needed during the life of the school. The board's annual calendar will delineate priorities for each monthly board meeting. Each meeting, and associated agendas and minutes, will be posted on the school's website and in a public location in accordance with law. Sample agendas, governance calendars, and committee calendars can be seen in *Attachment 3*.

## Grievance Process

Athlos Academy of Indiana (AAI) recognizes the rights of parents and students, as well as staff and community members, to file a formal grievance in cases where traditional methods of communication have failed to resolve an issue. Grievances should first be expressed at the local level through direct communication between the complainant and the person most capable of resolving the issue (a teacher, staff member, or administrator). If an issue is not satisfactorily resolved through direct communication,

the issue may be elevated to the attention of school administration by scheduling a meeting with the school leader or designee through the front office.

If a resolution cannot be reached between the complainant and the school leader, the complainant may file a formal grievance, using a form provided by the school. Grievance forms should be submitted to the school's office within 30 days from the incident that resulted in the grievance. The school leader should readdress the situation and send a written decision to the complainant within five working days. If the complainant is not satisfied with the administrative decision, he or she may appeal to the board. A written decision should be sent back to the complainant within 45 working days following submission of the grievance. Issues escalated to the AAI board shall be addressed in compliance with Indiana open meeting laws. All grievances must include a written record of all communications and administrative meetings.

### Pre-opening Development

AAI anticipates receiving a line of credit from Athlos Academies (ESP) as part of its year zero operations. The line of credit will go toward supporting the year zero operations and ensuring the school can open and be successful beginning day one. Year zero operations include an allocation for general operating expenses, including staff development and marketing efforts associated with staff and student recruitment, special education services, general office supplies and technology needs, lease space, and contracted services associated with annual audit and legal services.

Upon receiving ICSB authorization, Athlos Academies' school operations team will work to plan for, and execute, a successful launch. The real estate development team will manage obtaining and building a school facility. In conjunction with the ESP staff, the school leader will be contracted with for full-time employment (depending on the individual's personal situation, including his or her current job contract or commitment) to work with the ESP and local governing board. The school leader will be paid through a line of credit established between the ESP and the governing board to provide start-up funding for AAI.

### School Leader Responsibilities and Selection

A school leader has not yet been chosen. The school leader will be responsible for staff management, training, motivation, program implementation, and legal and fiscal compliance at AAI. The job description for the school leader can be seen in *Attachment 3*.

Recruiting and hiring a skilled and experienced school leader is priority for AAI. The school will use a multi-step process that includes marketing events to help prospective candidates initially understand and be inspired by the Athlos model. This recruitment process is done by the ESP's partnered national talent search firm to identify strong candidates for AAI. The search firm filters candidates to the ESP to consider for a first round of interviews. Upon application for the position, an initial review is used to evaluate whether a candidate meets basic requirements. Those who pass this stage will be given a structured interview with several Athlos Academies (ESP) staff members. Top scorers after the structured interview then participate in a panel interview helping to identify the best fit(s). The top candidates, narrowed down to three to five individuals, are presented to the board for consideration. AAI has a staff recruitment and retention plan that further outlines this process and contains sample interview structures and questions for each phase described above.

Upon hiring, the school leader will participate in an intensive on-boarding process that includes a scripted series of blended on-site and virtual trainings. The virtual component of these trainings will be done using the learning management system (LMS), Canvas. AAI's school leader will also take part in two three-day workshops prior to the school opening that build upon and expand Athlos learning to support the content of the LMS trainings. School leaders are supported along the way in preparing to open the school, both by launch specialists and content experts who help ensure the school is successful right away. Athlos Academies (ESP) staff members are the primary support for this on-boarding process, while also utilizing appropriate partnerships and professional opportunities locally to ensure fidelity and alignment to standards and statewide requirements. The school leader will be hired for full-time employment no later than the January prior to opening. For example, if the charter application is approved for a 2019 opening, a school leader may be hired anytime between approval and January of 2019.

### Education Service Provider (ESP)

ESP Information: see Attachment 3.

Governance and Operational Structure: see Attachment 4.

## Section II: School Design

### Innovation

AAI will adopt the Athlos three Pillars of Performance: Prepared Mind, Performance Character, and Healthy Body. The school will focus on educating the whole child through its holistic approach. Healthy Body was created in the face of a nationwide crisis - the rising rates of childhood obesity. Healthy Body curriculum adheres to a long-term athletic development (LTAD) approach. This evidence-based approach takes into account key developmental windows for students and is based in science and research. The Healthy Body pillar is intentionally woven into the other two pillars, and into the overall school cultural expectations, to uphold the Athlos commitment to a culture of wellness.

Prepared Mind is an innovative approach to academics and measurement of holistic growth and development of students and staff. The Prepared Mind pillar is a compilation of curricula chosen following extensive research and is inclusive of best practices, instruction is active, student-centered, and inquiry-based. AAI will foster a culture of learning by creating an environment where students are engaged, curious, and excited to learn as they track their progress and self-assess in a standards-based learning environment. At AAI, instruction is driven by student curiosity, and students are engaged in their learning through the process of reflection and revision.

The Performance Character pillar recognizes the deep connection between certain character traits and success. AAI will integrate the development of Performance Character into every learning opportunity, allowing students to experience this connection first hand.

In the *Curriculum and Instructional Design section*, Athlos's three pillar model will be explained in great depth.

To implement the Athlos model, the school will need a high-quality facility to create a positive school culture and quality physical learning environment for students. The AAI facility was intentionally designed to support seamless implementation of the three pillar model. AAI's brand-new facility will have the space and equipment, including indoor turf and court, to ensure proper implementation of the

Healthy Body pillar. It is also designed to promote the Performance Character and Prepared Mind pillars, as well as the school-wide strategies and culture, by providing state of the art classrooms with flexible uses. AAI believes the Athlos model and its innovative facility will be a powerful resource in earning the trust of the communities on the southside of Indianapolis.

### Curriculum and Instructional Design

The educational model at AAI is built on three foundational, interwoven pillars that lead to educational excellence: Prepared Mind, Healthy Body, and Performance Character. Believing that intelligence, athleticism, and character are malleable, a growth mindset is integral to the design. Prepared Mind, Healthy Body, and Performance Character all depend on each other to help students reach their maximum potential and build strong schools and communities. Athlos Academies (ESP) has created a pillar implementation guide document which explains the 36 different strategies and the school-wide structures in depth. AAI faculty will receive professional development based on the strategies and through innovative virtual and onsite professional development.

AAI will be a K-8 school at full capacity. Class sizes will be determined by enrollment but AAI has planned for approximately 24 students in each class. The classes will be taught by high-quality teachers who embody the Athlos model. After approval, AAI will work with Athlos Academies (ESP) to recruit teachers who are ideal for the school and the model. Recruitment efforts will include attending local teacher hiring fairs, posting on the school's website, and at local universities. In addition, positions will be posted on national teaching websites and recruiting events. The school will screen for teachers who have an instructional philosophy aligned with the Athlos model, demonstrate the 12 Performance Character traits, and exhibit a growth mindset. By using these recruitment efforts and identifying what the ideal candidate is, AAI will have staff that are high-quality.

### School-Wide Structures

Athlos schools have school-wide structures in place that represent key components of the model that occur across all three pillars and support excellence. Full implementation of these structures is evidenced by positive school culture, high expectations for both staff and students, clear communication with the community, and progressive implementation of the pillars. The Athlos school-wide structures are:

- Positive school culture
- Family and community involvement
- Health and wellness integration
- Student support systems
- Teacher professionalism
- Standards-based grading
- Student-led conferences
- Effective leadership
- Data-driven decisions

### Prepared Mind Pillar

AAI will align curriculum and instruction with the Indiana Academic Standards for English Language Arts, Mathematics, Science and Social Studies. Alignment to the standards will support development of content knowledge and the curricula will either drive or supplement instruction and allow for consistent, standards-based assessment. The school leadership team, instructional coaches, and teachers will work together to develop curriculum maps that identify specific content, supporting materials, and cross-curricular integration. The Prepared Mind also focuses on backwards-design for unit-planning, effective



lesson plans, and inquiry-based learning experiences. Costs for curricular resources and professional development are accounted for in the operational budget.

AAI's criteria for all endorsed curricula include the following:

- The program is in alignment with Indiana Academic Standards.
- The program maintains quality vertical and horizontal alignment.
- The program is structured yet allows for significant differentiation.
- The program encourages multiple teaching modalities.
- The program offers interdisciplinary opportunities and contextual learning.
- The program encourages relevant, real-world application of knowledge and skills.
- The program promotes skills to critically analyze and synthesize information.
- The program offers professional development materials or opportunities for teachers.
- The program will have formative and summative assessments of student learning.

The following curricula has been selected to be resources to facilitate teaching and learning at AAI. The implementation of the curricula chosen will be supported by professional development by Athlos Academies (ESP) staff and a learning management system (LMS). The curricula were selected following deliberate research, and will best support student growth and achievement.

#### *Literacy*

AAI will follow a balanced literacy framework to foster literacy development in all areas. This includes instructional time for reading/writing workshops, independent reading, small group reading, shared/close reading, and word study. All instructional time supports literacy processes, including comprehension of informational text and literature, phonemic awareness, phonics, fluency, and vocabulary development. Recognizing the need to support many strategies and processes, Athlos Academies (ESP) staff identified four core programs for the overall framework.

#### *Units of Study for Teaching Writing*

This curriculum provides K-5 grade-specific support for teaching writing workshops that will help students meet and exceed Indiana Academic Standards. There are four units of study per grade level that are organized around the three types of writing. Each unit contains 18 to 22 lessons, including all the teaching points, mini-lessons, student conference guidelines, and small-group activities required to teach writing comprehensively in a writer's workshop style. Suggestions for how to use conferring and small group instruction to support and respond to students' needs are included in each session. This curriculum includes meaningful professional development opportunities, teacher instructional resources, and digital student support materials. It also includes a set of valid, reliable performance assessments and a scope and sequence of learning progressions across opinion, information, and narrative writing that include benchmark student texts, writing checklists, and assessment rubrics.

#### *Units of Study for Teaching Reading*

This curriculum offers resources for teachers to implement rigorous and responsive reading workshops to cultivate a joy for reading. Teachers will use these units of study or similarly designed units as the core of the K-5 reading curriculum. The carefully organized spiral curriculum and sequential units of study provide K-5 support for teaching students how to read informational text and literature with sophistication and engagement. Each unit's books provide a comprehensive roadmap for teaching a reading workshop and help teachers plan goals, mini-lessons, independent reading time, share sessions, and assessments for that unit. Suggestions for how to use conferring and small group instruction to

support and respond to students' needs are included in each session. As with Units of Study for Teaching Writing, teachers will be provided additional resources for implementation.

#### *EL Education K-2 Reading Foundations Skills Block*

The K-2 foundational skills block uses a structured phonics approach grounded in the Phase Theory of reading development of Dr. Linnea Ehri. The K-2 Reading Foundations Skills Block is divided into four modules that span a school year. Each lesson in the Skills Block is divided into two chunks starting with whole group instruction followed by differentiated small group instruction focusing on print concepts, phonemic awareness, phonics, and fluency.

#### *EngageNY ELA Curriculum Modules (6-8)*

EngageNY ELA Curriculum is a free, open-source series of teaching modules developed and managed by the New York State Department of Education to support its implementation of Common Core State Standards. These modules were developed by EL Education formerly known as Expeditionary Learning, an organization supporting high performing schools for more than 15 years.

These modules will serve as full curriculum for emerging teachers and as curriculum structural guides for advanced educators. This curriculum was chosen to ensure that high-quality curriculum design is incorporated into the learning experience of students during the school's first years of operation, and that teachers have the opportunity to experience teaching such units. The curriculum includes four modules for each grade level from 6th to 8th grade. These modules focus on reading, writing, listening, and speaking in response to complex texts. The AAI leadership team and ESP work with teachers before the start of the school year to review how the modules align with the Indiana Academic Standards for English language arts prior to the start of the school year. If gaps between the modules and state standards are found, modifications and supplementary units and lessons will be made before the start of the school year.

#### *Words Their Way*

This classroom-proven framework for teaching spelling provides detailed directions for teachers working with students in each stage of spelling development, including additional instruction in phonics and vocabulary. The program is certified as a valid instructional intervention tool by the National Center on Intensive Intervention Research at the American Institute for Research. A set of books will be purchased as shared resources for each learning community in the school, including the K-2, 3-5, and 6-8 communities.

#### *Mathematics*

##### *Bridges in Mathematics (K-5)*

The Math Learning Center, a non-profit organization, designed Bridges in Mathematics to help students become confident mathematical thinkers and motivated learners with the ability to explore new ideas and effectively articulate their insights and questions. The curriculum focuses on developing students' deep understandings of mathematical concepts, proficiency with key skills, and ability to solve complex and novel problems. Bridges blends a variety of teaching methods, including direct instruction, structured investigation, and open exploration. Teachers will be encouraged to incorporate Bridges into the K-5 classroom in conjunction with a skills-based partner program called Number Corner, also designed by The Math Learning Center. Number Corner is a skill-building program that emphasizes practice in the context of broader mathematical concepts. It uses short daily exercises to introduce, reinforce, and extend skills and concepts.

### *College Preparatory Mathematics (6-8)*

College Preparatory Mathematics (CPM), is a program designed by a California non-profit organization. It offers a complete mathematics program, including problem-based instructional materials and ongoing professional development for teachers, designed to engage all students in learning mathematics through problem solving, reasoning, and communication. Teaching strategies rely on recommendations of the National Council of Teachers of Mathematics. CPM's curriculum will be aligned to the Indiana Academic Standards and weaves the Standards for Mathematical Practices into the fabric of daily lessons.

### *Developing Mathematical Thinking Institute (DMTI)*

AAI will engage with DMTI to provide teachers with significant professional development workshops and resources. DMTI is led by Dr. Jonathan Brendefur, a mathematical education professor at Boise State University. The framework for this professional development comprises five critical features: taking students' ideas seriously, pressing students conceptually, encouraging multiple strategies and representations, addressing misconceptions, and focusing on the structure of mathematics. Athlos Academies (ESP) staff chose resources that best match Indiana Academic Standards and current trends in mathematics education. However, at their discretion, teachers may supplement instruction with other materials with the end goal of student achievement.

### *Science*

The science program at AAI will follow the three-dimensional framework for K-12 science education (science and engineering practices, disciplinary core ideas, and crosscutting concepts)<sup>10</sup> laid out in the Next Generation Science Standards (NGSS) and the Indiana Academic Standards for Science. Every year in grades K-5, students will have one life science, one earth and space science, and one physical science unit. In middle school, students will have two integrated science units per year. AAI's teacher plan includes time to work with content standards: to learn what the standards are; to deconstruct each standard into knowledge, skill, and reasoning learning targets; and to design lessons and units that will help students meet those learning targets.

Resources to teach lessons and units have been researched by staff at Athlos Academies (ESP) and made available for teachers in its learning management system (LMS). These include resources published by the National Science Teachers Association, National Geographic, NASA, or other scientific organizations; resources written and published by science teachers in other NGSS states; and science teaching kits, such as FOSS modules and Engineering is Elementary.

Foundational to the science program is integrating Performance Character traits through explicit and implicit instruction. Active teaching strategies such as protocols, labs, simulations, and projects will be used to support diverse learners. Ongoing professional development with teachers will help them find new ways to intentionally build movement, health, and Performance Character into science lessons.

AAI's three-year plan includes professional development for teachers in *Understanding by Design*, a framework published by Wiggins and McTighe.<sup>11</sup> By utilizing this framework along with other pillar strategies, teachers will begin to work collaboratively, with support from an on-site instructional coach

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<sup>10</sup> (National Research Council, 2012)

<sup>11</sup> (McTighe & Wiggins, 2000)

and Athlos Academies (ESP) staff, to design high-quality, interdisciplinary units with connections to local issues, Indiana environments, and the Healthy Body pillar.

### *Social Studies*

The social studies program at AAI will be centered on five social studies domains:

- Culture and Community
- Citizenship and Government
- Financial Literacy and Economics
- Geography
- History

These domains are based on the National Curriculum Standards for Social Studies and the principle that students need a strong foundation in these five domains to be engaged and informed citizens of a diverse, global society.<sup>12</sup> Athlos Academies (ESP) staff have researched curricular materials to teach social studies lessons and units, and teachers will access those materials through the learning management system (LMS). Because these resources support Athlos schools in several states, they are arranged by grade-level band (K-2, 3-5, 6-8) within each domain to allow teachers to modify specific content to make local connections and to meet the Indiana Academic Standards. Athlos Academies (ESP) staff will work with instructional coaches and teachers at AAI to find, create, and/or modify resources specific to Indiana’s culture, history, geography, economics, and government.

### *Athlos Roots*

AAI students will participate in Athlos Roots at every grade level through huddles, special projects, and connections to social studies and language arts that explore topics of self, family, community, history, and culture. Students document their experiences in student portfolios and share the culmination of what they have discovered through Performance Character presentations that take place during students’ promotion from elementary to middle school and from middle to high school.

### *Supplementary Resources*

Additional resources will be made available to teachers to assist with facilitating teaching and learning. These programs provide high-quality differentiation resources that teachers can utilize as needed. AAI school leadership team will decide the supplementary resources based on the student population of the school.

### *Differentiation*

One key to helping each student reach academic success is ensuring teachers can differentiate or adapt curriculum and instructional materials as needed. This is especially true for certain populations of students, such as those with Individualized Education Plans (IEP) or English Language Learners (ELL). Special education teachers and ELL staff are essential in the process of identifying those student needs and addressing them through material adaptation. Athlos Academy of Indiana will focus on these needs by:

- 1) identifying student’s individual goals and objectives in general education activities,
- 2) ensuring a specific performance expectation in that general education setting,

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<sup>12</sup> (Studies, 2010)

- 3) determining what content to teach as a team,
- 4) and determining how to then teach that content without modifications if the student can receive the same outcomes.

If a student cannot receive those outcomes within non-modified teaching strategies, alternative adaptations are reviewed, such as instructional arrangement, lesson format, student-specific teaching strategies, selecting alternate curricular goals, adapting the physical and social classroom environment, modifying the materials, or supervision arrangements. The team supporting these students will work together to measure and continuously evaluate the effectiveness of the adaptations.

#### Healthy Body Pillar

In addition to the academic development of students, AAI is committed to helping them develop healthy bodies. The Healthy Body pillar consists of three main components - physical education and activity, health and nutrition, and impact on school-wide culture of wellness. Each of these three elements is composed of specific curricula, events, and programs.

#### *Physical Education and Activity*

This includes the Athlos athletic curriculum (AAC), classroom movement breaks, and unstructured free play.

#### *Athlos athletic curriculum*

The AAC was professionally developed by exercise science specialists and is taught by individuals with an expertise in exercise science, human movement, and youth training strategies. It provides 736 age-appropriate structured lesson plans for grades K-8, aligned to meet state physical education requirements, as well as provides ongoing training and mentorship for teachers and coaches. The program requires that all students receive four 45-minute athletic movement sessions each week to help them develop into active, fit, and efficient movers-the Athlos definition of an athlete. The AAC was designed with Piaget's theory of cognitive development, and as well as Erikson's theory of psychosocial development in mind and is broken into five grade-level groups (K-1, 2-3, 4-5, 6-8, and 9-12) that maximize the developmental supports of each age group.

In addition to the cognitive and psychosocial design of the Healthy Body pillar, it also focuses on the physical domain in its adherence to the long-term athletic development (LTAD) approach. An LTAD approach is designed to develop movement vocabulary, physical literacy, and movement skills for improved athleticism in children between the ages of 3-14.<sup>13</sup> The Healthy Body pillar embodies the following definition of athleticism in its implementation of an LTAD program: "Athleticism is the result of athletic movement skills development that involves learning proper technique for agility, balance, coordination, flexibility, metabolic training, power, reaction time, speed, strength, and strength endurance."<sup>14</sup> The AAC was designed with theories on the cognitive, psychosocial, and physical domains for educating children to become efficient movers.

The AAC ensures that all students progress efficiently and safely toward their personal-best levels of physical performance year-over-year. By design, the program can be easily differentiated to meet the needs of all students, including those working at an accelerated pace and those with special needs. The

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<sup>13</sup> (Meadors, n.d.)

<sup>14</sup> (Meadors, n.d.)

overall program design is based on research that supports the connections between physical fitness and academic performance.

The AAC is ultimately designed to do the following: 1) Provide activities for students that address fundamental coordinative and physiological developmental windows to accomplish appropriate physical activities and challenges. 2) Keep students engaged by providing challenges that are within the scope of their physical and cognitive abilities. 3) Provide an approach of long-term athletic development that focuses not only on in-class participation, but provides a framework of fundamental movement and sports skills that will give each student opportunities to engage in physical activity throughout his or her entire life. The AAC is based on progressions of fundamental movements, teaching new skills and activities that are appropriate for each grade-level grouping.

- **Grades K-1: Movement Fundamentals** build physical literacy and lay the foundation for becoming active, fit, efficient movers. Students develop proper movement patterns necessary for all types of physical activity through building body control skills such as coordination and transitions, body awareness skills such as proprioception and stability, traveling skills such as fundamental plyometric and rhythmic movements, and interpretation skills such as moving over and around objects.
- **Grades 2-3: Sports Skills Fundamentals** build on the Movement Fundamentals with immersion in basic sports skills. These skills include throwing and catching skills such as throwing underhand and overhand, dodging and chasing skills such as jumping and mirroring, dribbling skills such as hand dribbling and volleying, and kicking and striking skills such as passing with the foot. Students are exposed to a variety of basic skills that cut across multiple sports, which lays a foundation for a healthy and active lifestyle.
- **Grades 4-5: Introduction to Movement Through Sport** presents students with movement challenges aligned with different team sports. Students apply the newly learned movement and sport skill competencies. This is a student's first opportunity within the AAC to compete in a structured team sport setting. These lessons not only apply the movement and sports skill fundamentals learned prior, but continue to be a great opportunity for students to model Performance Character in their daily pursuit of athleticism.
- **Grades 6-8: Organized Sport Application** introduces performance enhancement through the development of speed, agility, mobility, and strength. Students develop key physiological adaptations and participate in an environment that instills a joy of physical activity with exposure to various sports. Students build speed, develop coordination and agility, strengthen mobility and stability, and enhance fitness through aerobic and anaerobic exercises and resistance training.

#### *Athlos Athletic Assessments*

The assessment program for the AAC includes fitness assessments and athleticism assessments. The purpose of these assessments is to measure student growth as they progress through the AAC. It also provides students with agency and information as they track their own athletic development over time. Physical literacy assessments are modeled after the standards set forth by the Society of Health and Physical Educators of America (SHAPE America).<sup>15</sup> Following standards-based grading, rubrics from SHAPE America are modified to a "4, 3, 2, 1" scale. The rubrics are developed using national standards based on developmentally appropriate skills measured quarterly. Each quarter the assessments will be

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<sup>15</sup> (SHAPE America, 2010)

built upon the needs of each student in their progression for Healthy Body goals. The determination of assessment goals being met is based on the growth of each individual student to meet the standards set forth by SHAPE America for each developmentally appropriate stage of fitness. Athlos Academies (ESP) staff has designed movement rubrics that are focused on what is taught in the curriculum. The rubrics created are aligned with the lesson plans.

The AAC is designed to collect and analyze physical literacy data through summative assessment tied to fundamental movement/sport skill rubrics. Athletic performance coaches will assess data and set instructional goals to meet proficiency year-over-year. Physical literacy progress for students will be tied to the movement rubrics associated with the standards set forth by SHAPE America and Athlos Academies (ESP).

#### *Classroom Movement Breaks*

AAI will support a school-wide culture of wellness by implementing classroom movement breaks to emphasize that wellness is not just confined to the turf and the lunchroom but beyond to all areas of life. Movement breaks are brief intervals that encourage students to get up from their seats and move around. Teachers will intentionally incorporate these moments into their lessons to engage students physically and mentally. These short brain-based movement breaks become classroom practice and, when used effectively, add to the instructional practices of the teacher and the learning experience of the student. Furthermore, research suggests that students who are more active are better able to obtain and retain what is being learned in the classroom. Intentional practice of the mind body connections and movement throughout the day will foster growth through academic, physical, and social-emotional development.

#### *Free Play and Unstructured Physical Activity*

While structured physical activity time supports the development of gross motor skills, object control skills, and self-confidence, free play is also essential to student growth. Since the 1970s, students have lost 12 hours of free time per week, with a 50 percent decrease in unstructured outdoor activities.<sup>16</sup> Nearly one-third of children and adolescents in the United States are overweight or obese.<sup>17</sup> In addition to the structured opportunities in the AAC, students will have the opportunity to participate in three 15-minute unstructured free play breaks in the first year of operations, increasing to four free play breaks in year two. In addition to the physical benefits of movement, these unstructured free play breaks are important in the social and cognitive development of children. Free play allows children to “increase their imagination and creativity, organize their own games, develop their own rules, learn problem-solving skills, and practice leadership.”<sup>18</sup> These unstructured moments are also an opportunity for students to practice the movement and physical skills they are building through the AAC.

#### *Health and Nutrition*

The emphasis on health and nutrition is put into practice with the regular curriculum standards, a healthy approach to school meals, and service learning opportunities that address community needs.

- Subject Integration: Health and nutrition content will be interwoven into classroom instruction where natural connections exist, particularly in the science curriculum. Teachers will integrate grade-level nutrition topics into one or more core subject units each year.

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<sup>16</sup> (Juster, Hiromi, & Stafford, 2004)

<sup>17</sup> (Foundation, 2014)

<sup>18</sup> (Barros, Silver, & Stein, 2009)

- **School Meal Program:** The school meal program will consist of nutritious food, reflecting the Healthy Body focus of the school. The program will highlight nutrition and health concepts students are learning in their science class, as well as civic responsibilities around resource and waste management taught in social studies. As part of AAI's focus on a culture of wellness, the school will pursue enrollment in the National School Lunch Program, where meals will adhere to the nutritional guidelines set by the United States Department of Agriculture (USDA).
- **Locally Driven Service Learning:** AAI will have a wellness committee that will work with school leadership during yearly planning to identify areas of needs and opportunities in their community for wellness related service learning. Through this practice, students will be given the experience to practice their civic leadership through projects related to health, nutrition, and overall wellness.

*Culture of Wellness*

Wellness at AAI will be a school-wide active process of becoming aware of and making positive choices toward a healthy and fulfilling life. Our school will create a culture that embraces this ideal. Culture of wellness at AAI is supported by the design of the Athlos Academies (ESP) “ready to learn, ready to move” uniforms (fabricated out of wicking material to accommodate the transition from athletic movement class to the classroom), core subject integration, culminating campus events, increased daily physical activity, and a conscious campus effort to emphasize healthy lifestyle choices. AAI will foster and grow a culture that places a spotlight on what it means to live a healthy lifestyle.

- **Family and Community Events:** AAI will host events for families, students, and the community that will support the implementation of the Athlos three pillar model. These events will be coordinated and planned by staff and students to showcase learning and highlight various aspects of the Athlos school-wide culture of wellness and how the school embodies the three pillars. Pillar nights/open houses provide opportunities for families and community members to see the school, see the implementation of three pillars, and ask questions to go more in-depth in learning about the Athlos model.
- **Staff Fitness Program:** To support an inclusive culture of wellness, staff and faculty will be encouraged to model the Athlos definition of an athlete—an active, fit, and efficient mover—for the students by participating in staff fitness and wellness programs.

*Performance Character Pillar*

AAI plans to use the Performance Character program developed by Athlos Academies (ESP), which will be the foundation of the school’s culture and will help students feel more connected to their peers, teachers, and the school community. This program focuses on the purposeful development of 12 traits: grit, leadership, social intelligence, focus/self-control, optimism, curiosity, energy/zest, courage, initiative, humility, integrity, and creativity. Based on experience in other Athlos schools, the Performance Character traits will help students succeed not only in school but in their future professional lives where social skills and character can be important differentiators. These traits will prepare students to be high-performers who others want to work with and emulate in their future professions. All 12 traits (shown below) are taught and integrated into instruction on the turf and in the classroom.

PERFORMANCE CHARACTER TRAITS		
Grit	Leadership	Social Intelligence
Focus / Self-Control	Optimism	Curiosity
Energy / Zest	Courage	Initiative
Humility	Integrity	Creativity



The Performance Character program is built on four key components:

- Curriculum: which includes both the integration of character traits into other academic subjects as well as direct instruction during quarterly trait kickoffs (events that engage the entire school in understanding the traits) and morning huddles (daily classroom meetings where students engage in a character-building activity with their classmates and teacher);
- Instruction: which includes teachers and Performance Character coaches using instructional strategies that build character, providing students with opportunities to practice the traits in the classroom, and managing classrooms with character-based strategies;
- Assessment: which includes teacher input, regular student self-assessments, and a Performance Character portfolio in which students collect evidence and examples of their growth in each trait; and
- Community and Culture: which includes Performance Character trait growth conversations that include parents, students and teachers, and the integration of the Athlos Roots social studies program (as described in the social studies section above) designed to help students learn about who they are and where they've come from to build confidence and self-esteem.

Athlos schools are places where classrooms are safe and engaging; students, staff, and families share key values and goals; and the community at the school promotes equity amongst all students. Part of the development of Performance Character is assessing the implementation of social and emotional learning (SEL). Another component is to practice positive behavioral intervention and supports (PBIS) and the use of Panorama surveys that provide data about the perception of students and teachers on their school experience. The chart below outlines the development of Performance Character in Athlos schools.

<i>Bridge Student Measures</i>	<i>Program Measures</i>
<ol style="list-style-type: none"> <li>1. Student self-assessment</li> <li>2. Student-led conference</li> <li>3. SEL surveys through Panorama (student self-perception and teacher perception)</li> <li>4. PBIS data (student office discipline referrals)</li> <li>5. Attendance</li> <li>6. Academic achievement</li> </ol>	<ol style="list-style-type: none"> <li>1. Implementation rubric</li> <li>2. SEL surveys (school climate)</li> <li>3. PBIS data</li> </ol>

The assessment process at AAI will develop student's self-assessment strategies focused on content and character habits. Duckworth and Yeager describe the limitations and advantages of current methods regarding assessing social-emotional learning.<sup>19</sup> They recommend a multi-pronged approach that includes self-reported data, teacher-reported data, and the use of performance tasks. Duckworth and Yeager advise against schools using scores to compare one another or as an accountability measure for program evaluation due to bias and the practice of faking results in high-stakes settings.

AAI will measure Performance Character in a variety of ways, primarily using formative assessment methods that support student learning and program development. Consistent with the recommendations of Duckworth and Yeager who note that "the field urgently requires much greater

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<sup>19</sup> (Duckworth & Yeager, 2015)

clarity about how well, at present, we are able to count some of the things that count”, AAI’s current assessment practices of Performance Character are aligned with current research and will continue to be as the research evolves. Three primary assessment strategies will be used:

**Surveys:** AAI will participate in semi-annual SEL self-assessment and student assessments by teachers, using valid and reliable measures developed by Panorama Education. Athlos Academies (ESP) currently partners with Panorama Education, a nationally recognized consortium that works with over 6,500 schools, in using norm-referenced questions that can be compared to a large national sample. This comprehensive data informs culture-building efforts and recognizes where additional professional learning should be focused. The survey (measuring the same areas) is given twice, first at the end of the first semester and again close to the end of the school year. Data can then be used to adjust and focus on second-semester improvements. By using the outcomes of Panorama during the review of other school-wide assessment information, the school leadership is able to holistically inform the ways in which they intend to address strengths and weaknesses in student performance and student experience.

**Artifacts:** Throughout the school year students collect evidence of performance character growth through related artifacts that may often include examples of student work for which the student has identified as exemplary of their application of performance character. Students provide reflections on these artifacts in an attempt to justify their use as evidence for performance character. Both the artifacts and their associated reflections are included in student portfolios and discussed during student-led conferences.

**Observation:** Performance Character traits and SEL skills can be difficult to measure precisely because they are difficult to observe. Despite this challenge, observational data is used where possible to evaluate students’ demonstration of trait-associated skills. These observations inform teachers’ responses to the SEL surveys administered through Panorama Education.

Program effectiveness is dependent upon the quality of implementation. Through a series of both on-site and virtual professional development opportunities and clearly defined expectations articulated in the pillar implementation guide, Performance Character strategy implementation is carefully and routinely monitored for fidelity. The ESP staff meets weekly with school leader to discuss implementation and fidelity, provides at least four site visits per year for professional development and fidelity checks, and includes Performance Character practices in all walkthrough and evaluative tools used at AAI. All of these systems are done for each of the three pillars and is inclusive in the school-wide strategies support from the ESP.

#### *Instructional Strategies*

The Athlos educational model is supported by instructional strategies that promote critical thinking processes and constructive social interactions throughout all three pillars. Recognizing the importance of cognitive dissonance, metacognition, and engagement, these strategies present information and concepts in ways that will motivate students to ask questions, seek answers, and solve problems. A positive learning environment that is safe and trusting will promote growth and achievement when paired with these strategies.

#### *Inquiry*

The power of inquiry is harnessed to motivate and engage learners. Curriculum, at the lesson and unit level, is presented in a way that sparks students' innate curiosity and creates a need-to-know mentality. Each learning experience begins with a hook that grabs students' attention. There are opportunities to investigate data, collaborate to build new understandings, explore different positions, and develop solutions. Students read, write, research, and are curious because they are interested in furthering their own learning.

#### *Active, Student-Centered Learning*

The Athlos classroom is one where students are actively thinking, speaking, writing, reading, and moving throughout the day. Teachers use strategies that ensure active participation of students for individualized learning and check for students' understanding of the content. Teachers will use instructional strategies including gallery walks, chalk talks, and cooperative learning. Students will work together in small groups on shared tasks or activities that may have varying complexity and duration. AAI teachers will use a variety of teaching strategies to prepare students for realistic situations they will encounter in future schooling, work, and life.

#### *High-Quality Work Processes*

In preparation for future success, students will learn work processes to help them develop high-quality products such as publications or presentations. Teachers will help facilitate an iterative process that leads to a well-crafted product. Students will examine exemplars, develop criteria, and participate in a feedback/revision cycle of peer-critique, teacher feedback, and collaborative assessments. These strategies and processes include formative assessments that will foster students' reflection skills.

#### *Student-Engaged Assessment Practices*

Self-engagement is part of fostering the development of lifelong learners at AAI. Teaching students self-assessment practices allows them to take more responsibility for the learning experience at the lesson and unit level. Through other structures, such as student portfolios and student-led conferences, students will be asked to identify strengths and challenges and determine areas for improvement. In both the classroom and on the turf, students will be encouraged to reflect on their own achievement and work habits and set goals, all of which are skills they can continue to draw upon in their educational and work careers.

#### *Project-Based Learning (PBL)*

As an instructional practice, PBL utilizes many strategies already described. Researcher John Thomas identified five key components of effective project-based learning: 1) centrality to the curriculum, 2) driving questions that lead students to encounter central concepts, 3) investigations that involve inquiry and knowledge building, 4) processes that are student-driven, rather than teacher-driven, and 5) authentic problems that people care about in the real world.<sup>20</sup> At AAI, teachers will utilize inquiry and PBL to encourage students to think critically and solve problems.

#### *Technology-Based Instruction*

To prepare students to both participate in and contribute to a society increasingly saturated and driven by digital influences, teachers will integrate technology in the classroom in relevant, meaningful ways. Technology is most effectively incorporated when it is used to support already existing curricular goals, and it should encourage active engagement, participation in groups, frequent interaction and feedback,

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<sup>20</sup> (Thomas, 2000)

and connection to real-world experts. AAI teachers will incorporate technology in conjunction with other teaching methods; in other words, technology will be used to inform, support, and advance other forms of instruction.

[Scope and Sequence](#). Please see Attachment 6.

### Pupil Performance Standards

Students who achieve at levels deemed acceptable by the Indiana Academic Standards will be promoted to the next grade. Any decision concerning promotion or retention will be made after considering all facts related to academic achievement, physical development, maturity, and emotional factors collected from a wide range of sources throughout the year.

Students must demonstrate that they have mastered grade-level expectations before being promoted to the next grade. Grade-level expectations are based on the following:

- Scores on achievement tests;
- Previous academic history;
- Communication and partnership with the family's input;
- Teacher evaluation of student's abilities, motivation, and effort;
- Proficiency on state-mandated summative assessments;
- Attendance

When a student is identified as being at risk of retention, the student's parent/guardian(s) will be notified in writing as early in the school year as practical by the school leader. The parent/guardian(s) must sign a letter agreeing or disagreeing with the decision, and shall be provided an opportunity to consult with the teachers and the school leader concerning the decision to retain their child.

[School Calendar and Schedule](#). Please see Attachment 8.

### School Culture

The Performance Character program will shape and define the student culture at AAI. The school will encourage students to meet their life with honesty and courage by fostering and developing the 12 Performance Character traits. Students will show:

- Grit by meeting challenges and preserving following a failure
- Focus/self-control by focusing mind and body to avoid distractions and concentrate fully
- Optimism by believing their efforts will improve the future
- Curiosity by demonstrating passion for learning
- Leadership by making decisions that motivate others to action
- Energy and zest through engagement in life daily
- Courage to take risks and stand up for what is right
- Initiative to take action without being asked
- Social intelligence by learning to navigate relationships and interactions with others with respect
- Humility by allowing accomplishments to speak for themselves
- Integrity to strive to do the right thing all the time
- Creativity by designing distinctive solutions to problems

AAI's staff will regularly have opportunities to participate in professional development to assist them in incorporating Performance Character education into their individual curriculums, as well as the broader school culture. The school's Performance Character coaches will also serve as a resource and support for teachers and performance coaches as they incorporate Performance Character development throughout the school year. Staff will help encourage students to adopt healthy habits in their choices and behaviors as they consistently model the lifestyle and wellness habits themselves. AAI will support teachers as lifelong learners, creating a culture of continual growth and development where every staff member has valuable insight to share. Through this shared culture, teachers will understand that a large part of instilling students with Performance Character is embodying and modeling those traits for them.

The verbal and non-verbal cues that both adults and students use affect daily interactions and are undoubtedly a significant contributor to fostering a school's culture. Teachers use a positive classroom behavior approach that integrates restorative practices and avoids punishments, offering consequences instead. Also, students and teachers consider the meaning behind the growth mindset, finding ways to model and embrace a climate that seeks improvement.

Helping deepen understanding of a culture of improvement, teachers will use the LMS to work through courses on this topic. These, and other culture-building resources, serve to offer professional development to the AAI staff before the school year begins and throughout the year. Athlos Academies (ESP) has designed courses that assist staff in efficient and timely learning for engaging students entering classrooms at any given time during the school year.

School culture will be at the heart of AAI's success. Making sure that everyone, including students, staff, and parents, are aware of cultural expectations and receive direction on how to meet AAI's expectations is key. Athlos schools take this to heart and facilitate the creation of staff culture clubs that collect evidence and best practices within the school and showcase expectations around behavior and school structures.

## Supplemental Programming

### *Summer School*

AAI will operate on a balanced academic calendar reflecting the year-round school model of the surrounding districts. As such, the school will not offer a traditional summer school program, but may provide student support through before or after school programming for students with a large achievement gap to improve their performance throughout the year.

The school leadership will utilize state funds for required remediation windows. AAI intends to provide summer support in several prioritized areas that include students who have not passed the IREAD in 3<sup>rd</sup> grade as well as any student who has not achieved proficiency on standardized assessment mandated by the state. AAI will look to school partnerships such as local non-profits to further support students throughout the year. AAI will organize a special information session for families to learn about summer opportunities as early as February with follow-up meetings during the spring. This proactive parent outreach will help to support families who may not have access or awareness of opportunities for their child to continue their learning and development beyond the walls of the school and during the summer months. It is a priority for AAI to stay ahead of the needs of parents and students to best open doors for their continued success.

## Special Populations and Student At-Risk

### *Social Emotional Learning and Support*

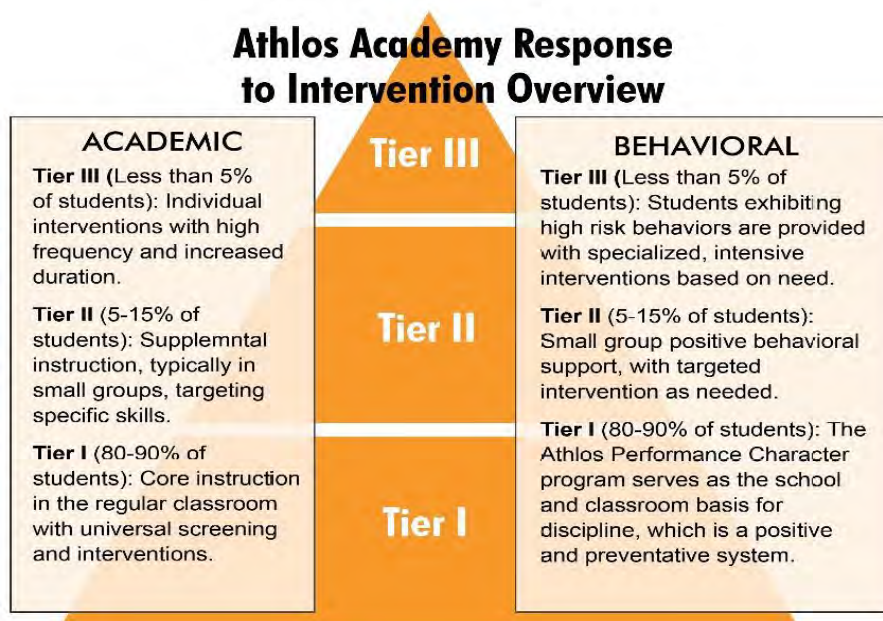
The Performance Character pillar works with the Prepared Mind curriculum and Healthy Body program to support an educational environment that meets the needs of the whole student: emotionally and socially, as well as academically and physically.

Students needing social and emotional remediation will go through the Response to Intervention (RTI) process as explained in the section, *Special Education and At-Risk Students*. Teachers will identify students early on if they have emotional needs that require RTI. As part of their professional learning communities, teachers will brainstorm with small groups of teachers on the many strategies that can be used. Like academic remediation, social and emotional remediation efforts will be tracked, measured, and monitored on an ongoing basis. Remediation efforts will be based on setting goals for remediation cases, documenting intervention, and assessing whether students are meeting their individual goals. Another effort to track the social and emotional well-being of students will be through the climate and culture surveys collected at strategic times throughout the year.

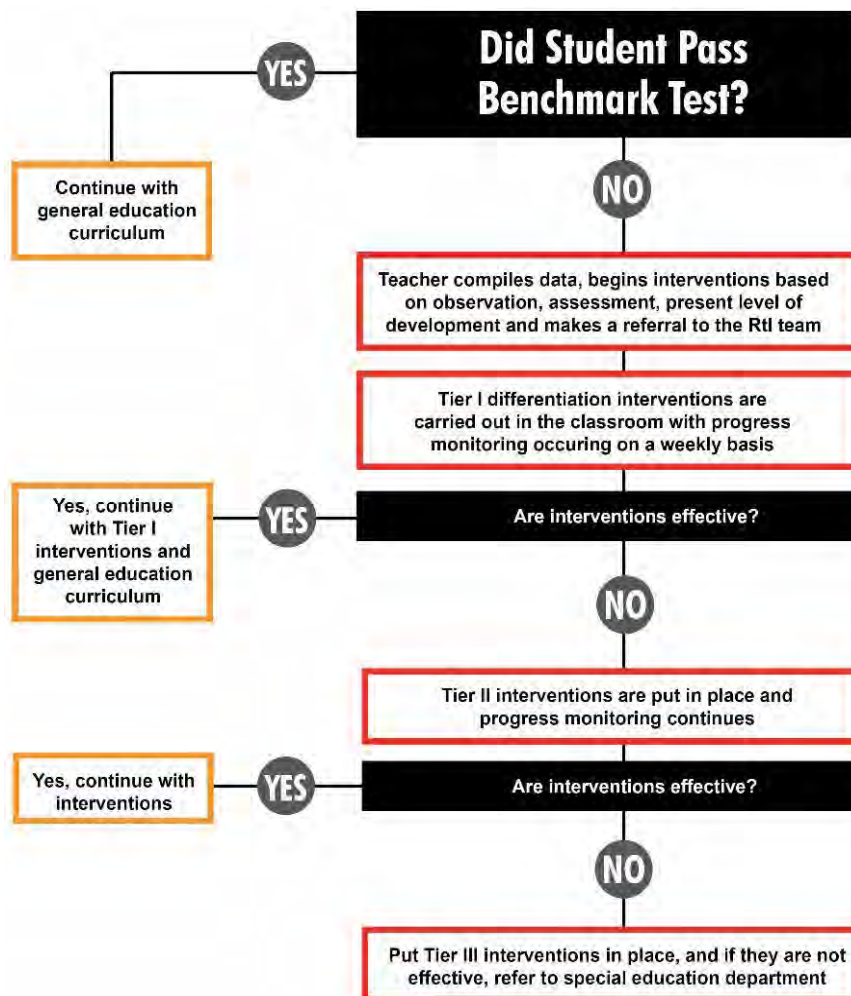
As mentioned in the above section, school leadership will provide proactive opportunities for parents and families to support their student's growth. The governing board and school leadership will continue to seek and maintain healthy partnerships with local area organizations that have these opportunities for students and families beyond the structures and experiences afforded at the school.

### *Special Education Services*

The Response to Intervention (RTI) plan at AAI will provide intensive, high-quality instruction and interventions aimed at supporting the learning or behavioral needs of each student. Targeted interventions will be provided prior to deciding if a student has an exceptionality requiring special education services. The results of these interventions will drive ongoing instruction, regardless of whether a student is in special education or general education. Below is a chart outlining the Athlos three-tiered RTI approach designed to address student needs.



Universal screening to benchmark all students will occur three times a year. This screening will determine appropriate tiers for all students. The RTI process will begin when the referring teacher contacts a member of the RTI team, which consists of school leadership, instructional coaches, student support director, counselor, and potentially other staff members, to schedule an appointment for an initial meeting. In this meeting, the referring teacher will present specific, relevant data to define the issue. Collaboratively, the referring teacher and RTI team will examine all possible contributions to the noted issue; such contributions may include the quality of previous learning instruction, attendance, and/or the absence or limitation of basic skills. The referring teacher and the team will then attempt to accurately identify needed skills. They will brainstorm to determine possible research-based interventions. Once an intervention is determined, the referring teacher will implement it in the classroom and collect ongoing data. After data collection, the RTI team will meet again with the referring teacher to evaluate the intervention plan's effectiveness. If the intervention plan is not successful, the team will re-evaluate the situation. If the intervention(s) are successful, they will then periodically examine trends and patterns in referrals which may be addressed universally.



### *Identification*

AAI will use the RTI plan to identify students with potential academic or behavioral issues. Reviews of formative and summative academic assessments will help determine if students are at risk academically.

Teachers at the school will receive training at the beginning of each school year and throughout the year on relevant topics. Teachers will meet individually with the student support director or with the entire Individualized Education Plan (IEP) team for a given child to ensure all aspects of the IEP are understood and prepared for so that services can begin on the first day of school. Teachers are informed of students' status with an IEP on a need-to-know basis, as is consistent with the school's FERPA policy.

AAI will implement Child Find to ensure all students with disabilities who may need special education and related services are identified, located, and evaluated. Parents and guardians may also request an evaluation to determine if their child has an exceptionality. Evaluations may also be initiated by the student support director if an extended RTI process indicates that further intervention may be needed. Initial evaluations will take place, with parent approval, to determine if the student has an exceptionality and needs special education services. Follow up evaluations will help determine all the child's educational needs. After an evaluation, school representatives will meet with parents to discuss the evaluation and any other information about the student's educational needs. After this post-evaluation meeting, another meeting will be held to develop an IEP for the student.

Parents will be asked on registration paperwork to indicate whether their child has an Individualized Education Plan (IEP) or 504. This information will allow the student support director to initiate a review to ensure that appropriate services are in place before the student's first day of school. The office manager will be trained and instructed to notify the student support director of all incoming files with special conditions that require accommodation an IEP or 504 plan.

At the IEP meeting, parents and school representatives will work together to determine the special education services and support that meet the student's needs. The IEP team will consist of the appropriate parties, including parents, a lead administrator, student support director, teachers, and other instructional staff who are most involved in the student's academic day.

### *Instructional Practices*

#### *Evaluation*

The school leader will measure discipline referrals and attendance records at least monthly to help identify students who are at-risk.

#### *Graduation*

The school leader will work with parents, teachers, and students to convey the elements of the student promotion process. The school leader will also ensure that, through professional learning communities (PLCs) and teacher professional development time, each student is tracked accordingly within the identified promotion criteria. This ensures each student that needs additional supports toward promotion can receive the intervention he or she might need.

#### *Staffing*

AAI will hire and contract with qualified staff to work with students with disabilities. Partnering with Athlos Academies (ESP) offers the ability to support national searches for highly-qualified staff to meet the needs of all students. As the needs of the students change and grow over time, the inclusion of



specific staff members will need to be adjusted. The governing board, the school leadership, and Athlos Academies (ESP) will work together throughout each year to make sure the staffing model is on track to fit the needs of all students at AAI. Teachers will receive training at the beginning of each year on identifying students who may have special education needs. In addition, teachers will be provided additional training in all other relevant topics regarding special education as needed throughout the year. School leadership and the network support of the ESP will work to ensure that the school meets speech, occupational/physical therapy, counseling, and any other services identified in the IEP. This can be achieved through local support at the school, through partnership opportunities with a local district or non-profit, or through a national opportunity in partnership with the ESP.

## English Language Learners

### *Identification*

AAI will initially identify English Language Learners (ELLs) through the student enrollment process, which includes a Home Language Survey (HLS) provided to parents in their spoken language or through an interpreter to ensure accurate responses. HLS information is used only to identify students who may need ELL support to appropriately access and engage with the curriculum. If a student is identified as potentially needing ELL services, he or she will be screened using the WIDA-ACCESS Placement Test (W-APT) screening tool. Upon classification, the ELL coordinator will keep students' assessment records and progress monitoring forms in the student's file on record in compliance with FERPA. Teachers working with a student will have access to the file. For students coded as fully English proficient, the school will monitor the students for two years after they have been classified as proficient. The ELL coordinator, with the help of the registrar and other office staff, will notify appropriate staff of W-APT assessment results. The student support director and teachers will share appropriate information with parents of ELL students.

### *Instructional Programs and Support*

Schools in the Athlos Academies (ESP) network strive to serve their English language learners with quality instruction, inclusive practices, differentiated instruction, and access to appropriate grade level content. The goal of Athlos Academy of Indiana is to support teachers school-wide through continued professional development to support the needs of all students in an inclusive classroom, including the ELL population. There is no quick and easy solution for closing the gap between ELL students and those who are native English speakers. ELL students at AAI are educated in language rich classrooms encompassing a project/inquiry-based approach to learning. As a result, AAI will utilize supplemental programming that is appropriate to their specific population needs with a foundational framework of the World-class Instructional Design and Assessment (WIDA) standards and will be trained in Pearson's Sheltered Instruction Observation Protocol (SIOP) model to directly support students' academic language skills and comprehension.

The use of WIDA and SIOP help to support a collaborative and inclusive approach to serving the ELL population at AAI. This approach works toward student accommodations, and differentiating instruction focused on English language development with emphasis on increasing vocabulary, reading strategies, reading comprehension, writing skills, and cultural understanding.

In an effort to best serve ELL students, AAI outlines the following goals for ELL programming. In addition, this section details the collaborative approach that all school professionals will take to achieve

and measure these goals. School professionals include ELL Coordinator, instructional coaches, administrators, teachers, and members of the Multi-Tiered System of Support (MTSS) Data Team.

**Goal 1:** ELL students will develop and maintain listening, speaking, reading and writing competency in English as outlined in the World-class Instructional Design and Assessment (WIDA) standards and measured by the ACCESS for ELLs assessment.

*Approach:* Data from the ACCESS for ELLs assessment will be used to determine students' exact competency in each of the four areas. Working in collaboration, the general education and ELL teachers will design units and lessons to meet the needs of ELL students.

**Goal 2:** ELL students will demonstrate growth towards proficiency as measured by mandated state assessments, school benchmark assessments and curriculum-based measures such as formative and summative assessments.

*Approach:* General education teacher, ELL teacher and MTSS Data Team members will monitor student proficiency on grade level expectations and give feedback to students and families. Assessments are modified and accommodated to best meet student needs and reflect what students have learned.

**Goal 3:** ELL students will develop and apply academic language as measured by curriculum-based assessments.

*Approach:* Academic language development within vocabulary-rich environments will be provided to students within the general education classroom. For students who need more individualized instruction, language development and vocabulary instruction will also occur as supplemental support services.

**Goal 4:** ELL students and families will be members of and participate in the school community.

*Approach:* The school will provide opportunities for school, family, and community partnerships to support families in becoming actively engaged in their child's educational experiences. Co-curricular activities such as athletics and clubs will be accessible to all ELL students.

**Goal 5:** School staff will work cooperatively with ELL teachers through collaboration and resources in order to maintain best practices, including alignment with WIDA and use of SIOP, to build capacity for educating ELLs school-wide.

*Approach:* Through job-embedded and additional professional development opportunities, school personnel will receive training and coaching in cultural competency strategies and approaches aligned with best practices for English language learners.

#### *Assessment of ELL*

Athlos Academies recommends assessments that can assist in diagnosing the instructional needs of ELs, monitor progress over time, and assess annual linguistic and academic growth. This comprehensive view aids in linking instruction to the specific assessment results of the student and helps in assessing the school's progress towards meeting annual achievement results. The following matrix represents this broad range of assessments.

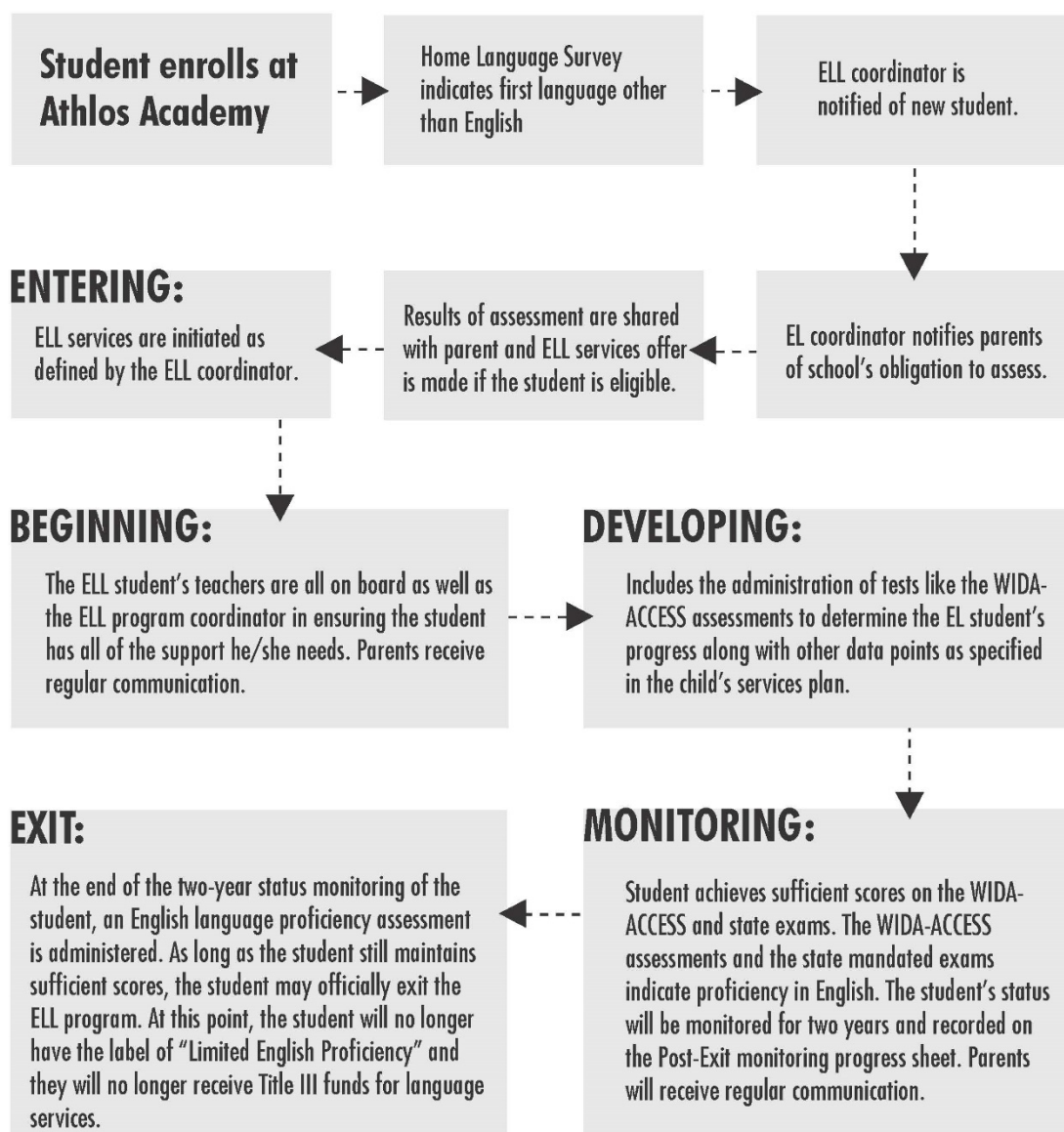
Assessment	Purpose	Type	When Administered	What is Assessed?
ACCESS for Proficiency	Determining growth and proficiency	Summative	January	Listening, Speaking, Reading, Writing
Language Proficiency Checklist (Appendix G)	Monitoring growth	Checklist	Fall: November/December Spring: April/May	Speaking, Listening, Reading, Writing
Middle/Secondary (Content & Language) Inventory (Appendix H)	Monitoring Growth	Formative	Staff determination	Speaking, Listening, Reading, Writing
Elementary (Content & Language) Inventory (Appendix I)	Monitoring Growth	Formative	Staff determination	Speaking, Listening, Reading, Writing
School Benchmark Assessments	Determining growth and proficiency	Benchmark	Fall, Winter, Spring	English Language Arts, Mathematics
Mandated State Assessment	Determining annual growth and proficiency	Summative	Spring	English Language Arts, Mathematics
WIDA-Access Placement Test (W-APT) or Measure of Developing English Language (MODEL)	Instructional Placement	Formative	Within 30 days of enrolling in school or 14 days after, October 1, for students with a home or primary language other than English	Listening, Speaking, Reading, Writing
Other bodies of evidence include: progress monitoring assessments, formal or informal content-specific achievement assessments, diagnostic assessments, developmental or achievement checklists, observations documented through anecdotal records and portfolios, language samples, surveys, parent, teacher and student questionnaires, student performance tasks, learning logs and journals				
Program Monitoring	Identify areas of concerns, propose program modifications, set new program goals	Summative, Informational, Checklist	Annually	Comparison results, modification of program needs

The W-APT, and ACCESS test forms and administration manuals (PDF Files) are available to all WIDA Consortium member states at no additional cost and are reproducible. Each school's test coordinator's username and password must be entered to view or print these files on the WIDA website.

English language acquisition data will be analyzed as part of the school's improvement goals and expectations by the MTSS Data team. This team will collaboratively review formal and informal data sources to craft and implement effective instruction for all students in meeting proficiency standards. The process for ELL services at-a-glance can be seen in the roadmap on the following page.

# Process At-A-Glance

## ELL Services Plan



## Underperforming Students

Students who exhibit academic underperformance will go through the Response to Intervention (RTI) plan. Identification strategies include regular interim, formative, and summative assessment screeners, such as Measures of Academic Progress (MAP). Intervention and remediation strategies escalate depending on the student's RTI tier. Teachers and staff will continue monitoring students to ensure students are making gains. AAI will also establish data inquiry teams, composed of staff and paraprofessionals, to see if students are making gains, look at interventions and their efficacy, and potentially modify plans and strategies. These teams will meet monthly to monitor the progress of all students, especially those identified via screening assessments employed at various points in the school year.

Athlos Academies (ESP) will support AAI in establishing and operating a data inquiry team. Athlos Academies (ESP) can also suggest intervention programs and methods. Remediation will also be part of professional development, with instructional coaches serving as a support resource.

Data inquiry teams will track a range of data to measure the impact of remediation efforts. AAI will notify parents when and how the school will conduct testing and screening. Parents will also be notified if their student needs extra support, as detailed in the description of our RTI process. More intensive remediation efforts will likely require in-person meetings with parents.

## High Ability Students

AAI will follow all gifted, talented, and high ability student (HA) screening, eligibility requirements, evaluation procedures, and reevaluation procedures required by state law. The student support director and student support director will oversee these procedures. HA students at AAI will receive differentiated curricula in the form of acceleration, increased complexity, additional content, increased multi-disciplinary connections, and/or projects.

For students recommended as HA by parents or school officials, a team will form to consider eligibility based on evaluation procedures and tools. If the student is determined to be HA, a new IEP will be developed by the student support director and/or appropriate staff. Teachers will receive professional development in HA student education to ensure understanding of a range of HA issues, including social and emotional needs, best differentiation practices and strategies, options for acceleration, program implementation and evaluation, and strategies for identification.

## Student Recruitment and Enrollment

AAI will develop important relationships with parents, students, and the business community within Southeastern Marion County and surrounding areas following practices Athlos Academies (ESP) has used to successfully attract students to new charter schools. AAI will abide by the Indiana Administrative Code for all policy and procedure development. The board of AAI will assist with student recruitment and enrollment through activities in the community. The following list represents key elements of our recruitment timeline, assuming approval.

*School Website*—The school website will provide information about the school's vision, mission, and programs.

*Social Media*—Athlos Academies (ESP) will execute an ongoing social media campaign. Social media outlets, including the school's website, will be managed jointly by AAI and the ESP.

*Press Releases and Advertising*—Athlos Academies (ESP) will release statements to local media outlets periodically notifying them of our progress and programs and purchase advertisements through various media outlets to create community awareness.

*Mailings*—Athlos Academies (ESP) will use targeted mailing lists. Informational mailings will be designed for the demographic trends of the primary attendance area to generate interest in enrollment.

*Public Parent Meetings*—Beginning in January 2018, the board and school leadership, with support from Athlos Academies (ESP), will conduct at least two events monthly to inform families and other interested community members of AAI, the model, and the difference its made for students in other network schools. Meeting notifications will be communicated to the community through various forms.

*Construction Site Signs*—Construction site signs will be placed at site locations determined to be most visible and effective for communicating to local commuters. The site billboards will include a school rendering, site plan, and the school’s contact information for enrollment.

*Word of Mouth*—With support from Athlos Academies (ESP), the board and the school’s executive team will work diligently to engage community members who express interest in AAI. The school and Athlos Academies (ESP) will track contact information for people interested in enrolling their child at our school through a database and send out frequent email updates about the school’s progress. Further, AAI will identify parents and community members who are enthusiastic about the school and/or its model and engage them in outreach and enrollment activities, including taking part in the public parent meetings.

*Facility Tours*—Prior to school opening, and subject to availability, the facility will be open for tours to the public. Tours of the facility will increase enrollment numbers by providing families with the opportunity to experience the facility in which AAI expects to help our students grow.

*Grand Opening*—Once the facility is completed, AAI will have a grand opening where the community will be invited to see the school and learn about the Athlos model.

Athlos Academies (ESP) will provide continued recruitment support for the life of AAI. Athlos Academies (ESP) will support marketing efforts, including online, on-the-ground recruitment and backfilling procedures in compliance with state law. The school data system will help keep track of enrollment and identify any grade levels that may need backfilling (filling enrollment as openings allow for students throughout the year).

[Enrollment Policy](#). Please see Attachment 9.

## Student Discipline

AAI will support a philosophy of restorative discipline based on the Athlos Performance Character pillar. The goal of restorative disciplinary practices is to prevent and reduce disciplinary action by developing a school culture that supports respect, responsibility, and cooperation between all members of the school community.

The Athlos Academies (ESP) Positive Behavior Support Plan (PBSP) focuses on creating a safe, supportive, and caring school environment; addresses conflict; and endeavors to build a positive school culture. The PBSP is framed around Athlos’ overarching pillars of Prepared Mind, Healthy Body, and Performance Character. The PBSP functions alongside the academic RTI process within the school-wide

multi-tier system of supports (MTSS) that provides intervention and support from both an academic and behavioral perspective. The PBSP utilizes a Positive Behavior Interventions and Supports (PBIS) model combined with restorative practices and preventative instruction through the Performance Character pillar. The result is an approach to behavior management that focuses on teaching positive behaviors, establishing and maintaining healthy relationships, and helping students to see their behavior through the lens of Performance Character. Much of this instruction is delivered through Performance Character pillar strategies such as classroom huddles and classroom management strategies.

A PBIS approach also empowers Athlos schools to utilize data-driven decision making to address behavior concerns at both the school-wide and individual student level. In addition to responding to inappropriate behavior using positive reinforcement and re-teaching strategies, the PBSP incorporates restorative practices that focus on learning from the situation, as opposed to focusing on the rule broken, which leads to the maintaining of healthy relationships.

Features of the PBSP include:

- Team-led approach to implementation
- Clearly articulated school-wide expectations of behavior
- The use of data to drive decision making regarding behavior
- A continuum of consequences, consistent with a non-punitive and restorative approach
- Multiple teaching and learning opportunities tied to Performance Character and provided to foster pro-social behaviors in students

Plan implementation is led by a behavior team and follows a PBIS tiered implementation blueprint which includes school readiness and fidelity measures. Support for teachers and staff is provided through regular professional development and support by Athlos Academies (ESP) staff.

[Student Discipline Policy](#). Please see Attachment 10.

## Parents and Community

### *Local School Options*

Although AAI has not yet identified an exact location, the focus is to serve the populations of Perry, Franklin, Beech Grove, and IPS districts. Since AAI will be located near four surrounding townships, a full list of all local schools would be difficult to provide. Instead, the chart below is representative of the different schools and locations that serve a population similar to what AAI will serve within a five-mile radius of the intended area (southeastern edge of Beech Grove to draw from all four districts). As discussed in the Executive Summary, the surrounding townships have seen student achievement decline on assessments. AAI would provide an option for families looking for a high-performing secular school of choice with a unique model. The schools in the chart below have seen mixed academic success. AAI would be a school of choice that has network schools that have worked with student subpopulations that AAI can learn from.

School Name	School Type	Grades	Enrollment Overall	Enrollment by Grade	Letter grade
Bunker Hill Elementary School	District (Franklin)	KG-5	597	KG: 103 1 <sup>st</sup> grade: 98 2 <sup>nd</sup> grade: 108 3 <sup>rd</sup> grade: 111 4 <sup>th</sup> grade: 92	A

				5 <sup>th</sup> grade: 85	
Franklin Township Middle School-East	District (Franklin)	6-8	1,251	6 <sup>th</sup> grade: 379 7 <sup>th</sup> grade: 445 8 <sup>th</sup> grade: 427	B
Lillie Idella Kittey Elementary School	District (Franklin)	PK-5	1154	PK: 65 KG: 159 1 <sup>st</sup> grade: 181 2 <sup>nd</sup> grade: 191 3 <sup>rd</sup> grade: 191 4 <sup>th</sup> grade: 180 5 <sup>th</sup> grade: 187	D
Beech Grove Middle School	District (Beech Grove)	7-8	482	7 <sup>th</sup> grade: 236 8 <sup>th</sup> grade: 246	C
South Grove Intermediate School	District (Beech Grove)	3-6	711	3 <sup>rd</sup> grade: 3 4 <sup>th</sup> grade: 228 5 <sup>th</sup> grade: 263 6 <sup>th</sup> grade: 217	B
Irvington Community Elementary School (total network)	Charter	KG-12	1025	KG: 75 1 <sup>st</sup> grade: 75 2 <sup>nd</sup> grade: 75 3 <sup>rd</sup> grade: 76 4 <sup>th</sup> grade: 73 5 <sup>th</sup> grade: 75 6 <sup>th</sup> grade: 76 7 <sup>th</sup> grade: 75 8 <sup>th</sup> grade: 77 9 <sup>th</sup> grade: 79 10 <sup>th</sup> grade: 104 11 <sup>th</sup> grade: 81 12 <sup>th</sup> grade: 84	C
Christel House Academy South	Charter	KG-12	718	KG: 55 1 <sup>st</sup> grade: 53 2 <sup>nd</sup> grade: 54 3 <sup>rd</sup> grade: 54 4 <sup>th</sup> grade: 54 5 <sup>th</sup> grade: 54 6 <sup>th</sup> grade: 53 7 <sup>th</sup> grade: 54 8 <sup>th</sup> grade: 55 9 <sup>th</sup> grade: 74 10 <sup>th</sup> grade: 53 11 <sup>th</sup> grade: 59 12 <sup>th</sup> grade: 46	B
Southeast Neighborhood School	Charter	KG-8	540	KG: 74 1 <sup>st</sup> grade: 59 2 <sup>nd</sup> grade: 66	D



of Excellence (SENSE) Charter School				3 <sup>rd</sup> grade: 74 4 <sup>th</sup> grade: 64 5 <sup>th</sup> grade: 52 6 <sup>th</sup> grade: 52 7 <sup>th</sup> grade: 49 8 <sup>th</sup> grade: 50	
St. Jude Elementary School	Private	KG-8	494	KG: 46 1 <sup>st</sup> grade: 58 2 <sup>nd</sup> grade: 40 3 <sup>rd</sup> grade: 61 4 <sup>th</sup> grade: 52 5 <sup>th</sup> grade: 61 6 <sup>th</sup> grade: 60 7 <sup>th</sup> grade: 62 8 <sup>th</sup> grade: 54	A
Holy Name Catholic School	Private	PK-8	268	PK: 26 KG: 16 1 <sup>st</sup> grade: 24 2 <sup>nd</sup> grade: 24 3 <sup>rd</sup> grade: 25 4 <sup>th</sup> grade: 25 5 <sup>th</sup> grade: 37 6 <sup>th</sup> grade: 30 7 <sup>th</sup> grade: 24 8 <sup>th</sup> grade: 37	B
Mary Bryan Elementary School	District (Perry)	PK-5	893	PK: 55 KG: 144 1 <sup>st</sup> grade: 158 2 <sup>nd</sup> grade: 150 3 <sup>rd</sup> grade: 132 4 <sup>th</sup> grade: 133 5 <sup>th</sup> grade: 121	B
Abraham Lincoln Elementary School	District (Perry)	PK-5	980	PK: 68 KG: 152 1 <sup>st</sup> grade: 180 2 <sup>nd</sup> grade: 157 3 <sup>rd</sup> grade: 157 4 <sup>th</sup> grade: 132 5 <sup>th</sup> grade: 134	C
Clinton Young Elementary School	District (Perry)	PK-5	797	PK: 38 KG: 136 1 <sup>st</sup> grade: 117 2 <sup>nd</sup> grade: 148 3 <sup>rd</sup> grade: 126 4 <sup>th</sup> grade: 119 5 <sup>th</sup> grade: 113	D

### *Evidence of Demand*

Athlos' three pillar model and unique offering will attract a wide variety of families in Southeastern Marion County. While schools of choice are opening more frequently in Indianapolis, there are less options for families who live outside of IPS. According to the Indiana Department of Education, over the last five years 1,656 new students have enrolled in Perry Township's schools. AAI will work with Athlos Academies (ESP) to help with recruitment and enrollment. Athlos Academies (ESP) will provide resources and best practices that have been used to attract students to charter schools at their network of Athlos schools. Additionally, the board of AAI will plan a variety of outreach activities in the community to recruit and enroll students to meet the school's goals.

AAI will be able to draw students from multiple school districts by locating near the surrounding townships of Perry-Meridian, Franklin, IPS, and Beech Grove. These four school districts have all struggled with student achievement on standardized testing as discussed in the Executive Summary. IPS and Perry-Meridian elementary student achievement data was lower than the state average on math and English language-arts. Franklin saw a decrease in their scores for the 2016-17 school year on the literacy proficiency assessment, IREAD. Beech Grove student achievement dropped for the 2016-17 school year and saw a decline on both IREAD and ISTEP+. AAI will be a school of choice for families in the surrounding townships looking for a unique educational model that educates the whole child.

AAI will be successful by learning from the Athlos network schools that have learned how to work with all students, including students from different subpopulations. Perry Township and St. Cloud, Minnesota both have a unique culture and their communities have welcomed many refugee families. Athlos Academy of St. Cloud has taken initiatives to find ways for all families to be integrated into the school culture and community. The school has had community nights to have shared cultural learning experiences and has hired a diverse staff to foster relationships with Somali refugee students. These strategies have been successful and are examples of what AAI can use and learn from as they open and operate their school.

### *Parent Engagement*

AAI recognizes the importance of parental involvement in the educational process. The board will work with the school leadership team to develop a parental involvement plan for the school during the transition process and through opening. The plan will be designed to assist in building communication among parents/guardians, teachers, and administrators. This plan will promote a positive school culture for all.

AAI will strive to involve families in all aspects of the school including in the classroom. Families will be directly engaged in the classroom with the Athlos Roots program, which is part of the social studies and Performance Character curriculum. The school will also expand and enrich the focus of the classroom by engaging family members through student-led conferences and student work exhibitions to celebrate learning. As part of the partnership, the ESP will assist staff in implementing student-led conferences. Parents and students come away from student-led conferences understanding the growth that takes place in the classroom, both academically and pertaining to character building. During student-led conferences, students share a portfolio containing artifacts from all three Athlos pillars that provide evidence of their growth. Student-led conferences allow families to continually engage with the school and allow the opportunity for students to develop their mastery of the three pillars.

The school will encourage parents/guardians to support Athlos culture at home and send their children ready to learn at AAI. The school will have opportunities for parents/guardians to be involved in establishing and implementing educational goals for the school and its students. Parents/guardians will have the option to join groups or organizations such as the Parent Teacher Organization (PTO), which provides instruction and training for parents/guardians to take on leadership responsibilities in their child's academic success. Parents/guardians will also be invited to volunteer in classrooms and/or at school events.

The school will have various committees that families can be a part of to help engage with the school community. First, a safety committee will assist with developing the school safety plan. This committee will consist of the school leader and parents and will partner with local emergency management agencies. Families will also be invited to engage in the school's health and wellness committee. The committee will meet in the spring of the school's first year of operation to review the overall practices of the school, make recommendations for improvement, review school policy, and engage in projects related to health and wellness. After charter approval, the board will adopt a parental involvement policy that fits local needs and will further outline parental engagement strategies. The board will also define parameters for community use of facilities.

Athlos parents can also be involved with the life of the school through the school's website and social media. Families will know what is happening daily, as well as realize the importance of Athlos in their lives. Athlos encourages families to learn together and practice the culture of the school in their everyday lives.

AAI will conduct parent engagement nights to give parents who may be intimidated to engage a low-pressure environment to connect with the school. These events are tailored to best serve the community need. For example, Athlos Academy of Herriman hosted a math night that fostered family involvement in their child's learning. Athlos Academy of St. Cloud hosted a culture night where Somali families were invited to engage and teach the staff about the culture. These events will lead to meaningful relationships between the school and families.

### Community Resources

Community engagement and partnerships will be a fundamental support for the success of the school. Local area partnerships are purposeful in bringing an added value to the learning environment for students and parents at AAI. The parameters of this type of partnership are approved by the board to support each pillar of the Athlos model. The details of these partnerships will continue to be developed upon approval of the charter so that leadership staff and the board will be able to align the partnership commitments across the overall operational plan for the school. The board has developed criteria for partnership decisions to ensure the partnerships add value to the program, have sustainable impact with the community being served, and provide opportunities for both students and families.

The partnerships that will support AAI must be chosen wisely to support the overall mission and vision of the school – to see students that graduate from AAI become courageous, persevering, humble leaders who contribute to a better society and daily inspire others in their careers and communities to live fulfilling, responsible, and successful lives. To achieve this, the following criteria has been used to identify partners and community supporters for AAI:

- Partner organization commits to supporting the mission and vision of Athlos Academy of Indiana.

- Partner organization is willing and able to have volunteer presence in the school to support at least three activities throughout the year.
- Partner organization is willing and able to donate financially or through material resources that support the mission and vision of the school.
- Partner organization has a track record of successfully partnering with at least one other school (reference call/letter may be requested by the AAI governing board).
- Partner organization fits the niche of at least one of the three pillars (Healthy Body, Prepared Mind, and Performance Character) for added support in reaching student performance goals.

The AAI board has been actively engaging the community by doing grassroots efforts to establish community partnerships. The board has received support from Rep. Behning, Peace Learning Center, the Network Quality for Education (NQ4E), Marian University, and two local physicians. Rep. Behning is the Chair of the House Education Committee and he represents House District 91 since 1992. This includes parts of Marion, Morgan, and Hendricks Counties. The Peace Learning Center is dedicated to helping people develop social-emotional learning skills. AAI is excited to have this partnership to work in conjunction with the Performance Character pillar as part of a unified vision. The Network for Quality Education provides assistance to its member schools and helps develop public policy to ensure their members are represented at the state level. The Educators College of Marian University is a pioneering and innovative teacher prep program that is dedicated to creating high-quality educators to serve Indiana. This partnership will allow preservice teachers and leadership candidates to gain first-hand experience by having opportunities at AAI. The support from local physicians is part of AAI vision to have a school-wide culture of wellness. The AAI board will continue its grassroots efforts to find community partnerships and resources through ongoing social media efforts, meetings with local superintendents and legislators, and through connections that align with the Athlos model.

*Evidence of Support.* See Attachment 11.

## Performance Management

### *Additional Performance Goals*

In addition to the performance goals set forth by ICSB's Accountability System, AAI will also monitor progress and growth for elements of the three pillar model. AAI's board strives for students to be educated through the whole child approach and the goals reflect that. Goals set by the board at AAI will be focused on how students are mastering the three pillar model. The AAI board has outlined the evaluation of the goal and the target for each school year to ensure that student performance goals are being met. Students will meet achievement goals and develop a Prepared Mind. Students in grades 3-8 will achieve five percentage gains in reading and math on MAP. The first-year goal for 2019-20 will be achieving growth towards a seventy percent proficiency and in five years the goal will be a ninety percent proficiency rate.

### *Interim Assessments*

AAI will use Measures of Academic Progress (MAP) as a formative computer-adaptive interim assessment to determine what differentiated learning is needed. MAP is a credible assessment that is used in other states across the nation, and the assessment is aligned with the Indiana Academic Standards. MAP can measure growth, inform instruction, evaluate school programs, and identify staff professional development needs.

To identify academic needs, staff will use MAP to help students reach their levels of proficiency based on their benchmark data from the assessment. Staff will use MAP to drive instructional practices for the different populations of students the school will serve and use the assessment to project proficiency of students. Staff will use the Curriculum Based Measurement (CBM) through aimswebPLUS for progress monitoring if students are not at the predicted levels of proficiency. AAI teachers will utilize formative assessments as part of their instructional practices to help students master content.

AAI will also measure student achievement for the Healthy Body pillar. Students will learn and develop movement competency through the Healthy Body pillar. Students growth on SHAPE America and Athlos Academies (ESP) standards will be based on quarterly rubric-based assessments. This process is explained more thoroughly in the Healthy Body the *Education Plan* component of this section. AAI will also measure student growth for the Performance Character pillar using surveys, self-assessment, artifacts, and observations. This process is described in more detail in the Performance Character section of the *Education Plan*.

#### *Collecting and Analyzing Data*

Interim assessments will be used to monitor progress for school-wide populations. Subject-level assessments will be given in the fall, winter, and spring to assess whether students are achieving their benchmark goals.

Using students' baseline MAP assessments, teachers may adjust their instruction and students' level of progress-monitoring and Multi-Tiered Support System (MTSS). All data collected through assessments will be shared with the data inquiry team that utilizes a MTSS to provide tiered support. The data inquiry team is a group of teachers across different grade-levels, along with members of the leadership team. The data inquiry team will meet regularly as part of the MTSS process to dissect and analyze data from benchmark and progress-monitoring assessments and guide teachers' lesson planning and differentiation for those students they are tracking. Students who score above the 35th percentile will take the MAP assessment in the fall, winter, and spring.

Students who score between the 25th and 35th percentiles will be monitored once a month on reading and math through aimswebPLUS. Students will also receive differentiated instruction within the regular curricula. Students who score between the 11th and 24th percentiles will have progress monitoring every two weeks using the aimswebPLUS reading and math probes, depending on student need, and receive intervention outside of the regular curricula. This will include the general education classroom for reading and 30 minutes four times per week outside of the classroom using a research-based reading program. Students who score at or below the 10th percentile will be progress monitored weekly using the aimswebPLUS reading and math probes, depending on student need. They will also receive intensive intervention outside of the regular curricula such as in the general education classroom for reading and 30 minutes four times per week outside the classroom using a research-based reading program.

#### *Student Performance Management*

AAI will use PowerSchool to collect and report data, including assessments, attendance, and other needed personal information. Athlos Academies' (ESP) school data specialist will assist AAI's staff in analyzing and reporting student data. AAI will utilize a data inquiry team that will be responsible for assisting teachers in interpreting student data. The instructional coach and Athlos Academies' (ESP)

director of prepared mind will lead and coordinate any necessary professional development to foster student learning and achievement.

#### *Training for Analyzing, Interpreting, and Using Data for Improvement*

One instructional coach will be designated to oversee the interim assessment process. Athlos Academies (ESP) will work with and train the instructional coach and the school leader on best practices through courses available on the learning management system (LMS) and will work with the school leadership team to analyze the data. After the training, the instructional coach will be responsible for training other teachers at AAI. The data inquiry team will also have access to a LMS course specific to the data-inquiry process to use as a guide for their work.

Athlos Academies' (ESP) chief school operations officer, chief programs officer, and Prepared Mind staff will support AAI staff in the assessment process. MAP also offers some training for teachers and leaders, and training will be part of the data-inquiry team process. Teachers will be taught to step back from individuals' results and look for patterns within interim assessments.

#### *Corrective Action*

After student academic achievement is received at AAI, the school leadership and staff will analyze the data schoolwide. In addition, they will analyze data results by content areas, results for new students at the school, and patterns of results by content, grade level, or classroom. In addition to meeting stated academic goals, AAI aims for continuous improvement across the school.

If certain classrooms are not meeting the expectations, the school leadership team and staff will look at teachers, instructional programs, and the formative assessments used in the classroom. Based on the findings, corrective actions will divide larger remediation and improvement goals into smaller, achievable steps.

## Section III: Implementation Plan

### Legal Status and Governing Documents

**Governance Documents:** See Attachment 12.

**Bylaws:** See Attachment 12.

**Statement of Assurances:** See Attachment 13.

### Human Capital

#### School Staffing Structure

**Organizational Chart:** See Attachment 14.

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

#### Teacher recruitment

AAI will begin recruitment efforts for teaching staff after receiving charter approval. Efforts will include attending local teacher hiring fairs, as well as posting positions on the school's website, at local and regional university career centers, in newspapers, and on national teacher recruitment sites such as SchoolSpring. All teachers who apply for positions at AAI will be subject to state licensing laws regarding background checks. The hiring process for teachers includes: initial application review, screening interview, in-person interview, and finally an invitation to plan and demonstrate a model

lesson. Potential hires will be presented to the board prior to extending an offer, which will be done in writing and in compliance with all applicable employment laws. All employees will participate in a new employee orientation prior to reporting to duty.

AAI's licensed employees are required to hold a valid teaching certificate, permit, or other document equivalent to that which a teacher in other public schools would be required to hold. Teachers must have graduated from an accredited program. Transcripts must be submitted at time of hire. Substitute teachers shall be cleared in the same manner. The ideal Athlos teacher will:

- Have proper experience and/or education
- Demonstrate and appreciate the 12 Performance Character traits
- Maintain an instructional philosophy closely aligned with the school's stance, and
- Exhibit a growth mindset.

Multiple avenues will be used to showcase Athlos, to attract top talent and to utilize existing staff or candidates from a growing national network. The school leadership will be the lead on staff hiring with the support of Athlos Academies (ESP) and approval of final candidates by the governing board. Once teachers apply to the school they will participate in the hiring process including an initial profile, professional inventory, and job specific inventory. After completing these steps, the school leader will interview top candidates using a structured approach. The process will help identify the best fit for the school, aligning great teachers with a powerful model for learning.

#### Maximizing Staff Impact

A supportive workplace will be key to teacher retention for AAI. Research by Hirsch and Emerick shows that "teachers with positive perceptions about their working conditions are much more likely to stay at their current school than educators who are more negative about their conditions of work, particularly in the areas of leadership and empowerment."<sup>1</sup> Athlos Academies (ESP) has identified and created plans to foster the following areas that contribute to a supportive workplace for AAI employees:

*Time:* AAI leadership will be mindful of how to organize school days and staffing to ensure teachers have adequate time to prepare for, assess, and reflect on student work. Paraprofessionals will assist teachers with this workload. Daily physical activity sessions and other electives, such as music and art, provide classroom teachers with consistent planning time during the school day. Additionally, several full days throughout the school year will be set aside for teacher planning and professional development.

*Strong Leadership:* Hirsch and Emerick also found that schools with high teacher turnover possessed leaders who did not adequately support their staff.<sup>2</sup> The school leader will recognize teacher accomplishments and continually communicate support for teachers; she or he will treat teachers as experts in instruction and learning and invite them into conversations about school policies such as discipline procedures or professional development planning. The leader will also maintain excellent communication regarding all school policies and initiatives.

Athlos Academy of Indiana's leadership team will be comprised of a diverse group of leaders with wide-ranging capacity. Team members will include the school leader, assistant director, student support director, student support director, lead instructional coach, lead athletic performance coach, and lead Performance Character coach. These seven individuals will bring a range of background and expertise to leading the school. AAI will use the same recruitment strategies as with all of its staff to find a leadership team that will lead the school to success.

Both the school leader and assistant director will have strong capacity to oversee operations and governance along with quality leadership that empowers and builds a culture of excellence. All leadership team members will analyze data and collect anecdotes that speak to the school's performance. Each pillar leader (lead instructional coach, lead athletic performance coach, lead Performance Character coach) has a unique responsibility to ensure top performance within each pillar, along with integration throughout the school. With ongoing assessment and continual collaboration around performance, the leadership team will be well equipped to lead teachers and staff to modify for effective implementation of school-wide strategies to support student achievement.

*School Culture:* The school culture at AAI will revolve around the Performance Character traits. Thus, teachers will feel inspired and empowered to invest time in regular self-improvement. The culture at AAI will celebrate strength and embrace weakness with a growth mindset. This culture will be driven by strong school leadership, instilled in classrooms by passionate teachers, and thus fostered in student lives.

*Instructional Coaching:* Instructional coaches will have a keen understanding of adult development, excellent listening skills, effective communication methods, effective questioning skills, and an ability to uniquely align support to individual teacher personalities, styles, and needs. Teachers will feel empowered by these coaches. Instructional coaches, likewise, will lead practices such as classroom observations, observation feedback, and professional learning communities.

*Teacher Empowerment:* Teachers at AAI will not only have the power to make instructional decisions within their classrooms to best meet individual student needs; they also will be included in collaborative decision-making on topics such as scheduling, materials selection, and professional development experiences. Teachers may also adopt differentiated roles and serve as department supervisors or mentors for less experienced teachers. This sense of involvement will ensure teachers feel empowered to contribute input in valuable ways.

*Professional Development:* AAI will engage teachers in determining the structure and content of professional development. The school will provide teachers with ongoing support in curriculum, instructional methods, classroom and behavioral management, special education support and accommodations, as well as other relevant topics essential to school success. AAI will also provide up to 10 days of intensive professional development for teachers for up to 10 days prior to opening. In pre-opening, teachers will receive training in the following areas: Three pillars (mission/vision, Prepared Mind, Healthy Body, Performance Character), instructional methods (project-based learning, active student-centered learning, cooperative learning, technology incorporation, differentiated instruction, backwards-design, unit design), and operational expectations (classroom management, discipline procedures, lunch room/playground duties, emergency plan, and technology). This training will be collaboratively provided by school leadership, instructional coaches, and Athlos Academies (ESP). Additionally, several full days will be set aside for professional development throughout the school year. Athlos Academies (ESP) will provide virtual and on-site professional development during these times. These days will consist of topics based on need, teacher interest, and best practices. Weekly data-driven after-school meetings will allow teachers the opportunity to discuss student achievement and plan differentiated instruction or interventions. Additional grade-level common planning time will also allow for subject or grade-level curriculum collaboration.



The teacher retention efforts above, including strong leadership, instructional coaching, and professional development, outline many aspects of the relationship between the school leader and the rest of the staff.

The teacher-student ratio, as outlined in the budget, is 24:1 across all grade levels in year 1. AAI will work within the parameters of legal requirements and ICSB accountability requirements to adjust student enrollment or ratios as needed to provide the best success for students. The ratio of total adults to students will be approximately 16.5:1.

## Evaluation of School Leadership

### Professional Responsibilities

1. Manages human capital
2. Self-reflection and professional growth
3. Professional obligations
4. Family and community engagement

There are three components of the model: 1) professional performance, 2) school performance, and 3) stakeholder input. These three components are weighted at 50 percent, 30 percent, and 20 percent of the performance rating, respectively.

In the evaluation model, the administrator engages in a continuous annual review process, as outlined below:

### Performance Level Ratings and Expectations

An administrator receives a summative evaluation at the end of each year. The summative evaluation includes feedback for further growth and development and a final performance rating determined by the process found on page 15. The following performance ratings are used for the final performance rating:

- 3 - Highly effective
- 2 - Effective
- 1 - Marginally effective
- 0 – Not effective

An administrator with a final summative performance rating of “marginally effective” should be supported to improve through targeted professional development opportunities and through the setting of appropriate professional growth plan goals. An administrator with final summative performance rating of “not effective” must be supported through an improvement process or dismissed.

### Developing Performance Rating

AAI will utilize similar processes to determine school leadership ratings including observations, self-assessments, and a professional growth plan.

### School Performance Goals

Administrators at AAI will engage in annual goal-setting for school performance. This process involves identifying targets to assess, selecting appropriate local or state-level assessments, identifying baseline levels from which to measure growth, and monitoring progress over the course of the year. The objectives can be set to incorporate both growth and overall performance goals. In addition, the administrator will set goals on important school climate factors such as discipline and attendance rates.

### Stakeholder Input

AAI conducts an annual stakeholder survey. Administrators are expected to receive positive feedback from parents, students, and teachers. In addition, administrators are expected to use data from the stakeholder input survey to improve practice.

### Summative Evaluation

At the end of each year, the summative evaluator conducts a summative evaluation that takes into account professional performance, school performance, and stakeholder input. The professional performance dimension is determined using evidence from summative observations, formative and informal observations, progress in the professional growth plan, and additional administrator documentation.

### Reviewing School Performance Goals

School performance goals will be reviewed by a summative evaluator prior to the initial conference and collaboratively revised, if necessary, between the summative evaluator and the administrator. Progress on the school performance goals will be discussed quarterly.

The purpose of the quarterly conference is to add context to the administrator’s observed performance and to enhance discussion of strengths and areas for improvement as they pertain to school performance. The quarterly conference also allows the supervisor/evaluator to get to know the administrator’s methods of monitoring and assessing student progress and will help to support the administrator in efforts to promote school achievement.

Finally, the quarterly conference allows the administrator to show evidence that growth targets need to be adjusted or revised. They will make every effort to support the administrator in these conversations. The evidence and data brought forward should be discussed until mutual understanding is reached.

<b>Does Not Meet (0)</b>	<b>Partially Meets (1)</b>	<b>Meets (2)</b>	<b>Exceeds (3)</b>
Based on benchmark data, school performance on the goal was worse than expected.	Based on benchmark data, school performance on the goal was partially as expected.	Based on benchmark data, school performance on the goal was as expected.	Based on benchmark data, school performance on the goal was better than expected.

### Evaluation of Teachers

AAI has adopted a modified version of the RISE Evaluation and Development System: Evaluator and Teacher Handbook Version 2.0 by the Indiana Department of Education. The evaluation tool uses peer and supervisor observations and evaluations of professional performance, student growth measures, and stakeholder input to evaluate teachers’ performance on the two main components of professional

practice and student learning. Each teacher at AAI will receive a rating at the end of the school year in one of four performance levels:

- Highly effective
- Effective
- Improvement necessary
- Ineffective

A teacher receives a summative evaluation at the end of each year. The summative evaluation includes feedback for further growth and development and a final performance rating determined by the process found on page 20. The following performance ratings are used for the final performance rating:

- 3 - Highly effective
- 2 - Effective
- 1 - Marginally effective
- 1 - Emerging effective (used only for probationary teachers)
- 0 – Not effective

A teacher with a final summative performance rating of “marginally effective” should be supported to improve through targeted professional development opportunities and through the setting of appropriate professional growth plan goals. A teacher with final summative performance rating of “not effective” must be supported through the teacher improvement process (TIP) on page 21 or dismissed.

#### Observations

Observations are planned or impromptu opportunities for a summative evaluator or a peer reviewer to gather evidence for evaluation and to provide feedback to a teacher for growth and development. Summative observations are those conducted by a summative evaluator. These may be announced or unannounced and must occur at least once per semester. These summative observations should be supplemented by formative or impromptu observations by the summative evaluator as well as peer observations. Formative evaluations may occur inside or outside of the classroom. All observations that are to be used as a part of a teacher’s summative evaluation must be documented within two weeks of the observation. Summative and peer evaluations are to be debriefed with the observed teacher within three weeks of the observation. At this conference, any documentation of the observation must be shared with the observed teacher.

#### Peer Observations

Twice per year, a teacher will be observed by an experienced peer, preferably in a similar content area. Peer reviewers should be teachers rated effective or highly effective in the prior year. Prior to a peer review, the two teachers involved should meet to discuss areas of focus. The peer reviewer should provide feedback tailored to the issues discussed at this pre-observation conference, in addition to any other meaningful observations. These observations should be documented and debriefed as described above.

#### Self-Assessment

Each summer, teachers complete a rubric as a self-assessment. Self-assessment should be based on a teacher’s thoughtful reflection of their performance in prior years, rather than as a goal for the upcoming year. The results of the self-assessment should represent current performance levels and should be informed by the prior years’ summative evaluation, if available.

### Professional Growth Plan

The professional growth plan is a way for a teacher to set and pursue professional growth goals and plan connected learning activities as part of the annual review cycle. The professional growth plan is intended to:

- Guide individual learning activities throughout the year;
- Empower a teacher to plan his/her own individual professional learning; and
- Ensure that each teacher is making adequate yearly progress toward license renewal.

The professional growth plan is developed at the beginning of each year following the teacher self-assessment and is reviewed at the initial yearly conference with the summative evaluator. Prior to the summative evaluation, a teacher submits a summary of professional growth activities for the year to the summative evaluator.

### Determining Component Rating

To determine a component rating for the teacher practice component, the summative evaluator will collect all evidence from the year including:

- The documentation from observations conducted by the summative evaluator;
- The teacher's self-assessment;
- The teacher's professional growth activities;
- The peer reviewer's observation documentation and;
- Supplemental materials submitted by the teacher.

The assigned summative evaluator reviews the body of evidence for the professional performance component of the model. The evaluator looks for patterns in performance and trends over time and compares evidence to the educator effectiveness tool. The evaluator interprets the evidence within the context of these benchmarks to draw conclusions about performance. An overall score for professional performance is given on a 0-3 scale, using the rubric and the performance levels below.

3 – Highly effective

2 – Effective

1 – Marginally/emerging effective

0 – Not effective

### Unsatisfactory Performance and Character

AAI holds each of its employees to certain work rules and standards of conduct. When an employee deviates from these rules and standards, AAI expects the school administration to take corrective action.

Corrective action is progressive. That is, the action taken in response to a rule infraction or violation of standards typically follows a pattern of increasing in seriousness until the infraction or violation is corrected or the employee agreement is terminated.

The usual sequence of corrective actions includes an oral warning and coaching towards better performance, a written warning, mentorship, probation, suspension without pay and/or termination of employment. In deciding which initial corrective action would be appropriate the administration will consider the seriousness of the infraction, the circumstances surrounding the infraction, and the employee's previous record. The delineation of the usual sequence noted above does not preclude the administration or the board from implementing or utilizing a different corrective action process should the conditions warrant such a need.

Though committed to a progressive approach to corrective action, AAI considers some rule infractions and violations of standards as grounds for immediate termination of employment. These include but are not limited to: theft in any form, insubordinate behavior, creating inappropriate situations with colleagues or students, vandalism or destruction of school property, the use of school equipment and/or school vehicles without prior authorization, untruthfulness about work history, skills, or training, divulging school business practices or other sensitive information, undermining of school decisions, practices, or policies, and misrepresentations of AAI to a student, parent, a prospective student/parent, the general public, and/or another employee.

### Compensation

Salaries will be based on expectations of salaries offered within the surrounding township school districts. AAI will allocate no less than \$600 per employee per month for medical benefits. In addition, the school will offer life insurance and unemployment insurance benefits. The school will participate in the Indiana Public Retirement System (INPRS) and will allocate budget associated with the costs of providing that benefit to AAI employees.

AAI is committed to providing an attractive compensation package for employees. The school leader and board will evaluate all compensation options. As the school moves into a more sustainable operating position, there may be performance pay or other incentives for teachers and staff.

### Professional Development

The Athlos model is supported by curriculum, instructional strategies, and assessment practices that require teachers to master specialized content pedagogy. Teachers will also build communities and positive school culture for their classrooms, the staff, the whole school, and students' families. Understanding that a new organizational system will be developed and that both leaders and teachers will bring varied experiences and skills, the staff at AAI will participate in a strategic professional development plan supported by Athlos Academies (ESP). Curriculum, resources, and strategies alone will not result in effective implementation of the model; quality and well-scaffolded professional development is an important component of the model. The plan outlines training topics for the leadership team, instructional coaches, and the staff which will begin prior to the start of each school year and continue during the school year through onsite visits and virtual meetings. Athlos Academies (ESP) will work with coaches in the implementation of the model as they develop coaching cycles, guide PLCs, and offer observational feedback.

Athlos Academies (ESP) has a professional development plan that outlines the professional development that will be offered to the staff of AAI. In addition to training, Athlos Academies (ESP) will work with leaders and coaches to develop a professional development resource library available for teachers. Selected resources will support model implementation. The school leadership team, in conjunction with the ESP, will plan onsite and continuous virtual professional development. Resources will include use of the learning management system (LMS), Athlos Academies' (ESP) online learning platform, Athlos Summer Institute training, and opportunities with outside professional organizations. Ongoing professional learning communities (PLCs) will also support collaboration and further development.

The Athlos Summer Institute is an annual professional development training offered every year that is open to school leadership, teaching staff, and board members that takes place in Boise, Idaho at Athlos Academies (ESP) headquarters. The Athlos Summer Institute is an immersion into the Athlos model designed for Athlos teachers, leaders, and partners. Participants will gain powerful insights connected to the implementation of the innovative Athlos approach. In addition to networking with experts in the field, participants will benefit from strategies to support and impact quality teaching and governing. All participants will walk away with new professional learning and tools to build stronger, more dynamic school communities.

Professional learning communities (PLCs) are groups of teachers coming together to better the school, district, network, or even the field of education as a whole. In the context of Athlos, PLCs serve as the catalyst for professional development among teachers. Teachers will take a course on the LMS on PLCs that takes teachers through resources and learning about different facets of the Athlos model. The foundation to effective PLCs is a growth mindset. Without growth mindset, the success of a PLC will be limited. A second underpinning of effective PLCs is collaboration. Collaboration across classrooms, grades, subject areas, and the three pillars creates a dialogue important to the health of school culture as well as the professional development among those involved. Student success must be the underlying focus of all PLCs. Members of an effective PLC should be able to objectively reflect on current practices and set goals through the lens of what is best for students. Time is a limiting factor in any school. To be useful, PLCs must be scheduled, organized, and facilitated in a way that honors staff members' time and focuses on topics that are important to those involved.

The LMS is another tool for professional development available to coaches and school leaders. Athlos Academies (ESP) has curated quality resources and developed online courses on the LMS that are aligned to the structures and strategies for all three pillars. Athlos Academies (ESP) will work with coaches in effectively utilizing this LMS with the staff.

#### *Professional Development Schedule*

The professional development plan includes a framework of ongoing support that will be provided to school leadership and staff throughout the year. Athlos Academies (ESP) staff, the school leader, and instructional coaches will all lead professional development. Teachers will have regular time throughout the school day, when students are not in the classroom, for professional development that will include staff-level meetings and professional learning community sessions. Additional meetings will occur occasionally after the school day ends, as needed. Below is a sample schedule for professional development and how trainings will be implemented for staff to ensure success for the school.

Spring/Summer Leadership Training Topics			
School Leader(s)	Leadership Team	Instructional Coaches & Lead Athletic Performance Coach	Front Office/ Support Staff
New Employee Paperwork/Logistics; Orientation Manual on Canvas			
Introduction to Athlos: Mission, Vision, History			
Roles/Responsibilities of H.C. & Roles/Responsibilities at the School			
Technology: Office 365, Canvas, PowerSchool,			
Staff Recruitment & Hiring			
Calendars and Scheduling			
Work Plan Overview and Expectations			
Growth Mindset: Culture & Community			
Policies, Procedures, & Protocols			
Charter Goals Overview		N/A	
Board Reports & Subcommittees		N/A	
Facility Rental Agreement		N/A	
PTA/PTO		N/A	
FERPA/Student Access to Internet		N/A	
ExtraCurriculars		N/A	
Copy Machines/Office Supplies			
Brand Guide			
Media Relations			
Introduction to the Pillars: Overview of Pillar Implementation Guide, Pillar Rollout Plan			N/A
Finance role, purchasing, invoicing, back office relationships, grants/grant process, payroll	Purchasing, invoicing, grants/grant process		Finance role, purchasing, invoicing, back office relationships, grants/grant process, payroll
PowerSchool: Enrollment Process, new hire process, state reporting		PowerSchool & PowerTeacher: What teachers need to know	PowerSchool: Enrollment Process, new hire process, state reporting
Leadership Skills and Team-Building			
Managing Conflict (with families, students, staff, etc.)			
Overview of School-Wide Structures			

*Pre-Opening Professional Development Schedule*

The professional development plan is developed with Athlos Academies (ESP) staff and presented to the local board for approval. The professional development plan is a sample plan with the ESP, but this will change and develop to fit the needs of AAI upon approval.

The training topics that take place before opening in the spring/summer include: introduction to Athlos: mission, vision, history; growth mindset: culture and community; and introduction to the pillars: overview of pillar implementation guide. Athlos Academies (ESP) staff will provide multiple days of on-site and virtual training prior to opening to help with professional development. Below is an example of a schedule the leadership team would create with Athlos Academies (ESP) for the training days for staff and what each day of training would look like.

On-Site Teacher Training Days (Year One)											
Day:	Day 1	Day 2	Day 3	Day 4	Day 5	Day 6	Day 7	Day 8	Day 9	Day 10	Day 11
<b>Facilitated By:</b>	Athlos school operations team	Athlos school operations team with school leadership team	Athlos Pillar Team	Athlos school success & pillar teams	School Leadership Team	Athlos Pillar Team	Athlos Pillar Team	Athlos Pillar Team	School Leadership Team	School Leadership Team	School Leadership Team
<b>Morning Huddle/Team-Building</b>											
<b>Morning Session 1</b>	Logistics Part 1: Welcome to Athlos: Intro to Athlos, Overview of next two weeks, New hire paperwork; Overview of tools/resources; Where to find policies and handbooks	Logistics Part 2: Q&A; Purchasing processes; Substitutes and time off; Technology check	Intro to the Athlos model: Pillar implementation Guide and School Wide Structures	PowerSchool: attendance, lunch alerts,	MTSS, Sped, and ELL - Case Load. specific review of accommodations and who are your kids.	Bridges Math training/ Coaches on the turf	Balanced Literacy Overview/ Lucy Calkins/ Coaches on the turf	Whole Staff intro to Athlos Athletic Curriculum	PLCs: Expectations, schedule	Teacher Work Time with Floating School Staff Support	Teacher Work Time with Floating School Staff Support
<b>Movement Break</b>											
<b>Morning Session 2</b>	School Calendar and Daily Schedule Review. What extra duties to expect?	School Safety: Arrival and Dismissal; Duties Assignments	School/classroom culture: PBIS, Management in the Active Classroom	Continue Structures and Strategies Overview - Standards Based Grading Guide	State mandated trainings: mandatory reporting, bullying and suicide prevention trainings	Bridges Math training/ Coaches on the turf	Reading: K-2 - foundational literacy; 3-5 - reading/ Coaches on the turf	Staff Turf Experience	Teacher Work Time with Floating School Staff Support	Teacher Work Time with Floating School Staff Support	Teacher Work Time with Floating School Staff Support
<b>Lunch</b>											
<b>Afternoon Session 1</b>	Employee payroll, benefits	School Safety: Emergency Plan Training with practice	School Culture: school procedural expectations, duties assignments, daily protocols; develop class schedule (playground, lunch, hallways..)	PowerTeacher Grade Book, Report Cards, Standards-Based Grading Practical Implementation	School Assessment Plan: awareness of tools used, schedule	Bridges Math training/ Coaches on the turf	Spaces and Places Classroom Walk Through	Science and Social Studies Overview and Teacher Planning Time	Afternoon: Kick off team building experience	Afternoon: Kick off team building experience	Afternoon: Kick off team building experience
<b>Movement Break</b>											
<b>Afternoon Session 2</b>	Classroom Part: provided supplies list, overview of curriculum, overview of suggested classroom set up	Plan Back to School Night. (what happens in your classroom, what happens in common spaces, documents to print/online access, map and coordinating volunteers presentation.	Morning Huddles; First two weeks	Report Card Domains, State Standards Review, Begin Unit Mapping	Communication Plan: Expectations; Set up classroom webpages	Teacher Planning Time with Instructional Coaches.	DINNER BREAK	Teacher Planning Time with Instructional Coaches.	Teacher Planning Time with Instructional Coaches.	Teacher Planning Time with Instructional Coaches.	Teacher Planning Time with Instructional Coaches.
<b>Focused Teacher Work Time</b>	Explore materials from today's sessions (i.e. employee handbook, family handbook, finish new hire paperwork,	Set up your safety materials. Make sure all of your technology is working. Explore Canvas.	Develop classroom management plan, Plan first week of morning huddles	Continue standards review and curriculum mapping	Teacher Planning Time-first 2 weeks of building classroom culture	Set up Number Corner, plan first weeks of math lessons	Back to School Night	Teacher Planning Time with Instructional Coaches	Teachers' Choice	Teachers' Choice	Teachers' Choice

*Professional Development and Student Achievement*

The following is an example of professional development topics supporting healthy, balanced assessment practices that Athlos Academies (ESP) has incorporated into an implementation plan. The example shows how the faculty will support AAI's educational model to assess students and improve student achievement.

Assessment planning

- Backwards-design process is used to plan assessments and lay out questions and learning activities to guide learning



- Learning targets deconstruct standards and develop appropriate targets (knowledge, reasoning, skill, product, disposition)
- Formative assessments of diverse types will be used to modify and differentiate instruction
- Summative assessments will happen in several forms: selected response, performance-based, written response, personal communication
- Norman Webb's depth of knowledge (DOK) analysis of items and tasks used in summative assessments
- Standards-based grading system (philosophy, alignment to standards and assessments, tracking, recording, communicating, report cards)
- Student-engaged assessment practices (i.e. student-led conferences, Performance Character showcase, student work exhibitions, student portfolios, reflection on targets, goal setting, collaborative assessments)

#### *Start-up and Operations*

Start-up plan: See Attachment 16.

#### *Transportation*

AAI will be located in Southeastern Marion County and will have its facility close to four surrounding townships. It will be centrally located so families can easily transport their children to and from school. In addition, families can also work to arrange transportation through carpool. The school will use its school safety plan to ensure families can safely transport their children to AAI.

#### *McKinney-Vento Homeless Assistance Act Compliance*

AAI will comply with the McKinney-Vento Homeless Assistance Act of 2001. Homeless and migrant students are entitled to immediate enrollment and full participation, even if they are unable to produce records required for enrollment, which may include medical records, birth certificate, school records, and proof of residency.

To properly identify homeless, migrant, or emancipated students, a school administrator or educator first must determine the residence of a student, which involves considerations including:

- The place, however temporary, where the child actually sleeps,
- The place where a homeless or migrant child or his or her family keeps their belongings, or
- The place that a homeless or migrant child or his or her parent/guardian(s) considers to be home.

The determination of student's residence or place a student considers to be a permanent home will not be based upon:

- Rent or lease receipts for an apartment or home,
- The existence or absence of a permanent address, or
- A required length of residence in a given location.

AAI will follow these protocols to meet students' needs:

- Within one day of admitting a homeless student, a school counselor or another employee designated by the administration as the homeless liaison shall be notified and contact shall be made with the appropriate officials.

- If there is a dispute concerning residence or the status of an emancipated minor or homeless child, the issue may be referred to the Indiana Department of Education for resolution.
- Homeless students will be eligible for programs for gifted and talented students and school nutrition programs as well as any other educational services for which the student meets eligibility criteria.
- Homeless and migrant children are entitled to receive transportation and other services available to non-homeless students. Upon request of a parent/guardian(s) and evaluation of the best interest of the child, transportation may be provided to and from school in accordance with Indiana law and what is reasonable. The leadership team will work with parent/guardian(s) to ensure those students get to school safely every day.
- Homeless students are permitted to continue attending AAI, to the extent reasonable, unless it is against the wishes of their parent/guardian(s), and be permitted to remain at the school for the duration of the homelessness until the students move into permanent housing.
- AAI will continue efforts to assist homeless students in completing necessary and important records, including immunization records.
- AAI's dress code and uniform policy will not delay enrollment for homeless or migrant students.

### *School Safety and Security*

A safety committee will be formed to assist with developing the school safety plan. This committee will consist of the school leader, parents, and will partner with local emergency management facilities. The safety committee will begin meeting in the spring of the school's first year of operations. They will analyze the overall practices of the school, make recommendations for improvement, and revise school policy.

Keeping the children of AAI safe is a primary duty. Athlos schools implement several safety measures, including:

- A safe walking/biking plan
- A visitor background check program (Raptor)
- Facilities safety measures
- A safe drop-off and dismissal plan for drivers and students (Driveline)
- A comprehensive school safety plan (School Safety Plan)

The school leader works diligently with Athlos Academies (ESP), community volunteers, and city officials to ensure each of these safety measures are well-designed and work together with the safety committee.

While the school leader will take care of the first four bullet points, the comprehensive school safety plan, sometimes called a crisis management plan, is best developed with a team. Below is a sample of a safety plan that would be implemented at AAI.

### *Understand Your Role*

As many teams are involved with the development of this plan, let's review the roles each team plays in the big picture.

- Community volunteer team - Their role is to complete nine exercises that make this plan specific to the school and the community. These details are the core of the plan.

- Athlos school operations team - This team, based in Boise, has developed a process to guide the community volunteer team to a high-quality final product. This team's role is to prepare a draft and final copies of AAI's plan based on the work the safety committee did in the exercises.
- Emergency responders - Once the plan is drafted, your team will invite members of your local emergency responders (firefighters or police officers or EMTs, etc.) to review and give final feedback on the plan.
- Incident command team - This is a school-based team with specific roles and responsibilities for leading the school's actions in the event of an emergency. Assigning specific names to each defined role is one of the exercises the community volunteer team will complete.
- Governing board - The school's governing board ultimately needs to adopt the plan. The governing board is bound by the regulations of open meetings law, and will need this plan on their meeting agenda as an action item no later than their regularly scheduled July meeting.
- Administrative team – AAI's administrative team is tasked with overseeing that the development of the safety plan stays on schedule and that teachers are trained, families are informed, and students practice. This team is also responsible for reviewing the plan each year.

### *Review the Sections of the Plan*

The school safety plan defines various hazards and threats that might occur at the school and outlines what to do if such events actually happen. It summarizes the role that each type of person in the school community plays in preparing for, getting through, and recovering from any emergencies that might occur. It also outlines a clearly defined chain of command including emergency responders in the event of a crisis.

The basic sections of the school safety plan include:

#### *Section I. Office Staff Tools*

Includes the emergency drill tracking form, emergency contact information sheet, etc.

#### *Section II. School Safety Plan*

Includes the roles and responsibilities sheet, the warning and communication plan, training assignments, etc. This section of the plan considers how warnings about emergencies might be received by the school, how that information will travel throughout the school, and how communications are delivered to emergency responders, communities, and families. It also considers how training and practicing will take place.

#### *Section III. Recovery and Resources*

Includes the emergency recovery plan, handouts for families about how children process grief, training materials for teachers to help them look for signs of students who may need counseling services, etc.

#### *Section IV. Action Plans*

While we can prepare for the most common threats and hazards, we cannot predict every emergency. For that reason, this section highlights the five basic action plans that teachers and students need to practice. The action plans are:

1. Active intruder
2. Fire evacuation
3. Lockdown
4. Shelter in place
5. Family reunification

These five action plans are the basic elements of each of the threats and hazards protocols (described below). Knowing these five action plans will prepare teachers for an unpredictable emergency in which he/she may have to use professional discretion to navigate an emergency with the greatest degree of safety.

#### *Section V. Threats and Hazards Protocols*

These protocols consider the most common emergencies and establish a plan that outlines an order of action specific to that threat. Threats and hazards are divided into four categories:

1. Natural
2. Technological
3. Biological
4. Human-caused

This part of the plan considers a before, during, and after aspect of the most likely emergency scenarios in each of these four categories. These protocols reference the five action plans.

For example, a protocol for an earthquake may include the shelter in place action plan followed by the fire evacuation action plan, and may have a few steps specific to earthquakes in between.

[Technology Specifications and Requirements](#). Not applicable.

[Insurance Coverage](#): see Attachment 17.

## Facility Plan

### *Location/Facility*

Athlos Academy of Indiana (AAI) will contract with Athlos Academies (ESP) to obtain school facilities with a lease-to-purchase option. The board of AAI has been impressed with the facility financing and development work of Athlos Academies (ESP) through their due diligence research. A high-quality facility strengthens a positive school culture and gives families a certain level of confidence for how their children will be educated. For the school to deliver on its charter promises, a high-quality facility is a priority.

Athlos Academies (ESP) has been chosen to assist with facilities development because the ESP specializes in providing responsible financing and facilities acquisition to top-tier charter schools. The board will negotiate any construction or leasing contracts with Athlos Academies (ESP) at arm's length and will seek professional advice in the process. The proposed lease structure will provide affordable lease payments and a purchase option that will be favorable to Athlos Academy of Indiana. This intended structure allows our school to exercise its purchase option and refinance the facilities through either traditional financing or bond issuance. Athlos Academies (ESP) is currently locating a suitable property in Southeastern Marion County. They will purchase the property and construct a purpose-built school facility.

Upon construction completion, Athlos Academy of Indiana will take possession of the building and will lease the facility with the aforementioned purchase option. No pre-operational funding will be required for site selection, construction, fixturing, or financing. Financing is generally provided by Athlos Academies (ESP) and/or leveraged through its relationships with financial partners. This will provide AAI with access to affordable, responsible financing. The Athlos Academies (ESP) facility model has been

previously vetted by independent financial advisors, legal counsel and bond counsel for other charter schools, and the board is informed that the model is an effective, viable, and affordable option to provide a start-up charter school and students with school facilities pending the ability to secure either traditional financing or issue bonds. The governing board of AAI is aware of the charter school loan program that may be available to them which would provide another financing option. It will be up to the governing board and Athlos Academies (ESP) to work through financing options for the most responsible path for the entity upon charter approval.

Athlos Academies (ESP) has an in-house site selection specialist that has access to sophisticated demographic software that assists the board in locating the school in the optimal location. From here, the site selection specialist is scouring the area for potential sites, using many tools including real estate databases, site visits with local agents and developers, and other electronic means. Cost, zoning, traffic, and site remediation concerns are also factored into the analysis. Once a site is identified as fitting the overall requirements of the school, high-level negotiations with the seller commence.

The total facility cost that the financial model can handle at full scale is approximately \$21.5 million. With any contingency plans considered for a smaller scale opening, facility costs and lease rate would be adjusted to scale down with the total enrollment number. The practice of Athlos Academies (ESP) for the life of the organization has been to provide fiscally viable facility solutions for all school partners. To date, nearly every facility partnership has been able to buy back the building for the local governing board to own within the three to five year suggested window – in many cases, this time frame has been less than three years. In the case of Athlos Academy of Indiana, the back office services for financial management of the school provided by the ESP will ensure that this option can be exercised in a timely and responsible manner.

## Budget and Finance

### *Systems and Procedures*

AAI will issue financial information in accordance with standards promulgated by Financial Accounting Standards Board (FASB) and Governmental Accounting Standards Board (GASB), as well as requirements specific to the state of Indiana. The school's financial accounting and financial statements will be in accordance with Generally Accepted Accounting Principles (GAAP).

AAI intends to contract out its financial accounting and human resources services to Athlos Academies (ESP). Athlos Academies (ESP) has extensive experience in providing financial services to charter schools across the country. In addition to assisting with budget and audit preparations, Athlos Academies (ESP) will support and manage AAI's finances through complete accounting and financial function, payroll, and human resources management.

### *Purchasing and Accounts Payable*

AAI's procurement and account payables process will be in alignment with Indiana purchasing rules, as well as best practices for procurement and internal controls. The school will utilize Indiana procurements where possible and applicable in the design and implementation of its purchasing policies.

AAI will utilize a procurement process that will include requests for purchase (requisitions) that require approval from appropriate directors, the school business manager (employee of the ESP who works on

site), and the school leader, before a purchase is deemed approved and appropriate. A review and comparison of each expense to ensure compliance with Indiana and federal (if applicable) standards will be performed to ensure the expense is allowable. Additionally, comparisons with budget, as well as operational and strategic goals, will be done to ensure that the expense is within the plans and goals of the school before being incurred.

The school will issue a purchase order and incur the costs as outlined in the request. Internal control processes will include a second review of the invoice upon receipt and comparison with the purchase order in addition to confirming receipt of the product. Upon approval of all supporting documentation, a disbursement will be prepared and signed by the school leader. Disbursements over a pre-determined threshold will require a second signature or written approval from the board finance committee chair before disbursement.

#### *Payroll and Hiring*

AAI will process payroll in compliance with federal and Indiana state rules applicable to labor management and payroll processing. The school intends to utilize a third-party processor, such as ADP, to assist with the payroll processing, disbursement of payroll, and preparation of federal and state returns. ADP is a nationwide payroll processor with experience servicing all forms and sizes of business entities and assisting with payroll processing and human resource management.

AAI will maintain compliance with federal and state hiring practices, including requiring I-9's and W-4's before allowing employment, as well as ensuring all employees receive background checks. The school hiring process will contain a thorough vetting of the employee's experience and how they will fit with the Athlos model and educational program. All hiring decisions will be made by the school leader, with the business manager ensuring hires are within budgeted resources. The school will provide a competitive insurance benefit package that ensures that it can hire and retain qualified personnel that will ensure educational success for AAI students.

#### *Accounting Transactions*

Throughout the fiscal year, the school's contract accounting services provider will be working with the financial statements and financial transactions. The school will ensure that the contract service provider is qualified and able to support financial services for AAI that will meet the needs of the board and the ICSB. The school will ensure that the accounting service provider is appropriately educated and has the proper credentials (CPA) to ensure the financial stability and success of the school.

The AAI board will be provided monthly financial statements, including a budget to actual and statement of net assets. In addition, they will be provided a copy of the check register and a cash flow statement. This information is the culmination of the financial transactions in the given month and will ensure that an appropriate review of those transactions occur.

#### *Financial Management and Internal Control Review*

AAI will have an internal control environment that ensures the school issues accurate and complete financial information. The school will have internal control processes in place that share duties between both the school and the business services contractor, ensuring that a review of transactions occurs. Proper segregation of duties will occur both within the school, as well as within the accounting contractor and across each transaction affecting the school. This separation of duties will be an instrumental component of the school's fiscal operations.

Financial reviews will be provided by the business manager, school leader, and the board of AAI. As discussed above, the board will receive a monthly financial packet that will include a complete set of financial statements, as well as a listing of cash disbursements. The school will also hold monthly board finance committee meetings which will allow board members the opportunity to dive deeper into the financial position of the school and walk through the transactions that affect the school's fiscal position in each month.

#### *Audit*

The school will have an annual audit completed by an independent public accounting firm qualified to provide such services. The audit will ensure that the financial statements adhere to standards required under GAAP, as well as governmental accounting standards and state rules and regulations. The board will be provided a copy of the audit and any management letter comments, as well as a separate presentation by firm staff. AAI will deeply value the interaction between the board and the auditor and ensure that open lines of communication exist between both parties.

#### *Budget*

AAI will have an open and collaborative budget process that ensures multiple layers of feedback within the process. The process will begin in early spring by reviewing the current financial position of the school and the budget. The business manager, in conjunction with the school leader, will set enrollment targets by grade level and work through revenue projections. Parallel to this process, the school leader and business manager will also work with school staff at multiple levels to ascertain what the expenditure needs are for the following fiscal year. Once those have been vetted at the different levels within the organization, they will be compared to available revenues and a final budget is completed. Once prepared, the budget will be provided to the finance committee and board for an initial review or first reading, with the final budget approved via a second reading. Once approved by the board, the budget will be disseminated to the directors within the school so they can prepare for the upcoming academic year.

[5-Year Pro-Forma Budget](#). See Attachment 18.

[Budget Narrative](#). See Attachment 19.

## Section IV: Portfolio Review and Performance Record

[Performance Portfolio](#). See Attachment 21.

### [Performance Examples from Athlos Academies \(ESP\) Network Schools](#)

A network school for Athlos Academies (ESP) that has a similar demographic to the targeted Indiana student population is Athlos Academy of St. Cloud (AASC). The school opened fall of 2016 and has proven a strong opening for a start-up charter school in their area. AASC scored within four and five points of the district in which it is situated in math and reading, respectively. Despite having a very challenging student population, the school was able to have a respectable first year. Based on interim assessments conducted throughout the year, student growth was particularly high in some untested areas, leading to optimism about future results. For example, first grade students grew at a rate of 1.5

grade levels in reading and 1.15 grade levels in math over the course of a year, according to the interim assessments. Additionally, students who attended AASC for the entire year grew at a higher rate than late entrants in both math and reading; the higher rates of growth among students attending all year speaks to the effectiveness of the program.

There were a few notable challenges facing AASC during its first year of operation. AASC opened with an unpredicted student population. The demographics of the surrounding three-mile radius did not predict the high percentage of Somali refugee students who would attend the school and continue to back-fill seats year-round. With the support of Athlos Academies (ESP), AASC was able to increase enrollment throughout the year and add support for the student population as the year progressed. For example, there was a significantly increased English language learner (ELL) population who needed more staffing support than was initially planned for. As a result, Athlos Academies (ESP) and the school leadership team has increased staffing support by adding an additional teacher and four additional paraprofessionals to serve the needs of their growing language learning population. Title III funds have also been utilized to increase this support by implementing the Sheltered Instructions Observation Protocol (SIOP) model and incorporating professional development for staff to increase the understanding of WIDA standards, SIOP components, and support staff on campus for their students labeled ELL. An important sign of success for a school is the willingness to use the formative and summative assessments, school-wide culture, and observational data throughout the year to plan effectively for continued growth and success. AASC has done a great job of doing just that and has prepared for a strong second year.

The primary causes of the school's success with a challenging first year start-up can be attributed to strong leadership, flexible shifts by the ESP to support the needs of the school in its community, and an increased initiative to develop the skills of the data inquiry team to utilize assessment data throughout the year. The data inquiry team works with the data analyst for the ESP to prepare data to be meaningful and useable for staff. This information is discussed and presented during PLC meetings and staff meetings on campus to inform instruction, organizational or operational needs/changes, and to plan for continued milestones for student achievement and growth to be achieved. As a result of the work of this team with the ESP, AASC is able to evidence strengths and weaknesses throughout the school year to improve the experience and performance of students and families.

An example of a network school with similar demographics to the Indiana student population anticipated to be served that has unsatisfactory performance data is Athlos Academy of Utah (AAU). As a start-up school that opened with full enrollment, there was great intention throughout the school year to identify key contributors to any low performance data. As a result, AAU has identified the following three areas of concern for this coming 2017-2018 school year as a priority to address: chronic absenteeism, low-income early literacy, and science achievement.

First, the chronic absence rate at AAU was approximately 20 percent, nearly double national averages for an elementary school. Additionally, students who were chronically absent had a proficiency level approximately 12 points lower than those students who were not chronically absent. In fact, nearly the entire gap between AAU math scores and the state average can be explained by this gap between chronically absent and non-chronically absent students. The chronic absence rate likely is caused by a lack of parent understanding of the importance of daily attendance at the elementary level. In this



geographic area, the data shows that chronic absenteeism is a common cultural issue that needs to be addressed through intentional parent outreach.

In considering low-income early literacy, DIBELS scores were considered. While AAU's DIBELS scores only lacked the state average by a few points, students at AAU who receive free/reduced price lunch underperformed non-FRL students by approximately 30 points on DIBELS. This gap is substantially wider than is typical in the state of Utah. This is likely caused by the lack of reading practice at home which is a national issue. Again, with an increase in intentional parent outreach this issue may cause programs to be developed to support parents and families in participating in their child's literacy development beyond the classroom. By, providing more partnership opportunities for programming to support this demographic there may be increased performance.

Lastly, while AAU scored within four to eight points of the state average on math and English language art scores, it lagged state averages by approximately 15 points in science achievement. Leading into the start-up year, this subject area was the least prepared for by leadership and staff. The summer was spent addressing the development and needs associated with the science program on campus and will show significant changes in their second year of operation.

In the first year of a start-up school, it is common to see the gap between AAU and national averages cut in half for chronic absence rates with the goal of reaching national averages in three years. AAU also expects to see the gap between FRL and non-FRL students on the DIBELS assessment cut in half, with the goal of reaching a smaller than typical gap for the state in three years. Further, it is expected – with the changes in the science program for AAU – that the school will experience a median student growth percentile of at least 55 percent this coming year.

#### [Charter Contract Information for Athlos Academies \(ESP\)](#)

There are no charter schools in the network that have been terminated. There are no revocations, non-renewals, shortened or conditional renewals, or withdrawals of schools operated by the organization. There is no record of authorizer intervention with the network. As evidenced in Attachment 22, there is no litigation involving the network.

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## Attachment 1: Board Member Resumes

All Applicant Group resumes are on the following pages.

# ASHLEY GIBSON

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970 Fort Wayne Ave, Unit 207, Indianapolis, IN 46202  
Cell: 812-396-9414 • ash.gibs@gmail.com

## EDUCATION

**Indiana University Robert H. McKinney School of Law**, Indianapolis, IN

*Juris Doctor, May 2016; Certified Mediator*

**Activities and Societies:** Student Representative, Dean's Student Advisory, Board; Student Representative, BarBri; Member, Phi Alpha Delta International Law Fraternity—Hamill Chapter; Member, Women's Caucus

**Indiana University–Purdue University Indianapolis**, Indianapolis, IN

*Bachelor of Arts in Journalism and Public Relations, May 2008*

*Dean's List (Fall 2006, Spring 2007)*

**University of Southern Indiana**, Evansville, IN

*Dean's List (Fall 2005)*

## EXPERIENCE

**Director, Government Relations**

March 2016–Present

*The College Board, Chicago, IL*

Regional Director, based in Indianapolis, Indiana, working in four states advocating in support of public policy and other initiatives designed to enhance student access, participation, and performance in rigorous coursework. Through programs and services including the SAT Suite of Assessments and Advanced Placement (AP), the mission-driven nonprofit strives to work toward the promotion of student opportunity and success, and excellence and equity in education.

**Government Affairs Director**

Sept. 2014–March 2016

*Stand for Children Indiana, Indianapolis, IN*

Integral staff member of a non-partisan, student-focused education advocacy group. Responsible for researching, developing, and coordinating legislation and regulations that align with the organization's mission and values.

- Represent the organization in front of policymakers at the local and state levels
- Research and draft legislation, regulations, or policy papers that support Stand IN's annual impact planning agenda
- Establish and maintain excellent relationships with the governor's office, key legislators, state board of education members, local education leaders, and other stakeholders as needed
- Develop legislative strategies around education policy issues and prepare briefing materials to support the strategy outcomes
- Influence policy implementation at both the state and local level

**Deputy Legislative Director**

Jan. 2013–May 2014

*Office of Indiana Governor Mike Pence, Indianapolis, IN*

Key member of the Governor's legislative team, with extensive experience in lobbying, coalition building, and strategic planning at the state level. Represented the Governor before the state legislature, advocacy groups, and the general public.

- Pursued the realization of *Roadmap for Indiana*, the Governor's inaugural legislative agenda, which focused on promoting private sector job growth, the development of

world-class schools, protecting taxpayers, and supporting Hoosier families

- Managed the Legislative Assistant and was responsible for overseeing the state agencies' Legislative Directors and Liaisons
- Worked to protect the landmark education reforms enacted by the Indiana General Assembly in 2011, including a dramatic expansion of school choice options
- Continued to cultivate close working relationships with legislators and other vital interest groups to adopt and advance multiple pieces of legislation
- Coordinated major initiatives and strategies with other state agencies to ensure the enactment of legislation aligned to the Governor's policy goals and objectives

**Director of Legislative and Intragovernmental Affairs** April 2010–Jan. 2013  
*Office of State Superintendent Dr. Tony Bennett, Indiana Department of Education, Indianapolis, IN*  
Primary legislative liaison for the State Superintendent and Department of Education.  
Responsible for a wide range of interrelated activities involving state legislative relations

- Skillfully shepherded *Putting Students First*, the nation's most comprehensive education reform agenda, through the state legislature. The sweeping reform package embraced a broad range of issues: teacher evaluation and compensation, collective bargaining reform, school choice and competition, charter schools expansion, and school turnaround and accountability
- Managed direct reports, including legislative interns and Deputy Legislative Director

**Deputy Policy Director for Education** July 2009–April 2010  
*Office of Indiana Governor Mitch Daniels, Indianapolis, IN*  
Provided expertise to the administration in state legislative deliberations, diplomacy and interpersonal relations, coalition building, and lobbying.

**Governor's Fellow** July 2008–June 2009  
*Office of Indiana Governor Mitch Daniels, Indianapolis, IN*  
Selected as one of only seven statewide to participate in a year-long fellowship designed to give recent college graduates experience serving in state government.

## **HONORS & AWARDS**

Senator Richard G. Lugar *Excellence in Public Service Series Class of 2008-2009*  
M. William Lutholz Memorial Scholarship; IUPUI  
Creative Writing Scholarship; University of Southern Indiana

## **ACTIVITIES & INTERESTS**

*Member, The Policy Circle; 2016-Present*  
*Member, United Way of Central Indiana Public Policy Planning Committee; 2015-Present*  
*Ed Policy 101 Cohort Member, The Thomas B. Fordham Institute and 50CAN; 2015*  
*Mentor, Starfish Initiative; 2009-2013*  
*Volunteer, Special Olympics Indiana Polar Plunge After Splash Bash; 2008-2010*  
*Film Selection Committee, Indianapolis International Film Festival; 2012*  
*Board of Directors, Greater Indianapolis Republican Women's Club; 2010-2013*  
*Volunteer, My Man Mitch Governor's campaign and Dr. Tony Bennett for Indiana Superintendent of Public Instruction campaign; 2008-2013*

## **Elsie O. Owolo**

11615 College Avenue, Apt 21, Carmel, IN • elsie.owolo@gmail.com • 832-988-8827

### **Education**

**Rutgers University**, Newark, NJ, December 2016

Master of Public Administration, Public and Nonprofit Performance Management

**Yale University**, New Haven, Connecticut, June 2014

Certificate of Completion, Women's Campaign School

**Harlaxton College**, Grantham, United Kingdom, January 2004-May 2004

Study Abroad, British Politics and Literature

**Texas Woman's University**, Denton, TX, May 2006

Bachelor of Science in Legal Studies

### **Academic Honors**

- Phi Alpha Alpha Public Affairs and Public Administration Honor Society ▪ 2016
- Phi Sigma Alpha National Political Science Honor Society ▪ 2006
- National Society of Collegiate Scholars ▪ 2006
- Who's Who Among American College Students ▪ 2006
- National Dean's List ▪ 2006
- Gamma Beta Phi Honor Society ▪ 2004
- Golden Key International Honor Society ▪ 2004

### **Professional Certifications**

- Texas Standard Educator License Generalists 4-8
- Texas Standard Educator License ESL 4-8

### **Political, Advocacy, and Policy Experience**

#### **Teach Plus**

Indiana Policy Manager ▪ Indianapolis, IN ▪ January 2017-Present

- Created the policy focus, goals and strategy for the state of Indiana.
- Managed the Indiana State Policy Fellows, and Organizing and Advocacy Fellows programs including recruitment and selection of fellows, development of program content, program delivery, development of policy proposals, and engagement of alumni.
- Identified key leadership opportunities for the fellows including testimonies before the Indiana House and Senate, meetings with major policy makers, and advocacy work at the state level.
- Identified key media opportunities for the fellows including op-eds and interviews with reporters.
- Worked with various community partners, such as Stand for Children, Indianapolis Mayor Joe Hogsett, the Indiana Department of Education, and various members of the Indiana legislature to advance key education initiatives.

City Policy Manager ▪ Indianapolis, IN ▪ November 2016-January 2017

- Created the policy focus, goals and strategy for Indianapolis.
- Managed the Indianapolis Teaching Policy Fellows program including recruitment and selection of fellows, development of program content, program delivery, development of policy proposals, and engagement of alumni.
- Identified policy, leadership, and media opportunities for Teaching Policy Fellows.
- Created a broader community of reform-minded teachers by organizing a series of events or other engagement opportunities in service of Fellows' goals to inform and engage a critical mass of teacher voices to influence district policies.
- Established strong relationships and effective partnerships between Teach Plus, state education leaders, local districts and other local educational organizations.

#### **Education Pioneers**

California Charter School Association Advocacy Fellow ▪ San Francisco, CA ▪ June 2015-August 2015

- Selected from thousands of top graduate students and professionals for the Education Pioneers leadership development program.

- Completed high-impact project for the California Charter School Association and participated in leadership, networking, and education industry professional development.
- Created a comprehensive political asset map for engagement of elected board members in various districts/counties in the San Francisco/Bay area.
- Created a detailed project event plan and marketing plan for charter school enrollment fair for nine CMOs in the San Jose Charter School Consortium to be held in January 2015.

### **Organizing for America**

Alumni Trainer ▪ Houston, TX ▪ October 2013

- Delivered presentations on grassroots organizing and issues such as gun control, climate change, and immigration.
- Trained 100 volunteers on organizing topics such as One-on-One meetings, personal story telling, and basics of phone banking.

Deputy Political Organizer for President Barack Obama's Re-election Campaign Houston, TX ▪ October 2012

- Oversaw the day-to-day implementation of grassroots activities in support of President Obama's political campaign, including daily phone banking, recruitment of 65 volunteers, and day to day operation of the Obama campaign office.

### **Texas American Federation of Teachers**

Political Organizer ▪ Dallas, TX ▪ September 2010- November 2010

- Oversaw the day-to-day implementation of grassroots activities in support of the union's political programs, including daily phone banking of over 1,000 daily calls for all endorsed candidates for the Texas State House of Representatives.
- Provided daily and weekly political reports, including number of volunteers scheduled, number of dial attempts done through the phone bank, number of Identifications (IDs) for endorsed candidates of Texas AFT and local affiliates, and number of IDs and attempts from canvassing.
- Recruited over 85 volunteers from Texas AFT membership and increased the volunteer base by 95%.
- Oversaw the successful implementation of the Educator to Voter political mailings and Chase cards political mailings.

### **Congressman Tim Bishop**

Scheduler/ Internship Coordinator/Congressional Arts Competition Coordinator/ 2009 Inauguration Coordinator ▪ Washington, DC ▪ August 2008- August 2009

- Maintained the Congressman's daily, weekly, and monthly schedules as well as briefed the Congressman on scheduling activities.
- Evaluated and organized 50-100 incoming meeting, event, and speaking requests weekly.
- Per-screened, interviewed and hired 35-50 interns throughout the fall, spring, and summer.
- Facilitated internal and external events including but not limited to intern orientation, intern forums, on-campus recruitment, congressional hearing attendance and networking events.
- Pre-screened 50 applicants and selected the winner of the Congressional Arts competition.
- Developed a screening database for conducting the Presidential Inaugural ticket raffle which led to the distribution of over 300 tickets to district constituents.

### **Presidential Inaugural Committee**

Team Leader for Volunteers ▪ Washington, DC ▪ January 2009

- Responsible for the recruitment of 20 volunteers for the Inauguration speech.
- Conducted information and protocol meetings and conference calls with volunteers.

### **Congresswoman Laura A. Richardson**

Staff Assistant and Constituent Mail Manager/ Executive Assistant/ Internship and Fellowship Coordinator ▪ Washington, DC ▪ September 2007- August 2008

- Maintained over 2,000 constituent mail which included Internet Quorum and E-mail Management and the mass constituent mailings.
- Researched and composed policy statements on women's, military, and other issues pertinent to the Congresswoman's agenda.
- Pre-screened, interviewed, and hired 50-100 interns and fellows.

### **Mayor Laura Miller**

Intern for the Office of the Mayor ▪ Dallas, TX ▪ August 2006- December 2006

- Managed and responded to constituent request.
- Wrote mayoral proclamations and special recognitions.



- Inputted and monitored city service request.
- Served as a representative of the Mayor's office at key community events and meetings.

### **Congresswoman Eddie Bernice Johnson**

Campaign Worker and Congressional Office Intern ▪ Dallas, TX ▪ June 2005- August 2005

- Coordinated campaign recruitment efforts for volunteers.
- Developed outreach materials for the campaign office.
- Trained campaign volunteers.
- Assisted staff in constituent casework.
- Served as a representative of the Congresswoman's office at key community events.

### **British Parliament**

Intern ▪ London, U.K. ▪ January 2004- April 2004

- Rewarded with the Harlaxton College British Parliament Internship.
- Spent internship experience with Member of Parliament Quentin Davis.
- Created a portfolio that included internship and research experience.

### **Teaching and Leadership Experience**

#### **Houston Independent School District**

6<sup>th</sup>/ 7<sup>th</sup> Grade Pre- Advanced Placement Social Studies Teacher ▪ Houston, TX ▪ September 2014- November 2016

- Analyzed formative, interim, and summative assessment data and adjusted instruction for TEKS (Texas Essential Skills and Knowledge) that students did not master by grouping students based on ability level, diversifying instruction delivery, and checking for understanding throughout the lesson.
- Increased student scores of the formative assessment, interim, and summative assessment by 55%.

#### **Yes Prep Charter School**

8<sup>th</sup> Grade Social Studies Teacher ▪ Houston, TX ▪ July 2013-May 2014

- Analyzed formative, interim, and summative assessment data and adjusted instruction for TEKS (Texas Essential Skills and Knowledge) and district objectives that students did not master by grouping students based on ability level, diversifying instruction delivery, emphasizing key points, and checking for understanding throughout the lesson.
- Increased student scores of the formative assessment, interim, and summative assessment by 40% according to the State of Texas Academic of Readiness (STAAR).
- Managed the logistics of educational student trips and service projects.

#### **National Young Leaders Forum**

Forum on Law Faculty Advisor ▪ Washington, DC ▪ Summer 2013

- Delivered key educational content on law in groups of up to 30 scholars; led students in legal simulation groups and skills development activities.

Forum on National Security Faculty Advisor ▪ Washington, DC ▪ September 2009- November 2009

- Arranged activities and led site visits to key national security organizations in Washington D.C. including but not limited to the Pentagon, the Naval Academy and the National Security Agency.
- Delivered key educational content on national security in groups of up to 30 scholars; led students in legal simulation groups and skills development activities.

#### **TNTP**

Fort Worth Teaching Fellow ▪ Fort Worth, TX ▪ April 2012-June 2013

- Analyzed formative, interim, and summative assessment data and adjusted instruction for TEKS (Texas Essential Skills and Knowledge) and district objectives that students did not master by grouping students based on ability level, diversifying instruction delivery, checking for understanding throughout the lesson, and tutoring.
- Increased student scores of the formative assessment and interim by 35%.
- High School U.S. Government Teacher ▪ Fort Worth, TX ▪ June 2012- July 2012.
- Analyzed formative and interim data and adjusted instruction for TEKS (Texas Essential Skills and Knowledge) and district objectives that students did not master by grouping students based on ability level, diversifying instruction delivery, and checking for understanding throughout the lesson.

#### **Congressional Young Leaders Conference**

Faculty Advisor ▪ Washington, DC ▪ June 2007- August 2007

- Delivered key educational content on politics and congressional leadership in groups of up to 30 scholars; led students in legal simulation groups and skills development activities.
- Arranged activities and led site visits to the U.S. Capitol, the United States House of Representatives, the U.S. Senate, the U.S. Supreme Court, and the White House.
- Accompanied and led meetings with the scholars and their Members of Congress.

### **Fairfax Partnership for Youth**

National Mentoring Month Assistant ▪ Fairfax, VA. ▪ September 2006- December 2006

- Prepared and distributed National Mentoring Month print materials, including brochures and bookmarks.
- Researched and arranged new distribution outlets for NMM materials.
- Facilitated partnerships with other key organizations.

### **Monster.com**

Diversity Leadership Conference Facilitator ▪ Various States within the U.S. ▪ Summer 2006/2007/2009

- Facilitated activities and events for 30 college students representing top US colleges and universities attending a two-day conference designed to enhance and broaden diversity perspectives and leadership potential.
- Assisted with workshops and ice breaker activities and reviewed resumes; provided one on one career consultation to improve resumes, and mock interviews to sharpen interview skills.

### **Columns/Op Ed Pieces**

#### **Huffington Post**

Columnists ▪ Washington, D.C. ▪ July 2014- Present

- Authored articles on politics, teaching, and women in political leadership
- Authored the following opinion editorials: *Go Run! How to Close the Gender Gap in Politics by Encouraging Young Girls to Consider Careers in Public Service*, *Profiles in Leadership: Idaho State Representative Holli Woodings*, *4 Ways In Which November was an Amazing Month for Women in Politics*, *It's Your Time*, *3 Lessons I've Learned in My 4 Years as a Teacher*, and *Want to Know How to Get Minorities in the Teaching Profession? Ask Students!*

### **Leadership Experience/Professional Development**

#### **50 Can**

Education Policy 101 Training ▪ Washington, D.C. ▪ March 2016- May 2016

- Received training in the history of education policy, standards-based reform, human capital and educator effectiveness, school choice, education finance, early childhood education, and governance and politics.

#### **C-SPAN**

C-SPAN Teachers' Conference ▪ Washington, D.C. ▪ July 2014

- One of the 30 teachers selected from across the nation to learn first-hand about C-SPAN television programming, websites and educational resources to utilize in the classroom.
- Collaborated with C-SPAN fellows and teachers' from across the nation to explore ways in which integrate C-SPAN content into my teaching.

#### **The National Women's Editorial Forum**

"Ready for Prime Time" Media Program Participant ▪ Washington, D.C. ▪ March 2009

- Received professional media coaching for radio and television appearances.
- Authored an op-ed on a policy issue regarding women and politics.
- Networked with bookers from top national television talk shows and media outlets.

#### **American University Women & Politics Institute**

WeLead Program Participant ▪ Washington, D.C. ▪ September 2008- May 2009

- Selected to be one of the 20 young women working in politics to receive training on campaigning, communications and media, public policy and government relations, fundraising and development, and congressional dialogue.
- Received mentoring from Liz Chadderdon, President of the Chadderdon Group, on political strategy.

#### **The White House Project**

Go Run Political Leadership Training and Scholarship Recipient ▪ New York, NY. ▪ September 2008

- Trained on campaign finance, communications, public speaking, and fundraising.
- One of the select few participants to receive a scholarship to attend the program.

**Posse Foundation**

Writing Coach and Scholarship Board ▪ Washington, D.C. ▪ September 2007-April 2009

- Worked with high school students to coach them in their writing skills in preparation for college level writing.
- Collaborated with other scholarship board members to select the 2008-2009 class of Posse Foundation scholars.

**SOFTWARE SKILLS**

- Adobe Creative Suite (Adobe Acrobat, Adobe InDesign, Adobe Photoshop), Microsoft Word (Advanced), SPSS, Salesforce, Campaign Monitor

## Professional Experience

### **Central Indiana Corporate Partnership, Ascend Indiana**

Vice President of Public Policy (*Current*)

- Develop core project scoping, deal flow, and procurement strategies for consulting services
- Coordinate early stage development of talent matching platform and technology solutions
- Conduct legal research to assess and mitigate product and process risk
- Lead data-driven information sourcing, analysis, and reporting efforts
- Support growth of new workforce development programs to meet regional talent needs
- Advise and support the CEO with employer and stakeholder engagement efforts

### **Indiana Office of the Governor**

Director of Education Policy and Adviser to the State Board of Education (*January, 2015 – March, 2016*)

- Primary adviser to the Governor on early childhood through secondary education policy
- Developed policy, legislation, and advocacy strategy for the Governor's education priorities
- Engaged interest groups, associations, legislators, and education-related constituencies
- Established objectives and preparations for monthly State Board of Education meetings
- Managed and supported State Board of Education and education policy staff

### **Indiana Office of Management and Budget, State Budget Agency**

Assistant Director (*January, 2013 – Promoted January, 2015*)

Budget Analyst (*June, 2011 – Promoted January, 2013*)

- Performed centralized fiscal and budgetary oversight of education, workforce development, labor, and economic development-related agencies
- Assisted assigned agencies with biannual budget development processes
- Acquired in-depth understanding of assigned fiscal programs, including the K-12 funding formula, higher education performance funding formula, federal and state workforce development programs, and economic development programs and incentives
- Developed legislative fiscal impact analysis for Budget Agency and Governor's Office staff
- Prepared and presented fiscal policy research for executive and legislative staff
- Evaluated agency revenue and expenditure plans, proposed regulations, and contract agreements
- Managed and supported Education and Economic Development division staff

### **Indiana House of Representatives, Republican Caucus**

Legislative Assistant (*December, 2010 – June, 2011*)

- Assistant to Representatives Bob Behning, David Frizzell, and Bob Cherry
- Produced written committee reports and legislative research for staff and caucus
- Responded to constituent correspondence and interest group inquiries

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## Education

### **Juris Doctorate, J.D.**

Robert H. McKinney School of Law, Indiana University, Indianapolis

- Candidate for July 2017 bar exam

### **Master of Public Affairs, M.P.A.**

School of Public & Environmental Affairs, Indiana University, Bloomington

- Concentrations: Economic Development, Public Finance, Policy Analysis

### **Bachelor of Arts, B.A.**

Indiana University, Bloomington

- Majors: Political Science, History
- Minors: Western European Studies, Philosophy, Sociology
- Awards: Political Science Honors Graduate, Honors Thesis

# **Juliet M. Schmalz, M.D.**

7700 Timber Hill North Drive  
Indianapolis, IN 46217  
317-605-1891

## **Employment**

Physicians Surgery Center  
Victorville, CA  
Locum Tenens April 15-19, 2013;  
June 3-7, 2013

Union Hospital  
Terre Haute, IN  
Locum Tenens April 1-5, 2013; July 15-19, 2013;  
August 12-16 and 19-23, 2013, September 16-20, 2013 to 2014

IU Ball Memorial Hospital  
Muncie, IN  
Locum Tenens May 20-24 and 27-31, 2013  
June 1-July 5, 2013

Major Hospital  
Shelbyville, IN  
PRN work May 2013-present

St. Francis Hospital  
Indianapolis, IN  
PRN work November 2013-present

Logansport Memorial Hospital  
Logansport, IN  
Locum Tenens December 2013-2014

St. Joseph Medical Center  
Mishawaka, IN  
Locum Tenens February 2014-May 2014

Wabash Valley Surgery Center  
Terre Haute, IN  
PRN work July 2014-December 2014

St. Vincent Surgery Center  
Terre Haute, IN  
PRN work December 2014

# Juliet M. Schmalz

## Employment continued

Southeast Anesthesiologists, PC.

Indianapolis, Indiana

Partner

From: July 2004-December 2012; September 2014

To: Present

## Education

Post Residency      University of Arizona Center for Integrative Medicine Fellowship  
August 2011-September 2013

Helms Medical Institute  
Acupuncture Training for Physicians  
December 2010-May 2011

Residency            Indiana University School of Medicine, Department of Anesthesia  
Indianapolis, Indiana. Date of matriculation: June 30, 2004

Internship            St. Vincent Hospital, Transitional Year Program  
Indianapolis, Indiana. Date of completion: June 2001

Medical School      Indiana University School of Medicine  
Indianapolis, Indiana. Graduation Date: May 2000

Undergraduate      Indiana University, Bloomington, Indiana  
B.S. Biology. Graduation Date: May 1996

## Honors

Undergraduate      Dean's List  
Phi Beta Kappa  
Graduated Cum Laude from Indiana University

# **Juliet M. Schmalz**

## **Memberships / Licenses**

ABA Board Certified 2015  
Permanent Medical License obtained June 2002  
Indiana State Medical License  
DEA

## **References**

S. Chase Lottich, M.D.  
533 E. County Line Road, Suite 101  
Greenwood, IN 46143  
317-497-6920

Andrew Corsaro, M.D.  
1550 E. County Line Road, Suite 204  
Indianapolis, IN 46227  
317-887-7605

# STEVE SORREL

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## CORPORATE DEVELOPMENT EXECUTIVE / ENTREPRENEUR

Expert at identifying, assessing, and executing growth opportunities. Successful at leading corporate development teams through identification, assessment, and execution of acquisitions and divestitures. Executed six investments to address disruptive technologies attacking elements of the insurance industry. Capabilities include identifying new market opportunities and entry alternatives, assessing buy, build or partner alternatives, negotiating with targets, business case development, and initiative implementation.

**Areas of strength:** Consumer and commercial lending, insurance, broker dealer, consumer and institutional manufactured investment products, and data analytics.

- Strategy Formulation
- Business Valuation Including Synergies
- Evaluating Distribution Operating Models
- Investment Theses Development
- Corporate Development Sourcing & Execution
- Corporate Venture Capital Investing
- Creating/Profiling Acquisition Candidates
- Partnership & Alliance Management

**Executive Masters of Business Administration** • University of Wisconsin, Madison, WI • 2006  
**Bachelor of Business Administration** • Iowa State University, Ames, IA • 1995

## PROFESSIONAL EXPERIENCE

**CUNA Mutual Group, Madison, WI** **2002 to August 2016**  
**Managing Director, CMFG Ventures** (2015 to August 2016)

Launched CUNA Mutual's corporate venture capital company. Developed and executed an investment strategy to address disruptive technology and new business models specific to insurance.

- Collaborated with senior business unit leaders to develop investment theses that supported growth strategies focused on consumer lending.
- Sourced, performed diligence, negotiated, transacted and oversaw six minority investments.
- Built a deep network to facilitate strong deal flow.
- Executed an accompanying commercial agreement with most portfolio companies yielding additional revenue and income for CUNA Mutual Group.
- Led monthly investment meetings with CMFG Ventures Board of Directors, which included CEO, CFO, and CIO.
- Active Board member to five start-ups, emphasis on providing financial leadership and oversight.

**Vice President of Corporate Development** (2004 to August 2016)

Responsible for developing and presenting corporate strategy alternatives to achieve growth and diversification goals. Led multiple product portfolio reviews resulting in acquisition and divestiture proposals. Directed analysts with a focus on market assessments, financial modeling, and competitor profiling. Liaison with external partners to identify potential acquisition and joint venture targets; conducted diligence with prospective partners. Managed and coordinated both internal and external participants through the acquisition and divestiture processes.



- Responsible for closing acquisitions and joint ventures that produced annual revenue exceeding \$100 million. Successfully divested six business including international assets.
- Developed and recommended corporate strategy alternatives to the CEO and Board of Directors. Executed corporate development initiatives that supported the approved strategy.
- Developed and implemented a strategic framework to evaluate acquisition targets that would provide either product or distribution capabilities.
- Created and populated an acquisition funnel to source opportunities that were expected to generate significant revenue within 3 years.

**Cherry Tree Dental, LLC****2006 to Current****Founder, Partner**

Started and built a dental management company focused on acquiring general dentist practices and executing a consolidation strategy. Responsible for developing market entry strategies, creating deal flow, valuing dental practices, identifying synergies, executing diligence and negotiating terms.

- Acquired 25 general dentist practice, annual revenues exceed \$20M and EBITDA is greater than \$3M.
- Developed 6 dental clinics to facilitate the execution of the consolidation strategy and the realization of cost synergies.
- Led multiple offerings to secure subordinated debt to fund future growth. Restructured bank debt to facilitate accelerated growth.
- Built and managed internal processes to support scalable growth.

**PriceWaterhouseCoopers Consulting, Chicago, IL****1997 to 2002****Manager / Senior Manager (1997 to 2002)**

Sold and managed consulting services relating to the installation of PeopleSoft™ and Commerce One™ for companies in the financial services industry. Served as project leader and directed both small (5 to 10 people) and large (100+ people) multi-functional consulting and client teams. Held full P&L management responsibility for 4 technology engagements cumulatively valued in excess of \$15 million.

- Delivered every client engagement on-time and within budget, while exceeding the assigned \$4 million annual revenue goal by more than 50% for 2 consecutive years.
- Ranked in the top 5% of all peer performers during each year of service. Acknowledged as the 2001 top-performing Senior Manager among more than 125 other Senior Managers in the \$500 million central region business unit.

**ACCENTURE (formerly Andersen Consulting), Minneapolis, MN****1995 to 1997****Analyst**

Position focused on delivering integrated accounting and reporting systems to state governments.

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## CHARLES SCHLEGEL

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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:**
- Educational Consultant** (8/15 – Present)
- 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.
  - 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*.
  - Design systems to improve the leadership pipeline for the Austin, TX and Minneapolis school districts, matching the unique needs of different schools to distinguishing strengths of principal candidates.
- Adjunct Professor, Marian University** (7/10 – Present)
- Lead seminars and teach courses in school leadership, teacher selection and evaluation, curriculum assessment, school culture and data-based decision making, required for administrative licensing.
  - 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** (3/12-12/16)
- Led a network of four Indianapolis public 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 high 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 an Indianapolis elementary school (480 students; 85% low-income); transformed from among the state's 5<sup>th</sup> worst 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:****Family Learning Working Group, Indianapolis Children's Museum** (8/16 – Present)

- Advise museum leaders in the development of educational programs and organizational developments; advocate for and promote efforts to improve museum access and usage among low-income communities.

**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, Starfish Initiative** (1/16- Present)

- Support through mentoring and guidance the academic focus, college preparation and overall future orientation of a current ninth grader, who is likely to be first in his family to pursue a college education.

**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.

**Additional Information:**

References available upon request

## Attachment 2: Board Member Information Form

All required ICSB Board Information sheets are on the subsequent pages.

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: *Athlos Academy of Indiana*
2. Your full name: *Ashley Gibson*
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.  
*As a Board member, I bring extensive knowledge of the education policy landscape having served in K-12 education roles for a governor, state superintendent, and education not-for-profits.*
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  
*Chad Timmerman; Professional Contact*  
*Elsie Owolo; Professional Contact*
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. Indicate any potential ethical or legal conflicts of interests that would, or are likely to, exist should you serve on the school's board.

None.     Yes

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> Ashley Gibson Director, Government Relations The College Board	<u>Date</u> 08/25/17
<u>Signature</u> Ashley Gibson	

Exhibit C

**Charter School Board Member Information Form**

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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. Indicate any potential ethical or legal conflicts of interests that would, or are likely to, exist should you serve on the school's board.

None.  Yes

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

Chad Zimmerman



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:  
**Athlos Academy of Indiana**
2. Your full name:  
**Elsie Owolo**
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.  
I would be an effective board member because my various experiences in education and policy. As an educator, I taught middle school civics for four years in Texas in both traditional public school and charter schools. I have also worked with students in Washington D.C. and taught an experimental learning curriculum. My policy experience includes working with the California Charter School Association where I helped with various aspects of the school choice movement in California. Additionally, I've worked for various members of Congress and other political leaders around education policy. I'm currently the policy manager for Teach Plus Indiana.
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. Indicate any potential ethical or legal conflicts of interests that would, or are likely to, exist should you serve on the school's board.

None.  Yes

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>	<u>Date</u>
<p>Elsie Owolo / Policy Manager</p> <p><u>Signature</u> <i>Elsie Owolo</i></p>	<p>8/25/17</p>

Exhibit C

**Charter School Board Member Information Form**

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

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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: **STEVEN ANDREW SORREL**
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.  
**TEN YEARS AGO I STARTED MY OWN COMPANY. I HAVE SAT ON THE BOARD OF ~~SOME~~ FIVE START-UPS.**
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    **DR. JULIE SCHMALZ IS MY SIGNIFICANT OTHER.**
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. Indicate any potential ethical or legal conflicts of interests that would, or are likely to, exist should you serve on the school's board.

None.  Yes


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> STEVE SORZEL	<b>Date</b> 8/25/17
<b>Signature</b> 	

Exhibit C

**Charter School Board Member Information Form**

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

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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: *Ahlos Academy*
2. Your full name: *Juliet Marie Schmalz*
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.

*No previous board experience. I believe I will be an effective board member due to my wellness training and background as well as my passion for health & wellness.*

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    *Steve Sorrel is my significant other.*
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. Indicate any potential ethical or legal conflicts of interests that would, or are likely to, exist should you serve on the school's board.

None.  Yes

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

Juliet M Schmalz

Date

8/29/17

Signature

Juliet M Schmalz

## Attachment 3: Education Service Provider Information

### ESP Overview

Athlos Academies (ESP) was founded in 2007 by co-founders Ryan Van Alfen and Jason Kotter. Athlos Academies (ESP) is a social venture dedicated to helping schools succeed through improving the landscape of education by providing schools with the services and support needed for success. Specifically, Athlos Academies brings the innovative professional development and program model consisting of the three pillars of Healthy Body, Performance Character, and Prepared Mind. The ESP also provides back office management services and a facility solution for their partners.

The leadership team at Athlos Academies (ESP) begins with the co-founders, Ryan and Jason. Other executive support positions include general counsel, chief development officer, chief financial officer, president of education services, chief academic officer, chief school operations officer, and chief community relations officer. On the teams of each of the executive staff members are individuals with expertise to support our schools through their facility development, back office and day-to-day operation needs, professional development support, program implementation support, student and staff recruitment support, and marketing and community relations support. The staffing of the ESP is designed to support the mission of being an end-to-end solution for high-performing schools that address the needs of the whole child and contribute to the success of the community in which they are located. A summary of the organization roles is shown in the ESP org chart in Attachment 14.

## ATHLOS PARTNERSHIPS

Athlos Partner School	Year of Partnership	Facilities	Healthy Body Pillar	Performance Character Pillar	Prepared Mind Pillar	Management Services
Compass Charter School (Meridian, ID)	2007	X				
Candeo Schools (Peoria, AZ)	2008	X				
Hawthorn Academy (West Jordan, UT)	2008	X				
Legacy School (Mesa, AZ)	2009	X				
Legacy Traditional (Queen Creek/Ironwood, AZ)	2010	X				
Legacy Traditional (Casa Grande, AZ)	2010	X				
Athlos Traditional Academy (Chandler, AZ)	2011	X				
Legacy Traditional (Avondale, AZ)	2011	X				
Legacy Traditional (Oro Valley, AZ)	2011	X				
Providence Hall (Herriman, UT)	2011	X				
Legacy Traditional (Laveen, AZ)	2012	X				
Legacy Traditional (Gilbert, AZ)	2013	X				
Athlos Leadership Academy (Austin, TX)	2014	X	X	X		
Athlos Leadership Academy (Brownsville, TX)	2014	X	X	X		
Athlos Leadership Academy (San Antonio, TX)	2014	X	X	X		
ILTexas, Powered by Athlos (Arlington, TX - KB)	2014	X	X	X		
ILTexas, Powered by Athlos (Fort Worth, TX - KB)	2014	X	X	X		
ILTexas, Powered by Athlos (Garland, TX - KB)	2014	X	X	X		
ILTexas, Powered by Athlos (Garland, TX - HS)	2014	X	X	X		
Athlos Leadership Academy (Brooklyn Park, MN)	2014	X	X	X	X	X
Legacy Traditional (Surprise, AZ)	2015	X				
Athlos Academy of Utah (Herriman, UT)	2016	X	X	X	X	X
Athlos Academy of St. Cloud (St. Cloud, MN)	2016	X	X	X	X	X
Athlos Leadership Academy - Premier (San Antonio, TX)	2016	X	X	X		
ILTexas, Powered by Athlos (Grand Prairie, TX - KB)	2016	X	X	X		
ILTexas, Powered by Athlos (Grand Prairie, TX - HS)	2016	X	X	X		
ILTexas, Powered by Athlos (North Richland Hills, TX - KB)	2016	X	X	X		
ILTexas, Powered by Athlos (Katy, TX - KB)	2016	X	X	X		
ILTexas, Powered by Athlos (Houston, TX - KB)	2016	X	X	X		
ILTexas, Powered by Athlos (Richmond, TX - Katy-Westpark HS)	2017	X	X	X		
ILTexas, Powered by Athlos (Lancaster, TX - KB)	2017	X	X	X		
ILTexas, Powered by Athlos (Saginaw, TX - KB)	2017	X	X	X		
ILTexas, Powered by Athlos (Saginaw, TX - HS)	2017	X	X	X		
ILTexas, Powered by Athlos (East Fort Worth, TX - KB)	2017	X	X	X		
ILTexas, Powered by Athlos (Houston, TX - Windmill Lakes KB)	2017	X	X	X		
Athlos Academy of Jefferson Parish (Jefferson Parish, LA)	2018	X	X	X	X	X

As shown in the image above, Athlos Academies (ESP) began as a facility solution organization for charter schools. The progression of partnerships for facilities, portions of the three pillar model as they have been developed, and now fully implementing school support has evolved uniquely since 2007. The progression of these partnerships, and evidence of the geographic footprint of the organization, can be seen in the above image to help explain the short track record from fully implementing partners.

The ultimate goal of Athlos Academies (ESP), is to provide strong partners who are invested in the Athlos model with the wrap-around support they need to help students succeed and communities thrive. The work that goes into a start-up is no easy feat, but it is in those challenges that the ESP is able to grow and provide even better support for schools year-over-year. With the robust background in a variety of partnerships with different charter school networks, the ESP has learned how to meet the needs of a wide-range of communities. This history has set the ESP up for success when taking on new partnerships with the fully-implementing model. The vision for growth at Athlos Academies (ESP) is to build deep, local roots in each community being served, to prove a successful and high-performing model before replicating, to provide excellent service to the school and governing board, and to commit to long-standing and authentic relationships within the state and communities being served.

### Due Diligence of the AAI Board

Athlos Academy of Indiana's (AAI) board of directors has many responsibilities, but the functions that carry the most weight are to ensure high academic achievement for students and safeguard that the school continues to be a viable organization to provide stability to families and the community. Due to these high priorities for the board, the partnership with Athlos Academies as an Education Services Provider (ESP) was chosen due to their innovative education model, top-notch facilities, and proven track record of academic success in other states. Athlos Academies will bring a unique learning experience to the state of Indiana. Based on a three pillar model, Athlos Academies' (ESP) approach to a student's education is equally devoted to a Prepared Mind, a Healthy Body, and Performance Character. It is the belief of the AAI board that a child can only be set-up for success when approaching their educational career in a holistic manner, and Athlos Academies' (ESP) model reflects this desired implementation for our students through their three pillar approach.

It is important that AAI have a steadfast partner to ensure student success. In addition to Athlos Academies (ESP) innovative approach to student curriculum, AAI will also benefit from added support by having them as an ESP to ensure excellence in the school. They will help provide and coordinate positive school culture, family and community involvement events, health and wellness integration, students support systems, teacher professional development, student-led conferences, and a whole list of additional services to keep the school alive and thriving. The most immediate and crucial support Athlos Academies (ESP) will provide AAI is help in recruiting school leader candidates for the Board to interview and eventually hire. This is a decision that cannot be made lightly, and having an ESP that can help cast a wide net to ensure there is high-quality talent recruited is essential. This support system also comes with a team prepared to guide the board in securing location to build a world-class facility tailored to promote student learning and a culture of wellness.

Furthermore, AAI's focus on the Southeast portion of Marion County is done with great intention. Athlos Academies (ESP) has experience serving populations of high English-language learners and refugee communities. The Southeastern part of Marion County, Beech Grove, Perry Township, and Franklin Township are areas that have opened their arms to be new homes to many families of the Chin



population from Burma. Providing these students educational options is incredibly important, but even more critical is working with an ESP who has a foundation of what this specific-student population needs to be successful, and Athlos Academies (ESP) can provide such institutional knowledge to AAI.

In short, the AAI board of directors feels the school's successful integration into the local education community would not be possible without Athlos Academies as an ESP. The board feels confident from the conversations and interactions had with Athlos Academies (ESP) that they are the best partner to take on such an important endeavor as providing families and students with more educational options. AAI and Athlos Academies (ESP) working together will build a strong school and help each of our students reach their maximum potential through intelligence, athleticism, and character curriculums.

### Acknowledgements

There are no existing or potential conflicts of interest between the school governing board and the proposed ESP. Further, the board understands that the ESP is a contracted service provider who they may fire at any time under just cause outlined in the Master Service Agreement. The board understands that they have the autonomy to govern the school as a structurally independent entity from the ESP and will approve policies, comply with state and federal laws to support the school as a governing body, and will engage their own legal counsel. Upon approval of the charter application, the governing board will use a portion of the start-up line of credit from the ESP to engage their legal counsel to support the execution of the final Master Service Agreement and to support the governing board throughout the life of the school.

### Draft Master Service Agreement

Note: Items highlighted in yellow are marking information that will be negotiated between Athlos Academies (ESP) and the governing board of Athlos Academy of Indiana upon approval. The governing board has been reviewing the licensing agreement, lease agreement, and service fee for all opening contingency plans with the ESP and will work with their lawyer upon approval to further pursue decisions to execute each contract. Beginning on the following pages is the DRAFT Master Service Agreement for Athlos Academy of Indiana.

# **FULLY IMPLEMENTED SCHOOL SERVICES AND LICENSE AGREEMENT**

This FULLY IMPLEMENTED SCHOOL SERVICES AGREEMENT (“**Services Agreement**” or “**Agreement**”) is made as of this \_\_\_\_ day of \_\_\_\_\_, 2017, by and between School Model Support, LLC dba Athlos Academies, (hereinafter “**Athlos**”), and Athlos Academy of Indiana, an Indiana non-profit corporation, (hereinafter “\_\_\_\_\_” or “**Organization**”).

## **RECITALS**

**WHEREAS**, Athlos is an Education Services Provider that has developed and owns an educational concept and program and provides, (1) a three pillar program and approach to education focusing on Prepared Mind, Performance Character, and Healthy Body, (the “**Athlos Program**”), (2) license to use Athlos’s copyrighted, trademarked, trade secrets and other intellectual property to assist in the implementation of the Athlos Program, (3) school opening, operations, and ongoing management services, and (4) charter school facility development, construction, leasing, and facility purchase option solutions.

**WHEREAS**, Organization desires to obtain Athlos’s services to develop and implement educational excellence based on the Athlos Program design, and further desires to obtain a license to use and implement Athlos’s copyrighted materials, trade secret information, and other intellectual property as necessary for the implementation of the Athlos Program, pursuant to the terms hereof, and Athlos is able and willing to provide the services and license the material as hereinafter set forth;

**WHEREAS**, the Organization and Athlos acknowledge and agree that, in accordance with Applicable Law (as defined below), the Board of Directors of the Organization (the “**Board**”) has the primary responsibility and ultimate authority for the operations of the School, is the governing authority of the School, and may carry out any act and ensure the performance of any function that is in compliance with the Charter, any policy statements and guidance issued by the Indiana State Board of Education; The Indiana Charter School Board (“**Authorizer**”); the Indiana Constitution; the Individuals with Disabilities in Education Act; the Family Educational Rights and Privacy Act; and other applicable federal, state or local statutes, ordinances, and regulations; implementing regulations of such laws; executive orders; common law; and other guidelines, policy statements, and rulings applicable to Indiana public charter schools (collectively, “**Applicable Law**”); and

**WHEREAS**, the Authorizer has reviewed and approved this Agreement prior to execution to ensure it complies with the Authorizer's requirements for contracting with educational management organizations, applicable law, the Charter generally, and is not otherwise against public policy; and

**WHEREAS**, Organization's Board desires to license from Athlos information and materials, and further desires to engage Athlos to perform services, related to Athlos's educational program, operations and support services, described herein and as permitted by the Charter and Applicable Law.

## **AGREEMENT**

**NOW, THEREFORE**, in consideration of the covenants and agreements contained herein, and for other good and valuable consideration the sufficiency of which is hereby acknowledged, Organization and Athlos (together, the "**Parties**" and each a "**Party**"), do hereby agree as follows:

**1. TERM.** Organization agrees to engage Athlos for an initial five-year term, commencing on the effective date of this Agreement (the "Term Commencement Date") and shall terminate on the fifth (5<sup>th</sup>) anniversary of the Term Commencement Date. Athlos and Organization may mutually agree to extend this agreement with permission of the Authorizer and, if so, must mutually agree in writing to any date specified in the extension agreement which shall not exceed the term of the Charter, inclusive of renewals.

### **2. ACKNOWLEDGEMENT OF CHARTER AND BOARD POWERS**

**A. Compliance with Charter.** Athlos shall comply with all applicable law and the terms and conditions of the Charter. If the terms of the Charter and this Agreement are in conflict, the terms of the Charter shall prevail. At no time shall Athlos interfere with the Organization's ability to perform its obligations under the Charter. Athlos recognizes that the Organization shall at all times remain legally responsible to the Authorizer for the operations and management of the Charter School and for ensuring that the terms and conditions of the Charter are satisfied.

**B. Powers of the Organization Board of Directors.** Athlos recognizes that the Organization's Board of Directors shall be structurally independent of Athlos and shall set and approve broad school policies, such as the budget, curriculum, student conduct, school calendars, and dispute resolution procedures. The Organization shall be the recipient of all public funds that are disbursed to fund the operations of the Charter School and all other funds to which the Charter School or the Organization is entitled, Athlos shall comply with all terms and conditions established by any funding source.

### 3. PROVIDER STATEMENT OF SERVICES

#### C. Education Services

- i) Athlos Program. Provide Health Body, Prepared Mind, and Performance Character pillars, and schoolwide structures (collectively, “**Athlos Program**”);
  1. *Onsite Training*. Provide onsite Athlos Program training and consulting;
  2. *Access to Healthy Body Lesson Plans*. Access to Athlos Healthy Body Curriculum, including hundreds of daily athletic movement lesson plans, for grades K-8;
  3. *Access to Performance Character Huddle Plans*. Access to Performance Character Huddle Curriculum, including over one hundred lesson plans and a lesson planning template, for morning huddles centered around the twelve Athlos Performance Character traits, for grades K-8;
  4. *Curriculum Selection*. Assistance with selection of ELA, Math, Science and Social Studies curricular programs and resources, including unit and lesson planning templates.
- ii) Professional Development Training. Ongoing support including and related to:
  1. *Athlos Program Training*. Coordinate and provide professional development training, including initial and ongoing training for the Athlos Program for use by school personnel;
  2. *Athlos Program Materials*. Provide professional development tools and resources via learning management system, for the Athlos Program;
  3. *Professional Collaborative Teams*. Assist and support professional collaborative teams, including leadership team, professional learning communities, data/MTSS team, and content area teams;
  4. *School Personnel Support*. Assist with teacher and school leader support and development;

5. *Workshops and Conferences.* Host leadership workshops for school leaders and board members to attend (Athlos Institutes), and invitation to all Athlos Program related conferences at Athlos Home Court in Boise, Idaho;
  6. *Webinars.* Hosting live virtual meetings, and presentation of professional development webinars, focused on the implementation of the Athlos Program.
- iii) Benchmark Performance Assessment Plan. Assist Organization with developing and implementing a student performance assessment plan, and analyzing data to inform instructional decision making;
  - iv) Staff, Student and Family Surveys. Provide satisfaction surveys for staff and families, and social emotional learning surveys for students.

#### **D. School Operations and Ongoing Management Services**

- i) Initial Enrollment. Community outreach and marketing support for various marketing campaigns for the purpose of student enrollment; these services, which will be provided and/ or funded by Athlos, may include the following:
  1. *Marketing.* Temporary marketing signs at the Charter School Facility site. Marketing through neighborhood meetings, newspaper and digital advertising, billboards, radio spots, and community outreach for the purpose of student enrollment;
  2. *Enrollment Processing.* Assistance with enrollment processing;
- ii) Ongoing Enrollment. Consultation and assistance with the creation and review of marketing materials, as well the recruitment plan and support, for the purpose of ongoing student enrollment and retention;
- iii) Financial Services and Reporting. Provide accounting services, including payroll, accounts receivable, accounts payable, and other necessary accounting functions; provided, however, Athlos shall provide full disclosure and access to such records as Organization may reasonably require.
- iv) Maintenance of Financial Records. Provider will maintain accurate financial records pertaining to the operation of the school and retain these records as required by applicable laws and regulations. All the financial records retained

by Provider pertaining to the Organization will be available to Organization, and all other appropriate regulatory authorities for inspection and copying at the Organization's facilities upon request, it being understood that in most cases, such copies will be made available within thirty (30) business days. Provider, and its representative officers, directors, employees and designated agents are hereby authorized to serve as agents of the Organization and agree to maintain the proper confidentiality of such records as required by law and the Charter.

- v) Governing Board Reporting. Create and provide on a monthly basis an Athlos Report, and a Director's Report, to the Governing Board. The Athlos Report shall contain a summary of Provider's services and performance in the preceding month. The Director's Report shall contain a summary of key measurables and progress of the school in a format to be determined collectively by the School Leader and Provider.
  
- vi) School Policies. Provide initial drafts of written policies relating to curriculum and other educational matters, compliance, employment, operations, and relations between the School and students/parents;
  
- vii) School Support Forms. Assist in the development and refinement of school support forms relating to school operations (such as enrollment forms, parent surveys, and other office forms);
  
- viii) Personnel Recruitment and Training:
  - 1. *School Personnel Recruitment.* Assistance with the recruitment of candidates for the school through various activities. However, the Board shall retain ultimate authority with respect to any personnel decisions, including, without limitation, the authority to determine criteria for hiring, compensation, discipline and dismissal.
  
  - 2. *Instructional Leaders.* Assistance with the recruitment of candidates for instructional leaders/coaches through various activities. However, the Board shall retain ultimate authority with respect to any personnel decisions, including, without limitation, the authority to determine criteria for hiring, compensation, discipline and dismissal.
  
  - 3. *Employment of School Leaders.* Provider shall be responsible for recruiting and employing the School Education Leader and the school Operation Leader (collectively the "School Leaders"). Provider will employ the School Leaders to provide continual education and administrative support. Provider shall be reimbursed for the costs of these employees. The School Leaders

scope of work, authority from the Board, and cost, shall be set forth in the School Leaders Agreement in the form attached hereto as Appendix [REDACTED].

4. *Criminal History Background Checks.* All EMO employees, contractors of the EMO, or employees of contractors of the EMO who have direct, ongoing contact with children at the Charter School within the scope of their employment, shall be subject to criminal background check requirements to the same extent as employees of the Organization who have direct, ongoing contact with children at the Charter School within the scope of their employment.
- 5.

ix) Technology.

1. *Learning Management System.* Set up the School and staff accounts, and provide access and ongoing training to the Learning Management System used by Provider.
2. *Student Information System.* Set up the School, and provide access and ongoing training to the Student Information System that Provider uses. Provider shall be reimbursed for the costs of the Student Information System. The Student Information System invoice shall be attached hereto as Appendix [REDACTED].
3. *Athlos Tools.* Grant Organization access to Athlos Tools, which provides a platform for student assessment, data collection, and curricular resources.
4. *Website.* Provide Organization with the School's website platform. Annual website renewal and assistance with website content.
5. *Email.* Assist Organization with acquiring a domain for its email addresses.
6. *Social Media.* Assist Organization in developing the School's social media accounts, and provide social media content training.

x) School Opening. Assistance with the following:

1. *Groundbreaking Ceremony.* Assist with planning a community groundbreaking event on school site.

2. *Open House.* Assist with initial open house and ribbon cutting;
  3. *Parents' Night.* Assist with training and assistance with Parent's Night
- xi) Community Engagement. Assist with community/parent events and engagement.
- xii) Traffic Management. Provide initial and ongoing training related to traffic management software selected by Athlos, and managing student drop-off and pick-up;
- xiii) Branding.
1. Provide brand guide and logos;
  2. Provide internal school signs and gym logos;
- xiv) School Uniforms.
1. Provide approved Athlos school uniforms for the sale/distribution to students;
  2. Provide approved Athlos gym wear for the sale/distribution to students;
- xv) Preferred Purchasing. Provide business contacts that may permit the Organization preferred access to sports products, apparel and equipment with industry leading brands;
- xvi) Student Data. Provider shall ensure the confidentiality of any personally identifiable student information from any education record that is received from or maintained on behalf of the Organization. As an organization performing services that would otherwise be performed by the Organization, and conducting studies for the purpose of validating the program's impact on improving instruction, Provider shall perform its services and conduct its studies in such a manner as will not permit the unlawful disclosure of personally identifiable student information from education records and shall destroy such personally identifiable student information when the information is no longer needed for its intended purpose. Furthermore, Provider shall comply with any and all federal, state and local laws affecting the services covered by this Agreement. Such laws include: (a) Family Educational Rights and Privacy Act (FERPA); (b) Protection of Pupil Rights Amendment (PPRA); and/or (c) Health Insurance Portability and Accountability Act of 1996 (HIPPA), to the extent applicable.



- xvii) Charter Compliance and Reporting. Athlos shall furnish all information relating to its contract with the Organization that is deemed necessary by the Organization or the Authorizer (i) to fulfill the Organization’s reporting requirements under the Charter, (ii) for the Indiana Charter Board’s proper oversight of the Charter School operations, and (iii) as otherwise required under applicable law or the Charter. This information shall be prepared by Athlos in accordance with the uniform accounting principles prescribed by the State Board of Education and the State Board of Accounts, or in such other form as may be required under applicable law or the Charter.

#### 4. DUTIES OF ORGANIZATION

- i) Athlos Program Implementation. While Provider will provide training and resources regarding the Athlos Program, Organization is responsible for the implementation and use of the Program. Organization shall implement and use the program consistent with Provider’s training.

1. *Webinar Attendance.* All Organization instructional personnel shall attend and participate in a minimum of [number] ( ) webinars presented by Provider, per calendar year, and shall complete and submit to Provider within two weeks of the date of the webinar, any worksheets or assignments corresponding to the webinar topics, as assigned by the webinar presenter.
2. *Responsible Person.* Organization shall designate an employee who shall serve as the primary point of contact for Provider with regard to implementation of the Program, and who shall be responsible for ensuring Organization’s implementation of the Program consistent with the training and standards of Provider. The Responsible Person shall be: [Name]. In the event the Responsible Person identified herein ceases to be employed by Organization, or Organization otherwise wishes to designate some other employee as the Responsible Person, Provider must consent in writing to the newly designated Responsible Person, which consent shall not be unreasonably withheld.

Responsible Person shall maintain current staff rosters, including names, campus assignments, and email address, and provide the same to Provider upon request.

Responsible Person shall communicate with staff to ensure webinar participation, and shall maintain staff webinar attendance records, and ensure staff submits webinar worksheets and assignments via the learning management system, in a timely fashion.

- ii) Board of Director's Meetings. Conduct and attend monthly Governing Board meeting. The Athlos Report and Director's Report as set forth in paragraph (xi) section 4 of this Agreement, shall be presented in each Governing Board meeting, prior to any committee reports, discussion items, or other agenda items.
- iii) School Policies. Organization shall complete and thereafter adopt school policies.
- iv) Student Data. To the extent permitted by FERPA, the Family Educational Rights and Privacy Act, 20 U.S.C. 1232g, and its implementing regulations, Organization shall provide athletic performance results (whether Fitnessgram or some other standard), standardized academic test results by student, and other student assessment data points to enable Athlos to assess performance of the school and program performance.

1. Organization shall provide updated student data, for all students, to Athlos at least weekly to maintain student rosters via a secure site.
2. Student performance assessments, for all students, related to the Athlos Program shall be provided to Athlos, via Athlos access to PowerSchool or other similar student data tracking software. Student fitness data shall be provided via upload of the data and assessments to Athlos Tools, within 30 days of the completion of the fall and spring assessments.

**5. LICENSE.** Athlos hereby grants a license to Licensee for use of such Licensor intellectual property necessary to implement the Athlos program, including those copyrights, trademarks, and trade secrets as set forth herein.

**A. Scope of License.**

- i) Definition of Licensed Material. Licensor is in the business of providing education services, curriculum, and management support to charter schools in various locations throughout the United States. Licensor has developed a unique education curriculum that promotes a prepared mind, healthy body, and performance character. Licensor has developed and continues to develop commercially valuable technical and non-technical information and materials ("**Licensed Material**") that is copyrighted, proprietary, confidential and/or constitutes Company's "trade secrets" within the meaning of the Idaho Trade Secrets Act, Idaho Code Sections 48-801 – 48-807, and/or other laws. The Licensed Material, collectively referred to as "Powered by Athlos Program" shall include:

1. Access to Licensor's learning management system, including but not limited to Canvas and Athlos Tools, with online, personalized learning paths, recorded webinars on best practices, and training videos.
  2. Healthy Body curriculum.
  3. Performance Character curriculum.
  4. Means and Methods of incorporation of the Healthy Body and Performance Character curriculum into the school day
  5. Athlos Trademarks, Logos, and Brand Materials, as set forth in the Athlos Brand Guide, attached hereto as Appendix   .
- ii) Use and Disclosure of Licensed Material. Licensee shall not, at any time, either during the term of this Agreement or subsequent thereto, directly or indirectly,
1. use or appropriate any Licensed Material for any purpose other than the implementation of the Powered by Athlos Program at Licensee's schools, as set forth in this Agreement; or
  2. disclose or divulge any Licensed Material to any third person or entity, unless expressly authorized or directed to do so by Licensor or required to do so by a court or other governmental entity acting with the force of law.
- iii) Protection of the Secrecy of Licensed Material. Licensee shall make reasonable efforts to protect the confidentiality or secrecy of Confidential Information within its care, custody, possession or control, by
1. requiring all Licensee employees to adhere to the terms of use of the License,
  2. limiting such employees' access to the Licensed Material on a "need to know" basis,
  3. reminding such employees of their confidentiality obligations in exit interviews upon termination of their employment,
  4. precluding non-employee access to confidential and/or proprietary information under the License, absent express written consent from

Licensor,

5. shredding hard copies of all confidential, copyrighted or other proprietary documents within Licensee's care, custody, possession or control, by virtue of the License, prior to its disposal,
  6. utilizing security measures to control access to the computer, building or files where Licensed Material is kept, and
  7. making any and all other efforts that are reasonable under the circumstances to maintain the secrecy of Licensed Material.
- iv) Ownership and Return of Licensed Material. All documents and information within the Licensed Material, provided to or obtained by Licensee, as well as all documents and things prepared by Licensee in relation to the Powered by Athlos Program, or in the course and scope of Licensee's use of the License, and any and all copies, reproductions and extracts thereof, are the exclusive property of Licensor and shall be returned immediately to Licensor upon termination of this Agreement or upon Licensor's request at any time. Upon written consent of Licensor, such documents and information may be destroyed rather than returned to Licensor, upon termination of this Agreement.

## **6. CHARTER SCHOOL FACILITY SOLUTION**

- A. Provider will present Organization with a charter school facility development, construction, and leasing solution. That solution will require Organization to enter into a Build to Suit Lease with the real property owner, of the site selected by Provider. Provider will work hand in hand with the property owner and property developer to provide a charter school facility that will support the Athlos Program.

## **7. TERMINATION.**

- A. Conditions.** A Party or the Parties may terminate the agreement for the following reasons, and subject to the following conditions:

- (i) Termination by Organization. Organization may terminate this Agreement with cause in the event that Athlos fails to remedy a material breach within sixty (60) days after notice from Organization, or such longer period as may be necessary to cure the breach or default. A material breach includes, but is not limited to, a breach or default by Athlos to provide the Services in a manner sufficient for Organization to operate the School in compliance with the terms and conditions of this Agreement, or a violation of Applicable Law. In the event Organization

unilaterally terminates this Agreement prior to the end of a five-year term period, for any reason other than for a material breach by Athlos, Organization shall be liable to Athlos by such damages as allowable by law.

- (ii) Termination by Athlos. Athlos may terminate this Agreement with cause in the event that Organization fails to remedy a material breach within sixty (60) days after notice from Athlos, or such longer period as may be necessary to cure the breach or default. A material breach includes, but is not limited to, failure by Organization to pay amounts due under this Agreement, unreasonable failure to meet performance standards, or Organization has not otherwise complied with its obligations under this Agreement. In the event Organization unilaterally terminates this Agreement prior to the end of a five-year term period, for any reason other than for a material breach by Organization, Athlos shall be liable to Athlos by such damages as allowable by law.
- (iii) Termination at Request of Authorizer. Organization may terminate Athlos if the Authorizer if the Agreement or its implementation would serve as grounds for revocation under the Charter, would jeopardize the tax exempt or not-for-profit status of the Organization, would create adverse tax consequences for the Organization, or would cause the Organization to be in violation of applicable law; or for failure by Athlos to meet the performance criteria outlined in the Accountability Plan.
- (iv)
- (v) Termination upon Loss of Charter, State Funding or Non-Appropriation of Funds. If the State (i) revokes, does not renew, or materially changes a Charter, or (ii) Organization has been informed in writing that a Charter will be revoked or will not be renewed; or (iii) Organization is no longer funded by the State of Indiana, then either Party may, upon thirty (30) days written notice terminate this Agreement as to the affected terminated School(s) without penalty, further obligation or liability of any kind to either Party. The event shall trigger provisions of Section 5.A.(v) below.
- (vi) Termination by Mutual Consent. This Agreement may be terminated by the mutual written consent of both Parties without penalty. Such termination shall be effective at such time, and upon such other terms as set forth in the written consent. Except as otherwise agreed by the Parties in writing, termination does not relieve Organization of any obligations for payments outstanding to Athlos as of the date of termination. Other obligations of either Party may specifically continue and survive termination as provided in this Agreement.

**B. REMOVAL OF PROGRAM.** Upon a termination as provided herein, or where the term expires and is not subsequently extended by Organization, Organization shall:

- (i) Cease using the Athlos Program Curriculum and professional development tools/materials provided by Athlos.
- (ii) Return as requested and/or destroy all Athlos intellectual property provided to Organization for the purpose of implementing the Powered by Athlos Program;
- (iii) Organization shall comply with the terms of this Section 5.A.(v) no later than ninety (90) days after Athlos's receipt of such notice of termination, and shall submit compliance verification audit ninety (90) days following termination.

**8. SERVICE AND LICENSE FEE.** Athlos shall receive a Services and License Fee ("Fee") from Organization equal to [REDACTED], payable in monthly installments. Payment shall be determined in accordance with generally accepted accounting principles. The Services and License Fee shall be as follows:

**A. Fee Commencement.** The Fee as set forth in this Section 7 shall commence on the date Organization begins receiving payment from the State of Indiana, which will be July 2019, with the first payment due no later than September 1<sup>st</sup>.

**B. Monthly Installments.** The Fee shall be paid in 12 monthly installments. The Fee shall be payable monthly on the first day of the month that services will be provided. For example, payment for the month of September shall be due on September 1<sup>st</sup>.

(i) Monthly Installment Calculation. The Monthly Installment shall be calculated by [REDACTED].

**C. Late Payment Fee.** Organization agrees that any payments received after the due date shall include a one percent (1%) monthly late fee assessment.

**D. Reasonableness.** The Parties hereto acknowledge and agree that as of the date of this Agreement, the Fee payable to Provider is reasonable, necessary and fair market value compensation for services rendered; and upon payment of the fee to Provider, those revenues become the sole property of Provider and are no longer the State of [state name] public funds.

**E. Other.** The Fee is the only compensation or other payments, to which Provider will be entitled hereunder. Provider shall be responsible for all of its own costs and expenses necessary to fulfill its obligations under this Agreement, including, but not limited to, compensation, travel expenses, and other benefits payable to any of Provider's employees.

- 9. NOTICES.** All notices given pursuant to this Agreement shall be in writing and shall be given by personal service, by facsimile, by United States Mail or by United States Express Mail or other established express delivery service (such as Federal Express) or by certified mail, postage or delivery charge prepaid, return receipt requested, addressed to the appropriate Party at the address set forth below:

If to Athlos:

School Model Support LLC

Attn: Legal Department

918 W Idaho St.

Boise, ID 83702

If to Organization:

[name of school officer or agent]

[school name]

[street address]

[city, state, zip]

The person and address to which notices are to be given may be changed at any time by any Party upon written notice to the other Party. All notices given shall be deemed given upon receipt; and

For the purpose of this Agreement, the term "receipt" shall mean the earlier of any of the following: (i) the date of delivery of the notice or other document to the address specified above as shown on the return receipt and/or facsimile confirmation, (ii) the date of actual receipt of the notice or other document by the person or entity specified above, or (iii) in the case of refusal to accept delivery or inability to deliver the notice or other document, the earlier of (A) the date of the attempted delivery or refusal to accept delivery, (B) the date of the postmark on the return receipt, or (C) the date of receipt of notice of refusal or notice of non-delivery by the sending Party.

- 10. NON-DISCLOSURE/NON-COMPETITION.** Organization agrees to treat this Agreement confidentially and shall not disclose the terms contained herein except as required by law, including but not limited to the Ind. Code § 5-14-1.15 et seq. (Indiana Open Door Law) and Ind. Code § 5-14-3 et seq. (Indiana Access to Public Records Act) . Athlos hereby claims that release of its service and license fee pricing will cause substantial competitive harm to Athlos. Organization therefore agrees that it shall seek to withhold all information in this Agreement, or elsewhere in its possession, regarding

Organization's service or license fees, from any written request for information under the [insert state public record statute here]. In the event Organization believes that it is required to disclose or produce any such information, it shall provide notice to Athlos of its intent to disclose or produce such information at least ten (10) days prior to Organization's disclosure or production deadline. Organization further agrees that for a period of five years following the termination of this Agreement, Organization shall not implement a new program, or open a new school facility, which incorporates or attempts to incorporate any program which is confusingly or deceptively similar to the Athlos Program. In the event of a breach, Organization understands that such breach may result in immediate, great, irreparable and continuing harm and damage to Athlos for which there is no adequate remedy at law. In the event Organization breaches this Agreement, Athlos shall be entitled to obtain, from any court of competent jurisdiction, a temporary restraining order and preliminary and permanent injunctive relief, without the necessity of posting bond, to enforce the terms of this paragraph, in addition to any and all monetary damages allowed by law.

## **11. MISCELLANEOUS.**

- A. Governing Law/Venue. This Agreement shall be governed by, and construed in accordance with, the laws of the State of Indiana, and the venue for any legal dispute shall be Marion County, Indiana.
- B. Mediation. The Parties agree to negotiate in good faith in an effort to resolve any dispute related to this Agreement that may arise within forty-five (45) days of the other party's receipt of such notice of dispute. If the dispute cannot be resolved by negotiation, then the Parties will submit the dispute to mediation before resorting to binding arbitration or litigation and will equally share the costs of a mutually acceptable third-party mediator. This paragraph survives termination of this Agreement. This paragraph does not preclude a party from seeking equitable relief from a court of competent jurisdiction.
- C. Indemnification. To the extent permitted by law, each Party shall indemnify, defend, and hold harmless the other Party, as well as Board members, directors, officers, employees, agents and other representatives, from any and all manner of loss, cost, expense (including attorneys' fees and other costs and expenses of litigation, defense and appeal), damage, injury, liability, claims, actions and causes of action whatsoever arising from or in any way related to the Party's: (i) own negligent or willful acts or omissions; (ii) breach of this Agreement; or (iii) operation of its own responsibilities under this Agreement. Neither the execution of this Agreement by Organization nor any other conduct of any representative of Organization relating to the Agreement shall considered a waiver of governmental immunities available to Organization.
- D. Counsel Sought. Each Party acknowledges that (i) the Party was advised or represented by counsel in connection with the negotiation, preparation, revision and execution of this Agreement; (ii) before executing this Agreement, the Party discussed the Agreement with the Party's counsel and became fully informed of the



terms, contents, conditions and effect of this Agreement; (iii) the Party is legally competent, as well as fully qualified and authorized to execute this Agreement; (iv) in executing this Agreement, the Party is not relying on any warranty, statement, promise or representation of any kind that has been made to the Party by any other Party, or by legal counsel for any other Party or anyone acting for another Party in any capacity, except as expressly stated in this Agreement; (v) each Party expressly disclaims reliance upon any facts, promises, warranties, undertakings, or representations, whether express or implied, by any other Party, or its agents or legal counsel as consideration for this Agreement, except for the explicit provisions of this Agreement; (vi) the Party has relied solely on the Party's own judgment and/or the advice of the Party's counsel in executing this Agreement; (vii) the Party understands the terms, contents, conditions, and effect of this Agreement, and voluntarily accepts the Agreement in its entirety; and (viii) each Party has executed this Agreement of its own free will as a free and voluntary act, without any duress, coercion or undue influence exerted by or on behalf of any person or entity.

- E. Severability. Any provision of this Agreement which shall prove to be invalid, void or illegal shall in no way affect, impair or invalidate any other provision hereof and such other provision shall remain in full force and effect.
- F. Waiver. No waiver of any provision of this Agreement shall be deemed or shall constitute a waiver of any other provision. Nor shall such waiver constitute a continuing waiver unless otherwise expressly stated. This provision shall include, but not be limited to, any credit toward a Service and License Fee. Athlos, may at its discretion elect not to collect a Service and License Fee from time to time. The exercise of such discretion shall not constitute a waiver of Athlos' right to future Service and License Fees.
- G. Authority. To the extent that this Agreement is executed by a Party or Parties on behalf of an individual, corporation, governmental entity, trust, estate or other legal entity, such Party or Parties executing this Agreement represent that they have authority to act on behalf of the entities or individuals for which they purport to act and to bind those entities or individuals to the terms and conditions of this Agreement. Furthermore, as each Party is a legal entity, each Party acknowledges, represents, warrants and confirms that it has full and complete authorization and power to execute this Agreement in the capacity herein stated, and this Agreement is a valid, binding and enforceable obligation and does not violate any law, rule, regulation, contract or agreement enforceable against it.
- H. Entire Agreement. This Agreement contains the entire agreement between the Parties, but only as concerns the specific matters addressed herein. Furthermore, this Agreement supersedes any and all prior or contemporaneous agreements and any and all prior or contemporaneous negotiations, warranties, discussions or representations, whether oral or written, and this Agreement is subject to

modification, waiver, or addition only by means of a writing signed by the Party to be charged.

- I. Successors and Assigns. This Agreement is binding upon and inures to the benefit of the Parties and their respective successors, beneficiaries, administrators, and permitted assigns.
- J. Counterparts. This Agreement may be executed in any number of counterparts, each of which will be deemed an original, and all of which together will constitute one and the same instrument. This Agreement may be transmitted to the Parties by facsimile or other electronic means, the Parties may sign and return their respective signatures by facsimile or other electronic means, and such signatures transmitted by facsimile or electronically will be presumed valid, binding, and of the same force and effect as an original signature to this Agreement.

IN WITNESS WHEREOF, Organization and Athlos have caused this Agreement to be executed as of the day and year first above written.

**ATHLOS**

School Model Support, LLC

\_\_\_\_\_

*Signature*

Name: \_\_\_\_\_

Title: \_\_\_\_\_

**ORGANIZATION**

\_\_\_\_\_

\_\_\_\_\_

*Signature*

Name: \_\_\_\_\_

Title: \_\_\_\_\_

## Additional Information

The “term sheet” requested in the application document has components which are largely explained elsewhere in the charter application and in the above Master Service Agreement. The following is further identification on where some things are explained and additional information for items which have not been thoroughly developed in other parts of the application or in the terms of the service agreement:

### Relationship between the school governing board and the ESP

As seen in the organizational chart presented in Attachment 14, the board of directors at AAI is the governing authority for both the entity and the ESP. You can see that the ESP and executive director of the school are accountable to each other for management of day-to-day operations, program implementation, and planning/support services. Each month, the executive director and the ESP report to the governing board at their regularly scheduled board meeting. Weekly – and sometimes more often – the executive director, leadership staff, and ESP community for check-ins, virtual visits, site visits, and day-to-day management needs. Although the ESP helps to support the infrastructure for all management services, the governing board – as seen in the above service agreement – has final authority over decisions for the school. The board has the ability to hire and fire the ESP, has the authority to make decisions around programmatic and fiscal decisions for the school, and has the responsibility of working as the governing body for the school being managed by the ESP in collaboration with the executive director.

### Roles and Responsibilities

The contractual roles of the board and ESP are outlined in the draft Master Service Agreement. The role of the ESP is outlined throughout the body of the charter and contractually in the draft Master Service Agreement. The roles of the board are outlined in the *Executive Summary* and *Section I: Evidence of Capacity* at the beginning of this charter. The board also has sample committee annual to-do items that are being refined for the work ahead upon approval of the charter.

Lastly, the roles of the school staff are listed in the body of the charter, but the roles and descriptions of their job is not included. The following are job descriptions for each leadership role at Athlos Academy of Indiana. These job descriptions are templates with minimum requirements. The board at AAI will refine these descriptions with assistance from the ESP if requested to meet the needs of their market and compliance for each position at the school. Also included below are the board signature sheet and board member responsibility summary used with new board members.



# Athlos Academy

## INDIANA

### Executive Director Position Description

Dear prospective candidate,

Thank you for your interest in the Executive Director position at Athlos Academy of Indiana (AAI). The mission of AAI is to provide high quality educational opportunities for the whole child through three foundational pillars: Prepared Mind, Healthy Body, and Performance Character. The model is rooted in the belief that each pillar is intrinsically dependent on the strength of the other two and that the overall success of a child in college, career, and life is at its best advantage when supported by high quality programs in all three areas.

To best serve and support K-8 students in Southeastern Marion County, AAI is committed to finding an Executive Director who can relocate to the Indianapolis area, skillfully navigate a yearlong start-up process, help recruit and mentor a staff invested in whole child development, and implement a school model that fosters each student's critical-thinking skills, healthy lifestyle habits, and performance character traits. The school will open its doors to students in Fall 2018.

The ideal Executive Director candidate for AAI will be passionately committed to developing the whole child; professional, approachable, and a strong communicator, both internally with staff and externally with stakeholders; entrepreneurial, enthusiastic, creative and dedicated; a collaborative and innovative thinker and problem-solver; excellent at leveraging data to drive decision-making; skillful in motivating and leading staff to achieve educational goals while also remaining budget-conscious; and a strong organizational, operational and interpersonal leader.

This individual should also possess a Master's in Education Administration, or a related field, have at least 3-5 years of successful school leadership experience in an urban school setting, and hold an Indiana Principal Certificate and/or Education Administrator License. Leadership experience in a charter school is strongly preferred, as well as proven success in a school start-up process; staff management, training, and motivation; program implementation; fiscal and legal compliance; public relations and communications; and professionalism.

The Executive Director at AAI will be in a unique and exciting position to bring the first Athlos school to Indiana. We look forward to receiving your application and responding to any further questions you may have about AAI.

*-Athlos Academies, ESP*

## Executive Director Duties & Responsibilities

Startup Year Tasks	Staff Management	Academics	Operations	Public Relations	Professionalism
<p>1) Partners with Athlos Academies (ESP) to lead the startup process for AAI; tasks include, but are not limited to: board relations, staff recruitment and hiring, calendaring, school schedules, emergency plan development, development of daily protocols and procedures, budget management (both school and grant), PD/work plan planning, etc.</p> <p>2) Participates in regular trainings led by Athlos Academies (ESP) both virtually and on-site. Trainings include, but are not limited to: leadership training, deep dive into the Athlos educational model, PowerSchool training, school finance and back office processes, etc.</p> <p>3) Relocates to and leads community outreach efforts in Southeastern Marion County; leads student recruitment efforts.</p> <p>4) Visits other Athlos Academy schools around the country for a deeper dive into the pillar model and daily operations of Athlos schools.</p>	<p>1) Recruits, hires, and retains high quality teachers and staff, terminates when necessary</p> <p>2) Oversees professional development of all teachers and staff</p> <p>3) Observes all classes regularly; oversees and assesses the performance of all school employees.</p> <p>4) Holds employee evaluation conferences based on records of performance observations</p> <p>5) Ensures collaboration and team building among staff</p> <p>6) Manages conflicts and relations between school employees skillfully</p> <p>7) Oversees employee screening measures to ensure that each employee has undergone an appropriate background check.</p>	<p>1) Evaluates instructional program effectiveness; develops and enforces policies and procedures.</p> <p>2) Ensures implementation of instructional strategies, classroom management, and communication.</p> <p>3) Ensures effective, research-based professional development is provided and implemented.</p> <p>4) Monitors special projects accountability timelines and coordinates timely completion.</p> <p>5) Collaborates with staff for united school improvement plan.</p> <p>6) Monitors and analyzes student performance assessment data preparing reports as needed for various special projects (i.e., after school program, summer school).</p> <p>7) Oversees special education program implementation and compliance.</p> <p>8) Analyzes student achievement data, draws logical conclusions and prepares comprehensive reports.</p> <p>9) Holds and attends parent/teacher/student conferences, open houses, and other parent and community events</p>	<p>1) Abides by all state and federal laws that apply to charter schools and charter policy.</p> <p>2) Ensures there is proper documentation on operations of charter programs to develop accurate budget.</p> <p>3) Maintains fiscal control; report accurate fiscal information.</p> <p>4) Ensures smooth operation of school facilities, school finance and risk management, including appropriate procurement of insurance policies.</p> <p>5) Ensures school-wide compliance with all policies and procedures.</p> <p>6) Attends all required Governing Board and state meetings; attend other meetings and training that provide legal guidance.</p> <p>7) Participates in the school's annual fiscal audit and oversee the preparation of the school's Annual Budget, Annual Financial and Annual Program Reports.</p> <p>8) Ensures school safety by performing fire drills and other drills.</p> <p>9) Preparation of financial and statistical documents and reports.</p> <p>10) Ensures school facilities are managed effectively; oversees facilities to ensure maintenance provides a clean and safe school.</p>	<p>1) Establishes rapport with parents, students, school staff, and Athlos Academy Board of Directors.</p> <p>2) Coordinates with the school's parent organization to increase parental involvement within the school.</p> <p>3) Builds positive relations with state education departments, other charter schools, and school districts.</p> <p>4) Works pro-actively to maintain community partnerships and positive public relations that showcases the school's success.</p>	<p>1) Upholds and enforces board policy, administrative procedures, and school rules and regulations, and be supportive of such in your communications with students, parents, and the public at large.</p> <p>2) Works cooperatively with parents and teaching mentors to strengthen the educational program.</p> <p>3) Oversees overall school operations.</p> <p>4) Promotes and maintains a positive and effective school climate by ensuring that all interactions with staff, students, parents, and the public at large are prompt, efficient, helpful and friendly.</p> <p>5) Maintains regular communication with Athlos Academies, ESP; serves as the face of Athlos Academies in the JP community</p>

**Position:** Assistant Administrator

**Reports to:** Lead School Administrator

**Salary Range:**

**Minimum Qualifications Required:**

**Education:** Master's in Education Administration or related field.

**Experience Required:** Possesses at least 3-5 years of successful teaching and/or school leadership experience in an urban school setting.

**Certification Required:** Valid Teaching License or Education Administrator License.

**Job Duties:**

1. Assists the Lead School Administrator in providing leadership and support on adopting research-proven, standards-based instructional practices.
2. Leads teachers in creating coherency in instructional practices and routines within the school.
3. Works with teachers to interpret data and create action plans for school improvement.
4. Assists teachers in planning and training for data-driven instruction.
5. Ensures that teachers are implementing special education services in accordance with federal and state law.
6. Assists the Lead School Administrator in recruiting high performing teachers and staff.
7. Develops, coaches, and manages teacher performance to create a high performing team.
8. In collaboration with staff, designs and executes a successful model of professional development for faculty.
9. In collaboration with the Lead School Administrator, oversees the fiscal and business operations of the school.
10. Demonstrates competence in the core areas identified in \_\_\_\_\_.

**Legal References:**

**Position:** Administrative Assistant

**Reports to:** Executive Director

**Salary Range:**

**Minimum Qualifications Required:**

**Education:** Bachelor's Degree required.

**Experience Required:** Registrar's office or other enrollment management areas experience preferred.  
Bilingual preferred.

**Certification Required:** none

**Job Duties:**

1. Develops, maintains office forms and procedures and assists with administrative tasks as requested by the Executive Director.
2. Develops and implements office procedures, routines, and filing systems as necessary.
3. Provides information on school services and programs to parents/guardians, the public, and other staff.
4. Maintains and consistently updates social media accounts and actively creates posts to assist in student recruitment.
5. Coordinates and promotes informational meetings for families and public.
6. Professionally represents the school in interactions with parent/guardians, community, staff, and students.
7. Assists with the interpretation of operational policies and procedures.
8. Relates updates to Board of Directors monthly.
9. Other duties as assigned.

**Legal References:**

**Position:** Athletic Performance Coach

**Reports to:** Lead School Administrator

**Salary Range:**

**Minimum Qualifications Required:**

**Education:** Bachelor's Degree in Physical Education, Kinesiology, Exercise Science or related field.

**Experience Required:** Teaching experience preferred. Candidates with experience working in pediatric athletic development particularly with K-12 student-athletes. Experience in participation with competitive high school or college athletics is a plus. APC's must be physically able to execute the activities that make up the Athlos Athletic Curriculum.

**Certification Required:** Valid teaching certificate with physical education endorsement, or willing to sit for their certification exam within the first year of hire. Possessing a CSCS certification from National Strength and Condition Association or other exercise science certification is a plus.

**Job Duties:**

1. Implements the Athlos Athletic Curriculum to help facilitate growth in students.
2. Appropriate scale activities to student's physical capabilities.
3. Being an active presence in the school community.
4. Plans, prepares, and delivers instruction that engages students and provides academic growth.
5. Ensures student growth and achievement in accordance with grade level.
6. Models the Athlos culture.
7. Responsible for tracking student attendance, behavioral issues, and classroom events.
8. Participates in regular professional development.
9. Communicates with parents and the community professionally.
10. Communicates regularly with school leadership and other faculty to maximize instructional activities.
11. Participates in the school's professional learning community to enhance learning objectives.
12. Meets professional obligations by honoring schedules and deadlines.
13. Demonstrate the standards for effective practices of teachers in \_\_\_\_\_.
14. Any other assigned duties.

**Legal References:**



**Position:** Instructional Coach

**Reports to:** Lead School Administrator and Director of Curriculum and Instruction

**Salary Range:**

**Minimum Qualifications Required:**

**Education:** Bachelors in Education + 5 years educational experience OR Masters in Education.

**Experience Required:** 5 years of educational experience preferred (required if only Bachelors), experience in research-based instructional practices.

**Certification Required:** Hold a valid Minnesota Teaching Certificate.

**Job Duties:**

1. Implements a collaborative coaching and learning approach.
2. Assists new teachers in a collaborative model of observation, conversation, and lesson demonstration.
3. Models effective and differentiated instruction.
4. Provides individualized, classroom-based coaching, and supports implementation of good instructional practices.
5. Facilitates professional collaborative groups to review effective practice and analyzes student data.
6. Facilitates grade-level teams to discuss implementation of effective content, skills, and problem-solving instruction.
7. Provides comprehensive and balanced training in and across given subject areas and curricular areas.
8. Participates in Professional Development for coaches, including peer observations, professional research, and inquiry sessions.
9. Assists teachers in aligning their teaching with appropriate standards, curriculum, and assessments.
10. Works collaboratively with other Instructional Guides, curriculum specialists, and district specialists.

**Position:** Regular Education Teacher

**Reports to:** Lead School Administrator

**Salary Range:**

**Minimum Qualifications Required:**

**Education:** Minimum Bachelor's Degree.

**Experience Required:** Teaching experience preferred, but not required.

**Certification Required:** Teacher certification for assigned subjects.

**Job Duties:**

1. Plans, prepares and delivers instruction that engages students and provides academic growth.
2. Ensures student growth and achievement in accordance with grade level.
3. Models the Athlos culture.
4. Responsible for tracking student attendance, behavioral issues and classroom events.
5. Participates in regular professional development.
6. Communicates with parent/guardians and the community professionally.
7. Communicates regularly with school leadership and other faculty to maximize effective instructional activities.
8. Participates in the school's professional learning community to enhance learning objectives.
9. Meets professional obligations by honoring schedules and deadlines.
10. Demonstrate the standards for effective practices of teachers in Minn. Rules Part 8710.2000.
11. Any other assigned duties.

**Legal References:**

**Position:** Elementary Art Teacher

**Reports to:** Lead School Administrator

**Salary Range:**

**Minimum Qualifications Required:**

**Education:** Minimum Bachelor's Degree.

**Experience Required:** Teaching experience preferred.

**Certification Required:** A valid teaching license, or the ability to obtain such.

**Job Description:**

The ideal candidate embraces the Pillars of Prepared Mind, Healthy Body, and Performance Character, and welcomes the partnership between the school and the ESP. The educational philosophy at Athlos supports active learning strategies, project based learning, and a culture of excellence. The school is family and community focused and a growth oriented mindset is fostered in the classroom and in the workplace.

The Art Teacher is responsible for planning and implementing appropriate, standards based, creative, and engaging art lessons for children in grades K-6. When possible, collaboration with regular classroom teachers and cross-content lessons are encouraged. The ideal candidate has a passion for art, is dependable, creative, enthusiastic, professional, and has the ability to build strong rapport with students and parents.

**To Apply:**

Athlos Academy is now accepting applications for an Elementary Art Teacher.

Please submit a resume, references/recommendations, and a copy of your teaching certificate to

\_\_\_\_\_ Subject Line: Elementary Art Teacher.

**Legal References:**

**Position:** Middle School Language Arts Teacher

**Reports to:** Lead School Administrator

**Salary Range:**

**Minimum Qualifications Required:**

**Education:** Minimum Bachelor's Degree.

**Experience Required:** Teaching experience preferred, but not required.

**Certification Required:** Secondary Certification, ELA Endorsement.

**Job Duties:**

1. Teaches 6th, 7th and 8th grade ELA courses.
2. Plans, prepares and delivers instruction that engages students and provides academic growth.
3. Ensures student growth and achievement in accordance with grade level.
4. Models the Athlos culture.
5. Responsible for tracking student attendance, behavioral issues and classroom events.
6. Participates in regular professional development.
7. Communicates with parent/guardians and the community professionally.
8. Communicates regularly with school leadership and other faculty to maximize effective instructional activities.
9. Participates in the school's professional learning community to enhance learning objectives.
10. Meets professional obligations by honoring schedules and deadlines.
11. Demonstrate the standards for effective practices of teachers in Utah Admin R277-530.
12. Any other assigned duties.

**Legal References:**

**Position:** Middle School Math Teacher

**Reports to:** Lead School Administrator

**Salary Range:**

**Minimum Qualifications Required:**

**Education:** Minimum Bachelor's Degree.

**Experience Required:** Teaching experience preferred, but not required.

**Certification Required:** Secondary Certification, Mathematics Endorsement Level 2 or higher.

**Job Duties:**

1. Teaches 6th, 7th, and 8th grade Mathematics.
2. Plans, prepares and delivers instruction that engages students and provides academic growth.
3. Ensures student growth and achievement in accordance with grade level.
4. Models the Athlos culture.
5. Responsible for tracking student attendance, behavioral issues and classroom events.
6. Participates in regular professional development.
7. Communicates with parent/guardians and the community professionally.
8. Communicates regularly with school leadership and other faculty to maximize effective instructional activities.
9. Participates in the school's professional learning community to enhance learning objectives.
10. Meets professional obligations by honoring schedules and deadlines.
11. Demonstrate the standards for effective practices of teachers in Utah Admin R277-530.
12. Any other assigned duties.

**Legal References:**

**Position:** Middle School Science Teacher

**Reports to:** Lead School Administrator

**Salary Range:**

**Minimum Qualifications Required:**

**Education:** Minimum Bachelor's Degree.

**Experience Required:** Teaching experience preferred, but not required.

**Certification Required:** Secondary Certification, Middle Level Science.

**Job Duties:**

1. Teaches 6th grade Science, 7th grade Integrated Science, and 8th grade Integrated Science.
2. Plans, prepares and delivers instruction that engages students and provides academic growth.
3. Ensures student growth and achievement in accordance with grade level.
4. Models the Athlos culture.
5. Responsible for tracking student attendance, behavioral issues and classroom events.
6. Participates in regular professional development.
7. Communicates with parent/guardians and the community professionally.
8. Communicates regularly with school leadership and other faculty to maximize effective instructional activities.
9. Participates in the school's professional learning community to enhance learning objectives.
10. Meets professional obligations by honoring schedules and deadlines.
11. Demonstrate the standards for effective practices of teachers in Utah Admin R277-530.
12. Any other assigned duties.

**Legal References:**

**Position:** Middle School Social Studies Teacher

**Reports to:** Lead School Administrator

**Salary Range:**

**Minimum Qualifications Required:**

**Education:** Minimum Bachelor's Degree.

**Experience Required:** Teaching experience preferred, but not required.

**Certification Required:** Secondary Certification, Social Studies Composite preferable.

**Job Duties:**

1. Teaches 6th grade Utah History and 8th Grade United States History I.
2. Plans, prepares and delivers instruction that engages students and provides academic growth.
3. Ensures student growth and achievement in accordance with grade level.
4. Models the Athlos culture.
5. Responsible for tracking student attendance, behavioral issues and classroom events.
6. Participates in regular professional development.
7. Communicates with parent/guardians and the community professionally.
8. Communicates regularly with school leadership and other faculty to maximize effective instructional activities.
9. Participates in the school's professional learning community to enhance learning objectives.
10. Meets professional obligations by honoring schedules and deadlines.
11. Demonstrate the standards for effective practices of teachers in Utah Admin R277-530.
12. Any other assigned duties.

**Legal References:**

**Position:** Paraprofessional

**Reports to:** Office Manager

**Salary Range:**

**Minimum Qualifications Required:**

**Education:** High school diploma or GED and minimal experience working with school aged children, or equivalent combination of education and experience.

**Experience Required:** General knowledge of the practices, methods and techniques used in the teaching population; thorough skill in the use of classroom and instructional equipment; ability to maintain files and information; ability to establish and maintain effective working relationships with students, teachers, parents, associates, administration and the general public.

**Certification Required:** Associates/Technical degree preferred.

**Job Duties:**

1. Provides supplemental instruction for students; encourages and motivates students to complete assignments.
2. Assists Teacher(s) in performing specific duties as assigned, or undertaking specialized tasks.
3. Works with individuals or small groups reinforcing material introduced by the Teacher.
4. Completes required records and forms under the supervision of the Teacher.
5. Assists with group activities.
6. Guides independent study and other work assigned by the Teacher.
7. Monitors student behavior and advises Teacher on student issues.
8. Interprets needs for attendance issues, teacher concerns about students and parent questions.
9. Participates in meetings, in-service training programs and workshops as required.
10. Assists the Teacher in setting up and tearing down classroom before and after special events.
11. Performs other duties as assigned.



**Position:** Substitute Teacher

**Reports to:** Executive Director

**Salary Range:**

**Minimum Qualifications Required:**

**Education:** Minimum Bachelor's Degree.

**Experience Required:** Teaching experience preferred, but not required.

**Certification Required:** Valid teacher certification.

**Job Duties:**

1. Plans, prepares and delivers instruction that engages students and provides academic growth.
2. Ensures student growth and achievement in accordance with grade level.
3. Models the Athlos culture.
4. Responsible for tracking student attendance, behavioral issues and classroom events.
5. Communicates with parent/guardians and the community professionally, if necessary.
6. Communicates regularly with school leadership and other faculty to maximize effective instructional activities.
7. Meets professional obligations by honoring schedules and deadlines.
8. Demonstrate the standards for effective practices of teachers in \_\_\_\_\_.
9. Any other assigned duties.

**Legal References:**

**Position:** Guidance Counselor

**Reports to:** Lead School Administrator

**Salary Range:**

**Minimum Qualifications Required:**

**Education:** Master's degree in Counseling from an institution of higher education that is regionally accredited by an accrediting agency, as recognized by the Minnesota Office of Higher Education.

**Experience Required:** Minimum 3 years' experience in the field

**Certification Required:** Complete the approved preparation program in school counseling

**Job Duties:**

1. Uses data to discuss, develop, and continually improve the school counseling program.
2. Communicates the objectives of the counseling program to administration, teachers, students, parent/guardians, and the Athlos Academy Governing Board.
3. Manages the school's referral process as part of the school's comprehensive school counseling program.
4. Helps develop individualized program plans for each student.
5. Ensures the program is meeting applicable standards; advises on improvements to meet policy requirements.
6. Implements prevention-oriented activities to meet student needs and goals of the program.
7. Provides individual and group counseling to students with identified concerns and needs.
8. Uses assessment tools and techniques to structure individual/group counseling services.
9. Works with parent/guardians to teach students life skills (education, career, and life planning).
10. Collaborates with administration and others on counseling plans; communicate plans effectively with students and parent/guardians.
11. Demonstrates the knowledge and skills listed in Minn. Rules Part 8710.6400, subp. 3.

**Legal References:**

**Position:** Kitchen Manager

**Reports to:** Lead School Administrator and Director of Nutrition

**Salary Range:**

**Minimum Qualifications Required:**

**Education:** High school diploma or GED equivalent

**Experience Required:** One year of public school food service experience or three years of food service operation management.

**Certification Required:** Completion of an accredited sanitation course and maintenance of certification. Completion of manager training program.

**Job Duties:**

1. Conducts operational management 55% and production management 45% of the work week.
2. Prepares and maintains records reflecting an accurate report of planned meals, food produced, and food discarded.
3. Maintains accurate on-site reports of daily and monthly financial, production, and activity records.
4. Assists the Director of Nutrition in ensuring that sanitation and safety practices comply with federal, state, and local law.
5. Inputs work orders for equipment maintenance needs and ensure they are completed in a timely manner.
6. Prepares and reviews daily work schedules to ensure proper and efficient scheduling of employees.
7. Manages employees on the school site and promotes employee growth, efficiency, morale, and teamwork.
8. Provides leadership to ensure school meals are served in a pleasant environment by courteous staff.
9. Maintains daily deposits and cash receipt documentation; management and reconciliation of cash register.
10. Responsible for presenting quality food in an attractive manner.

**Legal References:**

**Position:** Kitchen Staff

**Reports to:** Kitchen Manager

**Salary Range:**

**Minimum Qualifications Required:**

**Education:** High school diploma or GED equivalent

**Experience Required:** One year of public school food service experience.

**Certification Required:** Completion of an accredited sanitation course and maintenance of certification.

**Job Duties:**

1. Prepares and maintains records reflecting an accurate report of planned meals, food produced, and food discarded.
2. Maintains accurate on-site reports of daily and monthly financial, production, and activity records.
3. Assists the Kitchen Manager in ensuring that sanitation and safety practices comply with federal, state, and local law.
4. Inputs work orders for equipment maintenance needs and ensure they are completed in a timely manner.
5. Promotes employee efficiency, morale, and teamwork.
6. Ensure school meals are served in a pleasant environment by courteous staff.
7. Maintains daily deposits and cash receipt documentation; management and reconciliation of cash register.
8. Responsible for presenting quality food in an attractive manner.

**Legal References:**

**Position:** Maintenance/Staff

**Reports to:** Director of Facilities and Lead School Administrator

**Salary Range:**

**Minimum Qualifications Required:**

**Education:** High school diploma or GED equivalent required

**Experience Required:** none

**Certification Required:** none

**Job Duties:**

1. Cleans areas assigned, including but not limited to vacuuming, shampooing, and scrubbing, as necessary.
2. Keeps walks, parking area, grounds, and entrances clear and clean.
3. Receives and processes work orders associated with facility maintenance.
4. Unlocks doors and windows, turns on lights, and prepares facility for instruction.
5. Tends to issues with snow and ice including clearing sidewalks and hallways.
6. In collaboration with the Director of Facilities, conducts regular safety audits of facility, including playground & athletic areas.
7. Operates and maintains lawn mowers, sweepers, and other organizational cleaning and lawn care equipment.
8. Maintains campus grounds and athletic facilities.
9. Be courteous and responsive to staff and student facility needs.
10. Tracks and orders custodial and facility supplies as needed.

**Position:** School Nurse

**Reports to:** Executive Director

**Salary Range:**

**Minimum Qualifications Required:**

**Education:** Bachelors of Science in Nursing

**Experience Required:** 2 years of nursing experience preferred; experience with children preferred

**Certification Required:** Licensed nurse in Minnesota; AED Certification; Certification as State Screener for Vision, Hearing, Spinal, and Risk Assessment for Type 2 Diabetes.

**Job Duties:**

1. Establish and maintain a comprehensive school health program.
2. Supervise, monitor, and evaluate any assistants and delegate responsibilities to assistive personnel.
3. Provide educational activities in areas of nursing tasks, health, and communication skills.
4. Assist in coordinating a school-wide wellness program.
5. Provide emergency care to ill or injured staff and students.
6. Develop Individualized Health Plans with specific nursing interventions.
7. Collaborate with staff, parents, and community to maximize delivery of health services.
8. Assess the health and development of students via evaluations and clear documentation.
9. Provide health counseling; promote health education opportunities.
10. Attend staff meetings for department of Health Services and Special Education as directed.

**Position:** Office Manager

**Reports to:** Lead School Administrator

**Salary Range:**

**Minimum Qualifications Required:**

**Education:** Associates Degree required, Bachelor's Degree preferred

**Experience Required:** Community liaison experience and bilingual preferred

**Certification Required:** First Aid/CPR.

**Job Duties:**

1. Coordinates the office operations of the campus.
2. Develops, maintains office forms and procedures and assists with administrative tasks as requested by the Lead School Administrator.
3. Develops and implements office procedures, routines, and filing systems as necessary.
4. Provides information on school services and programs to the public and department staff.
5. Assists in the compilation of data for the PEIMS director and with the submission of facility work orders.
6. Completes special projects as assigned by the Lead School Administrator.
7. Professionally represents the school in interactions with parent/guardians, community, staff, and students.
8. Assists with the interpretation of operational policies and procedures.
9. Manages campus supply inventory, oversees staffing and front office departmental expenditures and budget.
10. Acts as a liaison between the school and the community.

**Position:** Office Staff

**Reports to:** Office Manager

**Salary Range:**

**Minimum Qualifications Required:**

**Education:** High School Diploma, Associates Degree preferred

**Experience Required:** Some experience in an office setting and bilingual preferred

**Certification Required:** First Aid/CPR

**Job Duties:**

1. Performs general office duties, including answering phones, taking messages, and greeting the public.
2. Assists with copying of documents, filing, sorting, and handling incoming and outgoing mail.
3. Logs receipt of any checks or cash receipts and assists with preparation of the deposit.
4. Follows and administers medical protocols for students and provides first aid.
5. Assists with maintaining accurate student records in printed and electronic format.
6. Troubleshoots office machinery (copy, fax, postage meter, phones, etc.)
7. Coordinates the purchase of maintenance, and usage of office supply inventory.
8. Assists with volunteer programs and organizations (e.g. preparing materials for PTO, maintain volunteer list, etc.)
9. Acts as a liaison between the school and the community when serving the public in the office.
10. Other duties as assigned.



**Position:** Registrar

**Reports to:** Lead School Administrator

**Salary Range:**

**Minimum Qualifications Required:**

**Education:** Bachelor's Degree required.

**Experience Required:** Registrar's office or other enrollment management areas experience preferred.  
Bilingual preferred.

**Certification Required:** none

**Job Duties:**

1. Develops, maintains office forms and procedures and assists with administrative tasks as requested by the Lead School Administrator.
2. Develops and implements office procedures, routines, and filing systems as necessary.
3. Provides information on school services and programs to the public and department staff.
4. Assists in the compilation of data for the PEIMS director and with the submission of facility work orders.
5. Professionally represents the school in interactions with parent/guardians, community, staff, and students.
6. Assists with the interpretation of operational policies and procedures.
7. Manages campus supply inventory, oversees staffing and front office departmental expenditures and budget.
8. Other duties as assigned.



**I. PRIMARY ROLES OF THE GOVERNING BOARD**

- Ensure high academic achievement.
- Ensure all programs and operations are faithful to the Charter, Mission, and Vision.
- Ensure that the school continues to be a viable organization.

**II. OTHER ROLES AND RESPONSIBILITIES**

**Keep the Mission and Vision Clearly in Focus**

- Periodically review the mission statement which serves as a guide to organizational planning, board, and staff decision-making.
- Use established measures to connect school performance to the mission and vision to promote high achievement and avoid mission drift.
- Understand and support the mission and vision of the school.

**Provide for High-Quality School Management**

- Define the boundaries between Management (the Lead School Administrator's job) and Governance (the Governing Board's job) as it defines the Governing Board's job description.
- Recruit, interview, and contract with a qualified and experienced Lead School Administrator.
- Minimally provide annual written performance reviews for the Lead School Administrator.
- Take action if/when individual board members overstep or misunderstand their roles in relationship to the administrator and to the separation of management and governance.

**Ensure Effective Organizational Planning**

- Develop a strategic plan with the administrator that includes measurable goals consistent with the charter, reflective of current school-wide data, and aligned with the expectations of the school's authorizer.

**Ensure Adequate Resources**

- Approve fundraising targets and goals.
- Assist in carrying out development plan.
- Make an annual gift at a level that is personally meaningful.

### **Manage Resources Effectively**

- Approve the annual budget.
- Monitor budget implementation through regular financial reports.
- Approve accounting and personnel policies.
- Provide for an independent annual audit by a qualified CPA.
- Ensure adequate insurance exists to cover students, staff, visitors, the governing board, and school assets.

### **Determine, Monitor and Strengthen the Programs and Services of the School**

- Assure programs and services are consistent with the Charter, Vision, and Mission.
- Approve measurable organizational outcomes.
- Monitor progress in achieving the outcomes and goals.

### **Enhance the School's Public Standing**

- Serve as ambassadors, advocates and community representatives of the school.
- Ensure that no board member represents him/herself as speaking on behalf of the governing board unless specifically authorized to do so.
- Provide for a written annual report and public "State of the School" presentation that details the school's progress and status.

### **Ensure Legal and Ethical Integrity and Maintain Accountability**

- Establish policies to guide the school's board members and staff.
- Develop and maintain adequate personnel policies and procedures.
- Adhere to the provisions of the school's bylaws and articles of incorporation.
- Adhere to local, state, and federal laws and regulations that apply to the school.

### **Commit to Continuous Improvement in Governance Practices**

- Define board membership needs in terms of skills, experience, and diversity.
- Recruit board nominees accordingly.
- Provide for new board member orientation.
- Participate in ongoing board development (ongoing and annual).
- Provide for an annual board performance assessment.

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Each board member is responsible for actively participating in the work of the Athlos Academy Governing Board and encouraged to enhance the school culture. Each board member is expected to affirm and strive to fulfill the following performance expectations:

1. Believing in and being an active ambassador for the values, mission, and vision of the school.
2. Modeling habits that contribute to the effective operations of the Governing Board as a whole, including:
  - a. Making decisions for the school's good, not the agenda of any individual or group.
  - b. Supporting board decision once consensus is achieved.
  - c. Working actively in board governance, rather than management.
3. Appropriately preparing for and regularly attending board/ committee meetings.
4. Staying informed about the school and its issues.
5. Using personal and professional contacts and expertise for the benefit of the school.
6. Serving as a committee member or Chair.
7. Contributing 5-10 hours a month toward board service.

I, \_\_\_\_\_, understand that as a member of the Athlos Academy Governing Board, I have a legal and moral responsibility to ensure that the organization does the best work possible in pursuit of its goals. I believe in the purpose and the mission of the organization, and I will act responsibly and prudently as its steward. I will avoid being placed in a position of conflict of interest and will refrain from using my board position for personal or partisan gain. I pledge to take no private action that will compromise the board or school and I will respect the confidentiality of information that is privileged under applicable laws. I have read, understand, and am willing to comply with the roles and responsibilities of board members.

In turn, the school will be responsible to me in several ways. The school will ensure that I receive monthly financial statements and regular updates of the school's activities. The school will provide me with regular student achievement data and opportunities for my professional development as a board member. The Lead School Administrator will ensure that I receive information important to my decision-making in a straightforward and timely manner. The Governing Board and the Lead School Administrator will work with me in good faith toward the achievement of the school's goals.

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*Signed*

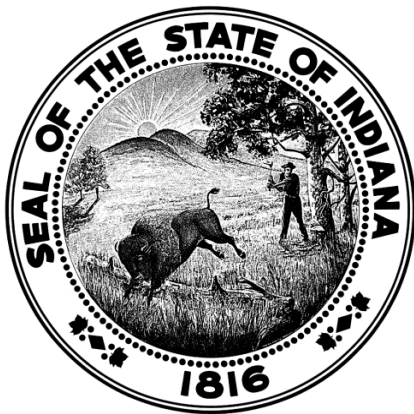
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*Dated*

State of Indiana  
Office of the Secretary of State  
Certificate of Authority  
of  
**SCHOOL MODEL SUPPORT, LLC**

I, CONNIE LAWSON, Secretary of State, hereby certify that an Application for Certificate of Authority of the above Foreign Limited Liability Company has been presented to me at my office, accompanied by the fees prescribed by law and that the documentation presented conforms to law as prescribed by the provisions of the Indiana Business Flexibility Act.

NOW, THEREFORE, with this document I certify that said transaction will become effective Monday, August 28, 2017.



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 28, 2017

*Connie Lawson*

CONNIE LAWSON  
SECRETARY OF STATE

201708281211586 / 7685625

To ensure the certificate's validity, go to <https://bsd.sos.in.gov/PublicBusinessSearch>

## Attachment 4: Decision Making Authority

### Governance and Operational Structure

Function	Governing Board	ESP	School
<p><b>Performance Goals</b></p>	<p>Performance goal development will be accepted or moved to be adjusted by the Chair and members of the Academic Committee. The school leadership and ESP will work with the governing board to understand, share development processes, etc. throughout the year (at minimum at monthly meetings). Each month the local board will hear a report of the progress monitoring of these goals. Quarterly the local board will hear results from benchmarks to have data for decision making. Bi-annually the local board will receive a more thorough report with potential adjustments to performance goals based on ESP and school leader bi-annual and end of year review.</p>	<p>The ESP will work with the governing board and school leader to manage the performance goals set forth for the school by the leadership. The ESP will also weave these goals into professional development plans for the year in collaboration with school leadership. These plans will be presented and reported to the local governing board. The ESP will be contracted to assist and collaborate in development of performance goals with school leadership as requested – at minimum to adjust and include in highly effective professional development needs.</p>	<p>The school leader will have autonomy to develop and design performance goals. The ESP will provide templates, review, and development support as requested by leadership. The school leader will present performance goals to the governing board and ESP. The ESP will work with governing board and school leader to ensure goals align with the overall mission and vision.</p>
<p><b>Curriculum</b></p>	<p>The local board will govern decisions and monitor/evaluate curricular deliverables as based on the MSA contract with the ESP. The ESP will work with the board and school leadership to develop a site-specific evaluation tool of curricula being used at the school for reporting purposes.</p>	<p>The ESP will be responsible for planning, supporting the ordering of, and monitoring the cost projects for curriculum. The ESP will also, as per the MSA, be responsible for curricula alignment with state standards, professional development for implementation of curricula, and</p>	<p>The school leader will have ultimate decision making on the curricular options that will be used to foster highly effective learning at the Athlos school. The school leader will make decisions about resource allocation for curricular choice and for staff needs to</p>

Function	Governing Board	ESP	School
		reporting of curricula needs/progress to the governing board.	support curricular choices at the school.
<b>Professional Development</b>	The local board will receive reports at monthly board meetings about professional development (PD) as appropriate. The board will also govern decisions surrounding funding for PD for the school in collaboration with planning needs and justification evidence from ESP and school leader.	The ESP is responsible for planning, developing, and implementing PD. The ESP will work with the Academic Committee and school leader to map appropriate PD into the yearly calendar and budget.	The school leader will collaborate with the ESP to design and map PD needs. The school leader will decide, with approval of the governing board, what the PD will look like for the year, what the needs are, and what resources are needed for the plan.
<b>Data Management and Interim Student Assessments</b>	The school leader and ESP will report data and assessment information at monthly meetings. This reporting will be governed consistently throughout the year. The role of the board is to govern decisions about how to improve process and achievement based on analysis of evidence provided by the school leader and ESP in reporting. Quarterly checks and bi-annual thorough review of this data with the Academic Committee will be most important for determining governing decisions.	The ESP is responsible for managing data with a member of the school staff. This data should be accessible for reporting throughout the school year to the governing board. This data will be analyzed regularly by the ESP for tailoring needs to fit PD requirements for the school faculty and staff. The ESP will project a needs assessment bi-annually (at least) to support the school leader and governing board using this data as evidence. ESP will make decisions to support overall student success academically in collaboration with the school leader and governing board.	The school leader will manage school faculty and staff for data processing and collection. The school leader will be responsible for decisions surrounding the needs of the school for success based on data reporting and will plan to implement day-to-day needs for instructional coaching and staff development to ensure a student-centered approach.
<b>Grade Level Promotion Criteria</b>	The governing board will review promotion and graduation processes. The governing board will review and adopt student promotion policies accordingly.	The ESP will research and provide a sample student promotion process aligned to state requirements. The ESP will work with local educational stakeholders to determine the best	The school leader will work with parents, teachers, and students to convey the elements of the student promotion process. The school leader will also ensure that through

Function	Governing Board	ESP	School
		<p>criteria for the school. The ESP will assist the governing board with draft policies for review that outline student promotion.</p>	<p>Professional Learning Communities and teacher professional development time that each student is tracked accordingly within the identified promotion criteria. This ensures each student that needs additional supports towards promotion can receive academic intervention if needed.</p>
<b>Culture</b>	<p>The governing board will make hiring and firing decisions for staff and leadership positions at the school. Qualification decisions will be approved by the governing board and a part of that qualification will be for cultural fit for the Athlos model and school. Governing decisions will also include partnerships, community involvement, day-to-day impacts, and any concerns regarding the culture at the school. The governing board will also work with the ESP to be sure the model is being supported with the partnership to improve and mentor Athlos school culture.</p>	<p>The ESP will provide the board and school leadership/staff with the Athlos model and all training necessary to support cultural understanding for implementation. The ESP will have authority to report on any concerns and be present in person at the school to assist if needed in developing school culture.</p>	<p>The school leader will work with the ESP and governing board for cultural planning and development needs to support school culture. The school leader will control day-to-day needs assessments and coaching to promote and mentor Athlos culture. Decisions for development and support needs will be presented to the board by the leadership team.</p>
<b>Budgeting, Finance, and Accounting</b>	<p>The governing board will receive financial reporting for the school leader at monthly board meetings. The Finance Committee will be committed to governing a sound budget that keeps the school operating at a revenue with a conservative overall budget. The</p>	<p>The ESP will provide the governing board and school leader with a 0-5 year conservative budget projection. The ESP will manage this document and activity with the governing board's finance committee for the life of the school.</p>	<p>The school leader will work with ESP to continuously monitor and manage the budget and accounting needs of the school. Daily decisions will be the responsibility of the school leader and collaboration on monthly reporting will be planned</p>



Function	Governing Board	ESP	School
	governing board will make sure this budget is healthy, sound, and projected for 6 years.		by the school leader. Projection decisions and future planning will be done by the school leader. Contract decisions for vendors, etc. will be at the discretion of the school leader with reporting and ultimate authority from the governing board.
<b>Student Recruitment</b>	The governing board will work with the ESP for their contract deliverable of support (both financial and human capital) for recruitment. The ESP will present a plan to be approved by the governing board and will report at monthly board meetings to share enrollment data, recruitment milestones, and deliverable compliance. Once student enrollment is met, the governing board will continue to monitor the ESP and school staff to ensure that all available seats are back filled and that all data is current to retain re-enrollment rates for the subsequent years.	The ESP will train the governing board and school leader to implement the local recruitment effort with assistance from ESP staff. The ESP will adjust and manage student enrollment for the life of the school as stated as a deliverable in the MSA.	The school leader will have authority over recruitment needs and goals. The school leader will collaborate with ESP to work with grassroots efforts for recruitment and have control over local needs for the school recruitment efforts. The school leader will manage continued enrollment efforts at the school and be responsible for reporting structures.
<b>School Staff Recruitment and Hiring</b>	The governing board will work with the ESP for their contract deliverable of support (both financial and human capital) for recruitment. The ESP will present a plan to be approved by the governing board and will report at monthly board meetings to share hiring recommendations in collaboration with	The ESP will work with the governing board and school leader to provide support in national teacher and staff recruitment. The ESP will manage job postings and outreach/marketing for these efforts.	The school leader will conduct interviews for highly qualified candidates, make ultimate hiring decisions with the governing board, and will be responsible for building a staff culture that will prove to bring student success.

Function	Governing Board	ESP	School
	<p>the school leader. The governing board will make sure the ESP is compliant with MSA agreement for autonomy of school leader to make ultimate hiring decisions for staff with the approval of the board.</p>		
<p><b>HR Services (payroll, benefits, etc.)</b></p>	<p>The role of the board will be to monitor data monthly as reported by the school leader and ESP to make decisions that may impact any budgetary or resource needs.</p>	<p>The ESP will be the HR service for the school. The ESP will work with a data reporting system at the school for appropriate staff to utilize for management and reporting structures. The ESP will report to the governing board any needs based on HR issues for the life of the school.</p>	<p>The school leader will monitor staff at ESP and the local school who are in charge of HR. School leader will use access for analysis of information to guide decision making at the school pertaining to HR needs.</p>
<p><b>Development</b></p>	<p>The role of the board may be to participate in fundraising events or coordinate them with the community relations (CR) committee. The CR committee will be responsible for maintaining a pool of grassroots individuals affiliated with the school to assist in planning and maintenance of any development/fundraising needs. The governing board will make decisions approving these activities and their mission driven purpose throughout the life of the school.</p>	<p>The ESP will provide human capital resources if required for any development/fundraising efforts. The ESP will provide support to the governing board as needed for decision making regarding choices of, and plans for, development and fundraising as set forth by the school leader.</p>	<p>The school leader will work collaboratively to bring forth ideas, needs, and human capital for development and fundraising needs. The school leader will work with the ESP and governing board to execute these needs.</p>
<p><b>Community Relations</b></p>	<p>The role of the board may be to participate in fundraising events or coordinate them with the community relations (CR) committee. The CR Committee will be responsible for</p>	<p>The ESP will be responsible for support in developing and designing community relations partnerships, management of these partnerships and outreach efforts. This may include decisions for</p>	<p>The school leader will be responsible for collaboration with and reporting of Community Relation needs with the ESP. The school leader will approve and be</p>

Function	Governing Board	ESP	School
	<p>maintaining a pool of grassroots individuals affiliated with the school to assist in planning and maintenance of any development/fundraising needs. The governing board will make decisions approving these activities and their mission driven purpose throughout the life of the school.</p>	<p>the ESP to be present on the ground with the local board, community groups, and school staff.</p>	<p>the spokesperson for immediate CR needs overtime.</p>
<b>Information Technology</b>	<p>The board will make ultimate decisions on the cost and needs for IT in the school based on reporting from the ESP and school leader.</p>	<p>The ESP will provide IT support as needed for the school and will manage contracts with providers for the school in collaboration with the board and school leader.</p>	<p>The school leader will plan for, find vendors, and manage day-to-day IT needs with appropriate staff.</p>
<b>Facilities Management</b>	<p>The local board will have ultimate authority on the time frame of buying back the school. The local board will also govern decisions of needs based assessments regarding management of the school site as needed.</p>	<p>The ESP will manage communication of facility needs in collaboration with the school leader as needed for the life of the partnership. The ESP will also coach the local school with financial management in the budget to buy back the building in a timely manner for local ownership of the facility.</p>	<p>The school leader will monitor, assess, and plan for decisions pertaining to the facility needs for the life of the school. The school leader will utilize appropriate reporting structures to have decisions made in a timely manner with the governing board's authority over time.</p>
<b>Vendor Management/Procurement</b>	<p>The local board will monitor reports from ESP and school leader regarding vendor/procurement needs.</p>	<p>The ESP will manage contracts with appropriate school staff for life of partnership.</p>	<p>The school leader will have authority over day-to-day needs regarding vendors and procurement. The school leader will notify the ESP of any support needs and will be responsible for reporting to the governing board and finance committee regarding contract and procurement.</p>

Function	Governing Board	ESP	School
Other Operational Functions, if any			

## Attachment 5: Five Year Business Plan

Athlos Academy of Indiana is proposing only one school. This Attachment is not applicable.

## Attachment 6: Curriculum Scope and Sequence

As discussed in *Section II: School Design*, AAI will utilize curriculum that aligns with the Indiana Academic Standards and Common Core State Standards. The Education Plan includes a full description of the curriculum that will be implemented at AAI. The following demonstrates the alignment of curriculum AAI has chosen to the Indiana Academic Standards.

The AAI leadership team will evaluate the school’s curriculum each year to determine if curriculum changes need to happen. The leadership team will work with staff to evaluate the curriculum being used by the school to see if it is effective for the population of students AAI serves. As AAI’s leaders tweak or significantly alter the school’s curriculum, the AAI team, under the oversight of the board, will ensure these changes do not compromise the program’s alignment with Indiana Academic Standards. AAI will closely monitor the implementation of the curriculum through frequent observations, grade level team meetings and the use of a learning management system (LMS), and support teachers and instructional leaders through a robust professional development program, uniquely tailored to the various needs of each teacher.

### Mathematics

Based on a thorough review of the Indiana Academic Standards and available curricula, Athlos Academy of Indiana will expect students to master the fundamentals of mathematics in the following order. AAI teachers will create a collaborative math environment that fosters rich discourse-justifying thinking, asking questions, and posing problems-nurtures students to take risks, think deeply, and look for connections and relationships. Through instruction that is balanced with structured, guided investigation and independent grappling, a student develops a strong conceptual understanding of mathematics which, over time, builds mathematical literacy. One of the shifts in mathematical standards allows for depth instead of breadth. AAI teachers will be encouraged to go deep into math concepts and allow students time to build a solid foundation in understanding.

### Bridges in Mathematics Curriculum

Bridges in Mathematics is a program that was designed by the Math Learning Center, a non-profit organization. Bridges is a comprehensive program blending structured investigations and independent problem solving. It focuses on deep understanding of math concepts and proficiency with key skills. The strong use of research based visual models supports conceptual connections and accessibility for all learners. Each grade includes a unit that is aligned to the Indiana Academic Standards. The following chart demonstrates AAI’s math alignment for K-8 with the Bridges in Mathematics.

Unit	K	1	2	3	4	5
1	Numbers to Five & Ten -NS -CA	Numbers All Around Us -NS -CA	Figure the Facts -CA -M -DA	Addition & Subtraction Patterns -NS	Multiplicative Thinking -CA -M	Expressions, Equations & Volume -NS

				-CA	-DA	-CA -M -DA
<b>2</b>	Numbers to Ten -NS -M -DA	Developing Strategies with Dice & Dominos -NS -CA	Place Value & Measurement with Jack's Beanstalks -NS -CA	Introduction to Multiplication -CA -M -DA	Multi-Digit Multiplication & Early Division -NS	Adding & Subtracting Fractions -NS
<b>3</b>	Bikes & Bugs: Double, Add & Subtract -NS -CA	Adding, Subtracting, Counting & Comparing -NS -CA	Addition & Subtraction Within 100 -NS -M -DA	Multi-Digit Addition & Subtraction -NS	Fractions & Decimals -NS	Place Value & Decimals -NS -M -DA
<b>4</b>	Path to Adding, Subtracting & Measuring -NS -CA -M -DA	Leapfrogs on the Number Line -NS -CA -M -DA	Measurement -CA -M -DA	Measurement & Fractions -NS -M -DA	Addition, Subtraction, & Measurement -NS -M -DA	Multiplying & Dividing Whole Numbers & Decimals -NS
<b>5</b>	Two-Dimensional Geometry -G	Geometry -G	Place Value to One Thousand -NS -M -DA -CA	Multiplication, Division & Area -CA -M -DA	Geometry & Measurement -G -M -DA	Multiplying & Dividing Fractions -NS
<b>6</b>	Three-Dimensional Shapes & Numbers Beyond Ten -G	Figure the Facts with Penguins -CA -M -DA	Geometry -G	Geometry -G -M -DA	Multiplication & Division Data & Fractions -NS	Graphing, Geometry, & Volume -G -M -DA

	-NS -CA					-NS
<b>7</b>	Weight & Place Value -NS -M -DA -CA	One Hundred & Beyond -NS	Measurement, Fractions & Multi-Digit Computation with Hungry Ants -NS -M -DA	Extending Multiplication & Fractions -NS -CA	Reviewing & Extending Fractions, Decimals & Multi-Digit Multiplication -NS	Division & Decimals -NS
<b>8</b>	Computing & Measuring with Frogs & Bugs -NS -M -DA -CA	Changes, Changes -CA -M -DA	Measurement, Data & Multi-Digit Computation with Marble Rolls -NS -M -DA	Bridge Design & Data Collection & Analysis -G -M -DA	Playground Design -G -M -DA	Solar Design -G -M -DA -NS

Indiana Math Standards Connections Key: NS=Number Sense, CA=Computation & Algebraic Thinking, G=Geometry, M=Measurement, DA=Data Analysis

### 2<sup>nd</sup> Grade AAI Math Curriculum Overview

Bridges in Mathematics for second-grade will cover the following units and topics that students will learn to build on previous knowledge from first grade.

Students focus intensively on the four critical areas specified for mathematics in grade two:

- Extending understanding of base-ten notation
- Building fluency with addition and subtraction
- Using standard units of linear measurement
- Describing and analyzing shapes

The first unit revisits and extends addition and subtraction within 20, helping to ensure that second graders operate with understanding and fact fluency from the start of the school year.



Units 2, 3, 5, and parts of Unit 7, are devoted to place value and multi-digit addition and subtraction. During these units, students learn to count by fives, tens, and multiples of hundreds, tens and ones; read, write, and compare numbers to one-thousand; and develop fluency with addition and subtraction to one-hundred as they solve and pose a wide variety of word problems. Later in the year, the children use concrete models and sketches, as well as strategies based on place value, properties of operations, and the relationship between addition and subtraction, to add and subtract to one-thousand.

Unit 6 revolves around geometry, building foundations for understanding area, volume, congruence, similarity, and symmetry as students investigate, describe, build, draw, combine, decompose, and analyze two- and three-dimensional shapes.

Unit 4, and the first part of unit 7, focus on linear measurement, as students construct their own rules; estimate and measure in inches, feet, yards, centimeters, and meters; and solve problems that involve adding, subtracting, and comparing lengths.

[Bridges Grade 2 Correlations to Indiana Academic Standards for Mathematics](#)

<b>Standard 1: Number Sense</b>				
<b>Standards</b>	<b>Bridges</b>	<b>Number Corner</b>	<b>Bridges Supplement</b>	<b>Assessments</b>
<b>2.NS.1</b> Count by ones, twos, fives, tens, and hundreds up to at least 1,000 from any given number.	Unit 1, Sessions 7, 10-12, 17 Unit 1, pages 42, 47-48, 96-98 (WP's 2B, 2F & 3F) Unit 5, Sessions 2-5, 12, 15, 16, 24, 26 Unit 6, Session 4-9 Unit 6, Pages 720 (HC 26) Unit 7, Session 14	September-December, April-May Daily Number Chart September-October, January, March-May Hundreds Grid September-October, December, March-May Bean Clock, September-October, March Coin Collector	Set A5 Number & Operations: Multi-Digit Addition & Subtraction, Activities 2 & 3 Set A7 Numbers & Operations: Numbers to 1,000 on a Line or Grid, Activities 1 & 2 and Independent Worksheets 1 & 2 Set A9 Number & Operations: More Multi-Digit Addition & Subtraction, Activities 3, 4 & 5 Bridges Practice Book, pp. 15, 43, 81, 97, 117, 143	<b>Informal</b> Bridges Practice Book, pages 15, 43, 81, 97, 117, 143
<b>2.NS.2</b> Read and write whole numbers up to 1,000. Use words, models, standard	Unit 3, Sessions 3, 4, 6, 16 Unit 4, Session 12 Unit 5, Sessions 20, 27 Unit 6, Session 10	January Magnetic Tile February Calendar Grid	Bridges Practice Book, pages 25, 106, 112, 113	<b>Formal</b> Unit 6, Session 13 (Unit 6 Post Assessment)

form and expanded form to represent and show equivalent forms of whole numbers up to 1,000.	Unit 7, Sessions 4, 6–8, 13, 17, 28 Technology Connections Book, pages 26–27 (Technology Connection 10)			Unit 7, Sessions 1 & 29 (Unit 7 Pre and Post-Assessments)
<b>2.NS.3</b> Plot and compare whole numbers up to 1,000 on a number line	Unit 5, Sessions 2, 3, 15, 16, 18, 20, 21 Unit 5, pg. 497 (HC 17) Unit 5, pg. 578 (HC 20) Unit 6, pg. 720 (HC 26)	September-May Hundreds Grid  September-May Daily Number Chart	Set A4 Number & Operations: Place Value, Activities 1-5 Set A7 Numbers & Operations: Numbers to 1,000 on a Line or Grid, Activities 1 & 2 and Independent Worksheets 1 & 2 Set A9 Number & Operations: More Multi-Digit Addition & Subtraction, Activity 5 Bridges Practice Book, pp 7, 43, 48, 72, 105, 128, 141	<b>Informal</b> Bridges Practice Book, pp 105, 128, 141
<b>2.NS.4</b> Match the ordinal numbers first, second, third, etc., with an ordered set up to 30 items.	September-May Calendar Grid		Set A8 Number & Operations: Ordinal Numbers to 100, Activities 1 & 2 and Independent Worksheets 1, 2, & 3	<b>Informal</b> Set A8 Number & Operations: Ordinal Numbers to 100, Independent Worksheet 1
<b>2.NS.5</b> Determine whether a group of objects (up to 20) has an odd or even number of members (e.g., by placing that	Unit 3, Sessions 12, 13, 20  Unit 3, pages 292-294 (WP 5E)	September Daily Number Chart October Daily Number Chart October Magnetic Tile May Magnetic Tile	Set A4 Number & Operations: Place Value, Independent Worksheet 2 Bridges Practice Book, page 133	

<p>number of objects in two groups of the same size and recognizing that for even numbers no object will be left over and for odd numbers one object will be left over, or by pairing objects or counting them by 2s).</p>				
<p><b>2.NS.6</b> Understand that the three digits of a three-digit number represent amounts of hundreds, tens, and ones (e.g., 706 equals 7 hundreds, 0 tens, and 6 ones). Understand that 100 can be thought of as a group of ten tens — called a “hundred.” Understand that the numbers 100, 200, 300, 400, 500, 600, 700, 800, 900 refer to one, two, three, four, five, six, seven, eight, or</p>		<p>September Hundreds Grid  October Hundreds Grid</p>	<p>Set A7 Number &amp; Operations: Numbers to 1,000 on a Line or Grid, Activities 1 &amp; 2 and Independent Worksheets 1 &amp; 2</p>	

nine hundreds (and 0 tens and 0 ones).				
<b>2.NS.7</b> Use place value understanding to compare two three-digit numbers based on meanings of the hundreds, tens, and ones digits, using $>$ , $=$ , and $<$ symbols to record the results of comparisons.	Unit 5, Sessions 2, 3, 15, 16, 18, 20, 21 Unit 5, pg. 497 (HC 17) Unit 5, pg. 578 (HC 20) Unit 6, pg. 720 (HC 26)	September-May Hundreds Grid September-May Daily Number Chart	Set A4: Numbers & Operations: Place, Value, Activities 1-5 Set A7: Number & Operations: Numbers to 1,000 on a Line or Grid, Activities 1 & 2 and Independent Worksheets 1 & 2 Set A9: Number & Operations: Multi-Digit Addition & Subtraction, Activity 5 Bridges Practice Book, pp 7, 43, 48, 72, 105, 128, 141	<b>Informal</b> Bridges Practice Book, pp 105, 128, 141

**Standard 2: Computation and Algebraic Thinking**

<b>Standards</b>	<b>Bridges</b>	<b>Number Corner</b>	<b>Bridges Supplement</b>	<b>Assessments</b>
<b>2.CA.1</b> Add and subtract fluently within 100.		January-April Base 10 Bank	Bridges Practice Book, pp 7, 9, 13, 19, 21, 29, 49, 50, 59, 69, 71, 81, 98, 100, 112, 130, 142, 144	
<b>2.CA.2</b> Solve real-world problems involving addition and subtraction within 100 in situations of adding to, taking from, putting together, taking apart, and comparing, with unknowns in all parts of the addition	Unit 5, Sessions 22, 23, 28  Unit 7, Session 9	October Magnetic Tile November Hundreds Grid December Hundreds Grid January Base 10 Bank February Base 10 Bank March Base 10 Bank April Base 10 Bank May Coin Collection	Set A9 Number & Operations: More Multi-Digit Addition & Subtraction, Activities 3, 4, 5, 6, 7 and Independent Worksheet 6 Bridges Practice Book, pp 11, 17, 23, 27, 31, 33, 35, 37, 41, 45, 57, 63, 64, 73, 77, 79, 85, 106, 109, 120 Set A9 Number & Operations: More Multi-	<b>Informal:</b> Bridges Practice Book, pp 109, 110  <b>Formal:</b> Unit 5, Sessions 1 & 32 (Unit Pre- and Post-Assessments)

<p>or subtraction problem (e.g., by using drawings and equations with a symbol for the unknown number to represent the problem). Use estimation to decide whether answers are reasonable in addition problems.</p>			<p>Digit Addition &amp; Subtraction, Activities 1, 2, 6, 7 Bridges Practice Book, pp 109 – 111</p>	
<p><b>2.CA.3</b> Solve real-world problems involving addition and subtraction within 100 in situations involving lengths that are given in the same units (e.g., by using drawings, such as drawings of rulers, and equations with a symbol for the unknown number to represent the problem).</p>	<p>Unit 5, Sessions 3, 6-10, 21-25  Unit 5, pp 627-628, 631-633 (WP’s 9D, 9F Unit 7, Sessions 9 Unit 7, pp 807-808 WP 10F)</p>	<p>January-February Base Ten Bank</p>	<p>Set A5 Number &amp; Operations: Multi-Digit Addition &amp; Subtraction, Activity 4 Set A9 Number &amp; Operations: More Multi-Digit Addition &amp; Subtraction, Activities 1, 2 and Independent Worksheets 1–3, 7 Bridges Practice Book, pp 94, 98, 100, 102, 103, 108, 112, 114, 118, 121, 122, 130, 131, 133, 137, 142</p>	<p><b>Formal:</b> Unit 5, Sessions 1 &amp; 32 (Unit Pre- and Post-Assessments). Unit 7, Sessions 2 &amp; 29 (Unit Pre and Post-Assessments)</p>
<p><b>2.CA.4</b> Add and subtract within 1000, using models or drawings and strategies based on place value,</p>	<p><b>See Supplemental Resources</b></p>			

<p>properties of operations, and/or the relationship between addition and subtraction; describe the strategy and explain the reasoning used. Understand that in adding or subtracting three-digit numbers, one adds or subtracts hundreds and hundreds, tens and tens, ones and ones, and that sometimes it is necessary to compose or decompose tens or hundreds.</p>				
<p><b>2.CA.5</b> Use addition to find the total number of objects arranged in rectangular arrays with up to 5 rows and up to 5 columns; write an equation to express the total as a sum of equal groups.</p>	<p><b>See Supplemental Resources</b></p>			
<p><b>2.CA.6</b> Show that the order in which</p>	<p>Unit 3, Sessions 1, 4, 7</p>	<p>October Magnetic Tile November Hundreds Grid</p>	<p>Set A2 Number &amp; Operations: Solving</p>	

two numbers are added (commutative property) and how the numbers are grouped in addition (associative property) will not change the sum. These properties can be used to show that numbers can be added in any order.	Unit 3, pages 231–234, 284–285 (WP’s 4A, 4B, 5A)	December Hundreds Grid	Equations, Independent Worksheet 2 Set A9 Number & Operations: More Multi-Digit Addition & Subtraction, Activities 3, 4 & 5 and Independent Worksheet 9 Bridges Practice Book, pages 11, 17, 23, 27, 31, 33, 35, 37, 41, 45, 57, 63, 73, 79, 85	
<b>2.CA.7</b> Create, extend, and give an appropriate rule for number patterns using addition and subtraction within 1000.	Unit 1, Sessions 6, 9, 11, 12, 16, 22 Unit 4, Sessions 24, 25 Unit 1, pages 40–41, 47–48, 89–97 (Work Places 2A, 2F, 3A, 3C, 3F) Unit 3, Session 12 Technology Connections Book, pages 10–11 (TC 2)	November Magnetic Tile  May Magnetic Tile Number Corner  Student Book, pages 1, 5, 11, 39, 55, 59, 81	Bridges Practice Book, pages 7, 9, 13, 21, 29, 43, 49, 50, 143	<b>Informal</b> Unit 1, Sessions 11, 12, 21 (Work Samples) Unit 4, Sessions 24–25 (Work Samples) Bridges Practice Book, pages 49, 50, 143  <b>Formal</b> Unit 1, Sessions 1 & 23 (Unit 1 Pre and Post-Assessment) Number Corner Student Book, pages 55 & 85 (Check-Ups 3 & 4)

Standard 3: Geometry				
Standards	Bridges	Number Corner	Bridges Supplement	Assessments

<p><b>2.G.1</b> Identify, describe, and classify two- and three-dimensional shapes (triangle, square, rectangle, cube, right rectangular prism) according to the number and shape of faces and the number of sides and/or vertices. Draw two-dimensional shapes.</p>	<p>Unit 4, Sessions 2–4, 18–20 Unit 4, pages 363–364, 372–373, 421–422 (WP’s 6A, 6F, 7A) Unit 4, pages 343, 437, 458 (HC’s 12, 15, 16)</p>	<p>December Calendar Grid  May Calendar Grid</p>	<p>Bridges Practice Book, page 61</p>	<p><b>Informal</b> Bridges Practice Book, page 61 <b>Formal</b> Unit 4, Sessions 1, 21 (Unit 4 Pre- and Post-Assessments)</p>
<p><b>2.G.2</b> Create squares, rectangles, triangles, cubes, and right rectangular prisms using appropriate materials.</p>	<p>Unit 4, Sessions 9, 11, 13 Unit 4, pp 364–366, 372–373, 421–422, 427–431 (WP’s 6B, 6F, 7A, 7D, 7E, 7F)</p>			
<p><b>2.G.3</b> Investigate and predict the result of composing and decomposing two- and three-dimensional shapes.</p>	<p>Unit 1, Sessions 19–21 Unit 3, Sessions 9–11 Unit 4, Sessions 4–6, 8, 9, 11–15 Unit 4, pp 364–371, 423–431 (WP’s 6B, 6D, 6E, 7B, 7C, 7E, 7F) Unit 4, p 381 (HC 13)</p>		<p>Bridges Practice Book, pp 2, 14, 66, 76</p>	<p><b>Formal</b> Unit 4, Sessions 1 &amp; 21 (Unit Pre- and Post-Assessments)</p>
<p><b>2.G.4</b> Partition a rectangle into rows and columns of same-size (unit) squares and count to find the total number of same-size squares.</p>	<p><b>See Supplemental Resources</b></p>			
<p><b>2.G.5</b> Partition circles and rectangles into two, three, or</p>	<p>Unit 1, Session 19</p>	<p>December Magnetic Tile</p>		



four equal parts; describe the shares using the words halves, thirds, half of, a third of, etc.; and describe the whole as two halves, three thirds, four fourths. Recognize that equal parts of identical wholes need not have the same shape.	Unit 4, Sessions 9, 11, 14, 16, 17 Unit 7, Session 5–7 Unit 7, pp 793–808 (WP10B, 10C & 10D) Unit 7, p 787 (HC 28)	January Magnetic Tile January Calendar Grid March Calendar Grid		
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<b>Standard 4: Measurement</b>				
<b>2.M.1</b> Describe the relationships among inch, foot, and yard. Describe the relationship between centimeter and meter.			Set D2 Measurement: Length in Customary Units, Activities 1–8 Set D3 Measurement: Length in Metric Units, Activities 1–3 <b>See Supplemental Resources</b>	
<b>2.M.2</b> Estimate and measure the length of an object by selecting and using appropriate tools, such as rulers, yardsticks, meter sticks, and measuring tapes to the nearest inch, foot, yard, centimeter and meter.	Unit 2, pp 161, 182 (HC’s 6, 7)  Unit 7, Sessions 3, 9  Unit 7, pp 752–753 (HC 27)  Unit 7, pp 807–808 (WP 10F)		Set D2 Measurement: Length in Customary Units, Activities 5–8  Set D3 Measurement: Length in Metric Units, Activities 1–3  Bridges Practice Book, pp 20, 24, 30, 44, 125, 127, 129, 144	<b>Informal</b> Bridges Practice Book, pp 20, 24, 30, 44, 124, 126, 128  <b>Formal</b> Number Corner Student Book, pp 37 & 87 (Check-Ups 2 & 4)
<b>2.M.3</b> Understand that the length of an object does not change	<b>See Supplemental Resources</b>			

<p>regardless of the units used. Measure the length of an object twice using length units of different lengths for the two measurements. Describe how the two measurements relate to the size of the unit chosen.</p>				
<p><b>2.M.4</b> Estimate and measure volume (capacity) using cups and pints.</p>	<p>Unit 6, p 699 (HC 25)</p>		<p>Set D1 Measurement: Duration, Activities 5, 6</p>	<p><b>Informal</b> Set D5 Measurement: Telling Time, Independent Worksheet 5 Bridges Practice Book, pages 39, 58, 97, 103, 115, 131, 135, 142 <b>Formal</b> Number Corner Student Book, pp 10, 37 &amp; 87 (Check-Ups 1, 2 &amp; 4)</p>
<p><b>2.M.5</b> Tell and write time to the nearest five minutes from analog clocks, using a.m. and p.m. Solve real-world problems involving addition and subtraction of time intervals on the hour or half hour.</p>	<p>Unit 1, Session 17 Unit 1, pages 90–92 (WP 3B)</p>	<p>September, October, December, March, April, May Bean Clock  April Bean Clock May Bean Clock</p>	<p>Set D5 Measurement: Telling Time, Activities 1 &amp; 2 and Independent Worksheets 1, 2, 3, 4, &amp; 5  Bridges Practice Book, pages 39, 58, 97, 103, 115, 131, 135, 142 Bridges Practice Book, pp 132, 136</p>	<p><b>Informal</b> Set D5 Measurement: Telling Time, Independent Worksheet 5 Bridges Practice Book, pages 39, 58, 97, 103, 115, 131, 135, 142 <b>Formal</b> Number Corner Student Book, pp 10, 37 &amp; 87 (Check-Ups 1, 2 &amp; 4)</p>

**Standard 5: Data Analysis**

**2.DA.1** Draw a picture graph (with single-unit scale) and a bar graph (with single-unit scale) to represent a data set with up to four choices (What is your favorite color? red, blue, yellow, green). Solve simple put-together, take-apart, and compare problems using information presented in the graphs.

**See Supplemental Resources**

**Literacy**

Athlos Academy of Indiana will use a Balanced Literacy framework to support and develop student’s literacy skills in the classroom. Teachers will use a variety of instructional strategies and programs to develop student’s literacy in all content areas. The chart below outlines the curriculum Athlos Academy of Indiana will use and in which grades. In addition is an example of how the EL Education K-2 Reading Foundations Skills Block aligns to the Indiana Academic Standards for 1<sup>st</sup> grade.

	<b>K</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
<b>Reading</b>						
EL Education K-2 Reading Foundations Skills Block	Phonemic awareness/phonics					
Words Their Way	Spelling/Word Analysis					
Lucy Calkins Units of Study in Reading	Reading Workshop (guided reading, shared reading, independent reading, books clubs)					
Learning A-Z	Leveled eBooks and resources for small group differentiation					
<ul style="list-style-type: none"> <li>RAZ Kids</li> </ul>						

• Reading A-Z			
<b>Writing</b>			
Lucy Calkins Units of Study for Writing	Writing Process/Types of Writing		
Write Source SkillsBook		Grammar, mechanics, usage	
	<b>Grade 6</b>	<b>Grade 7</b>	<b>Grade 8</b>
<b>Reading &amp; Writing</b>			
Engage New York ELA Modules	Reading, writing, speaking, listening		
Latin and Greek Roots: A Study of Word Families	Vocabulary development/Word Study		
Write Source SkillsBook	Grammar, mechanics, and usage		

### Lucy Calkins Units of Study in Writing

After deliberate research and consideration, AAI chose Lucy Calkins Units of Study in Writing and Lucy Calkins Units of Study in Reading for developing student’s literacy skills for grades K-5. The Units of Study in Writing series offers grade-by-grade plans to foster students writing skills. A main focus of the curriculum is encouraging students to write about small moments. AAI teachers will have students produce lots of those small moment stories to help them master the writing process. AAI teachers will utilize the small moments as a way to expand on the curriculum and create students who write independently using the writing process correctly. Below is a chart that demonstrates each unit of Lucy Calkins Units of Study in Writing and what teachers will use as the focus. The units will support AAI’s high expectations for the texts that students read and write to accelerate their reading development.

Grade Level	Unit 1	Unit 2	Unit 3	Unit 4
Kindergarten	<i>Launching Writing Workshop</i> K.RF.1, K.RF.2.1, K.RF.2.2, K.RF.2.3, K.RF.2.4, K.RF.3.1, K.RF.3.2, K.RF.3.3, K.RF.3.4, K.RF.3.5, K.RL.2.1, K.RL.2.2,	<i>Writing for Readers</i> Narrative writing true stories K.RF.1, K.RF.2.1, K.RF.2.2, K.RF.2.4, K.RF.3.1, K.RF.3.2, K.RF.3.3, K.RF.3.4, K.RL.2.1, K.RL.2.2, K.RL.2.3, K.RL.3.2,	<i>How-To Books</i> Informational writing on procedures K.RF.1, K.RF.3.1, K.RF.3.2, K.RF.3.3, K.RF.3.4, K.RN.2.3,	<i>Using Words to Make Change</i> Persuasive writing to address problems K.RF.1, K.RF.4.1, K.RF.4, K.RL.2.1, K.RL.2.2, K.RL.2.3,

	K.RN.2.1, K.RN.2.2, K.W.3.2, K.W.3.3, K.W.4, K.W.5	K.RL.4.1, K.RN.2.2, K.RN.2.3, K.RN.3.1, K.RN.4.2, K.W.3.3, K.W.4, K.W.5	K.RN.3.1, K.RN.4.2, K.W.4, K.W.5	K.RN.2.1, K.RN.2.2, K.RN.3.1, K.RN.4.1, K.RN.4.2, K.W.3.1, K.W.3.2, K.W.4, K.W.5
First	<i>Small Moments: Writing with Focus, Detail, and Dialogue</i> Narrative writing of stories 1.RF.1, 1.RF.3.2, 1.RF.3.4, 1.RF.3.5, 1.RF.4.1, 1.RF.4.2, 1.RF.5, 1.RL.2.1, 1.RL.2.3, K.RL.4.1, 1.W.3.2, 1.W.3.3	<i>Nonfiction Chapter Books</i> Informational writing of texts to teach others 1.RF.1, 1.RF.3.2, 1.RF.3.4, 1.RF.3.5, 1.RF.4.1, 1.RN.1, 1.RN.2.1, 1.RN.2.2, 1.RN.2.3, 1.RN.3.1, 1.W.3.2, 1.W.3.3	<i>Writing Reviews</i> Persuasive writing expressing opinions 1.RF.1, 1.RF.3.2, 1.RF.3.5, 1.RF.5, K.RL.2.1, 1.RL.2.2, K.RL.2.3, 1.RL.4.2, K.RN.2.1, K.RN.2.2, 1.RN.4.1, 1.W.3.1, 1.W.3.3	From Scenes to Series: Writing Fiction Using action, dialogue, and feelings in writing 1.RF.1, 1.RF.3.2, 1.RF.3.3, 1.RF.4.1, 1.RL.1, 1.RL.2.1, 1.RL.2.2, K.RL.2.3, K.RL.4.1, 1.W.3.3
Second	<i>Lessons from Masters: Improving Narrative Writing</i> Detailed and engaging narratives 2.RF.4.3, 2.RF.5, 2.RL.1, 2.RL.2.1, 2.RL.2.2, 2.RL.2.3, 2.RL.3.1, 2.RL.4.1, 2.W.3.3, 2.W.4, 2.W.5	<i>Lab Reports and Science Books</i> Design and write about experiments and science information 2.RF.4.3, 2.RF.4.4, 2.RF.4.5, 2.RF.4.6, 2.RN.1, 2.RN.2.1, 2.RN.2.2, 2.RN.2.3, 2.RN.3.1, 2.W.4, 2.W.5,	<i>Writing About Reading</i> Gather evidence from text to craft arguments 2.RL.1, 2.RL.2.1, 2.RL.2.2, 2.RL.2.3, 2.RL.4.1, 2.W.3.1, 2.W.4, 2.W.5	<i>Poetry: Big Thoughts in Small Packages</i> Rich language and figures of speech 2.RL.1, 2.RL.2.1, 2.RL.3.1, 2.RL.3.2, 2.W.3.3, 2.W.4, 2.W.5
Third	<i>Crafting True Stories</i> Personal narrative with emphasis on revision process 3.RF.4.2, 3.RF.5, 3.RL.2.1, 3.RL.2.2, 3.RL.2.3, 3.RL.3.1, 3.RL.3.2, 3.RL.4.1, 3.W.1, 3.W.3.3, 3.W.4, 3.W.5	<i>Boxes and Bullets: Personal and Persuasive Essays</i> Organizations and evidence in informational writing 3.RF.4.2, 3.RF.5, 3.RN.1, 3.RN.2.1, 3.RN.2.2, 3.RN.2.3, 3.RN.3.1, 3.RN.3.3, 3.RN.4.2, 3.W.1, 3.W.3.2, 3.W.4, 3.W.5	<i>Changing the World: Persuasive Speeches, Petitions, &amp; Editorials</i> 3.RF.5, 3.RN.4.2, 3.W.1, 3.W.3.1, 3.W.3.2, 3.W.1, 3.W.3.1, 3.W.3.2, 3.W.4, 3.W.5	<i>Once Upon a Time: Adapting and Writing Fairy Tales</i> Story structure and fictional writing techniques 3.RF.5, 3.RL.1, 3.RL.2.1, 3.RL.2.2, 3.RL.2.3, 3.RL.3.1, 3.RL.3.2, 3.RL.4.1, 3.W.1, 3.W.3.3, 3.W.4, 3.W.5
Fourth	<i>The Arc of Story: Writing Realistic Fiction</i> Character development	<i>Boxes and Bullets: Personal and Persuasive Essays</i>	<i>Bringing History to Life</i> Historical research	<i>The Literary Essay: Writing About Fiction</i> Essay writing

	4.RF.5, 4.RL.1, 4.RL.2.1, 4.RL.2.3, 4.RL.3.1, 4.W.1, 4.W.3.3, 4.W.4, 4.W.5	Organizations and evidence in informational writing 4.RF.6, 4.RF.5, 4.RL.1, 4.RL.2.3, 4.RL.3.1, 4.RN.2.1, 4.RN.2.2, 4.W.1, 4.W.3.3, 4.W.4, 4.W.5	4.RF.5, 4.RL.2.1, 4.RL.2.2, 4.RL.2.3, 4.RL.3.2, 4.RN.2.1, 4.RN.2.2, 4.RN.2.3, 4.RN.3.1, 4.RN.3.2, 4.RV.3.3, 4.RN.4.1, 4.RN.4.2, 4.W.1, 4.W.3.1, 4.W.3.2, 4.W.4, 4.W.5	4.RF.5, 4.RL.1, 4.RL.2.1, 4.RL.2.2, 4.RL.2.3, 4.RL.4.2, 4.W.1, 4.W.3.1, 4.W.4, 4.W.5
Fifth	<i>Narrative Craft</i> Stories with themes 5.RF.5, 5.RL.1, 5.RL.2.1, 5.RL.2.2, 5.RL.2.3, 5.RL.3.1, 5.RL.3.2, 5.RN.3.3, 5.W.1, 5.W.3.3, 5.W.4, 5.W.5	<i>The Lens of History: Research Reports</i> Using many resources 5.RF.5, 5.RL.2.3, 5.RL.3.1, 5.RN.2.2, 5.RN.2.3, 5.RN.3.1, 5.RN.3.2, 5.RN.3.3, 5.RN.4.2, 5.W.1, 5.W.3.2, 5.W.3.3, 5.W.4, 5.W.5	<i>Shaping Texts: From Essay and Narrative to Memoir</i> Analyzing form and content 5.RL.1, 5.RL.2.2, 5.RL.3.1, 5.W.1, 5.W.3.1, 5.W.3.3, 5.W.4	<i>The Research-Based Argument Essay</i> Evidence and analysis 5.RF.5, 5.RL.2.2, 5.RN.4.1, 5.RN.2.2, 5.RN.3.2, 5.RN.3.3, 5.RN.4.2, 5.W.1, 5.W.3.1, 5.W.4, 5.W.5

[Lucy Calkins Units of Study in Reading](#)

AAI chose Lucy Calkins Units in Writing and Reading so the curriculum would work together to build students literacy skills. Teachers will use Lucy Calkins Units in Reading to support the implementation of Lucy Calkins Units in Writing. This curriculum will build each grade level on student’s foundational knowledge of reading and AAI teachers will utilize complex texts. Lucy Calkins Units in Reading provides teachers with curriculum that has been developed using nation-wide best practices. AAI teachers will utilize the units below to help students achieve grade-level reading and meet goals on state-wide assessments.

Grade Level	Unit 1	Unit 2	Unit 3	Unit 4
Kindergarten	<i>We Are Readers</i> Print concepts, phonemic awareness, emergent reading K.RF.1, K.RF.3.1, K.RF.3.2, K.RF.3.3, K.RF.3.4, K.RF.4.1, K.RF.5, K.RL.1, K.RL.2.1, K.RL.2.2, K.RL.2.3, K.RL.4.1, K.RL.4.2, K.RN.1, K.RN.2.1,	<i>Super Powers: Reading with Print Strategies and Sight Word Power</i> Print concepts, phonemic awareness, fluency, and meaning K.RF.1, K.RF.3.1, K.RF.3.2, K.RF.3.3, K.RF.3.4, K.RF.4.1, K.RF.4.3, K.RF.4.4, K.RF.4.5,	<i>Bigger Books, Bigger Reading Muscles</i> Additional strategies to support decoding, fluency, comprehension K.RF.1, K.RF.3.1, K.RF.4.1, K.RF.4.3, K.RF.4.4, K.RF.4.5, K.RF.5, K.RL.1, K.RL.2.1, K.RL.2.2, K.RL.2.3, K.RL.3.1,	<i>Becoming Avid Readers</i> Reading clubs, poetry, practicing strategies K.RF.1, K.RF.4.3, K.RF.5, K.RL.1, K.RL.2.1, K.RL.2.2, K.RL.2.3, K.RL.4.1, K.RL.4.2, K.RN.1, K.RN.2.1, K.RN.2.2, K.RN.2.3, K.RN.3.1, K.RN.4.1, K.RN.4.2, K.W.3.3, K.W.5

	K.RN.2.2, K.RN.2.3, K.RN.3.1, K.RN.4.2, K.W.3.2, K.W.3.3, K.W.5	K.RF.5, K.RL.1, K.RL.1, K.RL.2.1, K.RL.2.2, K.RL.2.3, K.RL.4.1, K.RL.4.2, K.RN.1, K.RN.3.1, K.RN.4.2, K.W.3.2, K.W.3.3	K.RL.3.2, K.RL.4.1, K.RL.4.2, K.RN.1, K.RN.2.1, K.RN.2.3, K.RN.3.1, K.RN.4.2, K.W.3.3	
First	<i>Building Good Reading Habits</i> Strategies, decoding, and shared reading 1.RF.1, 1.RF.3.4, 1.RF.3.5, 1.RF.4.1, 1.RF.5, 1.RL.1, 1.RL.2.1, 1.RL.2.2, 1.RL.2.3, 1.RL.3.1, 1.RL.3.2, 1.RL.4.1, 1.RL.4.2, 1.RN.1, 1.RN.2.1, 1.RN.2.2, 1.RN.2.3, 1.RN.3.1, 1.W.3.1, 1.W.3.2, 1.W.3.3	<i>Learning About the World: Reading Nonfiction</i> Comprehension strategies for nonfiction 1.RF.3.2, 1.RF.4.1, 1.RF.5, 1.RN.1, 1.RN.2.1, 1.RN.2.2, 1.RN.2.3, 1.RN.3.1, 1.RN.4.1, 1.RN.4.2, 1.W.3.2, 1.W.4, 1.W.5	<i>Readers Have Big Jobs to Do: Fluency, Phonics, and Comprehension</i> Comprehension strategies, more complex text 1.RL.1, 1.RL.2.1, 1.RL.2.2, 1.RL.2.3, 1.RL.3.2, 1.RL.4.1, 1.RL.4.2, 1.RN.1, 1.RN.2.1, 1.RN.2.2, 1.RN.2.3, 1.RN.3.1, 1.W.3.3	<i>Meeting Characters and Learning Lessons: A Study of Story Elements</i> Story Elements for inferential and literal meaning 1.RF.5, 1.RL.1, 1.RL.2.1, 1.RL.2.2, 1.RL.2.3, 1.RL.3.2, 1.RL.4.1, 1.RL.4.2, 1.W.3.3
Second	<i>Second Grade Reading Growth Spurt</i> Fluency, comprehension, sharing opinions 2.RF.4.3, 2.RF.4.4, 2.RF.4.6, 2.RF.5, 2.RL.1, 2.RL.2.1, 2.RL.2.2, 2.RL.2.3, 2.RL.3.1, 2.RL.3.2, 2.RL.4.1, 2.W.3.3, 2.W.4	<i>Becoming Experts: Reading Nonfiction</i> Vocabulary, compare and contrast texts 2.RF.4.3, 2.RF.5, 2.RI.10, 2.RN.2.1, 2.RN.2.2, 2.RN.2.3, 2.RN.3.1, 2.RN.3.3, 2.RN.4.1, 2.RN.4.2, 2.W.3.2, 2.W.5	<i>Bigger Books Mean Amping Up Reading Power</i> Fluency, figurative language, reading goals 2.RF.4.3, 2.RF.5, 2.RL.1, 2.RL.2.1, 2.RL.2.2, 2.RL.2.3, 2.RL.3.1, 2.RL.3.2, 2.RL.4.1, 2.W.3.3, 2.W.4, 2.W.5	<i>Series Book Clubs</i> Book clubs and author's craft 2.RF.5, 2.RL.1, 2.RL.2.1, 2.RL.2.2, 2.RL.2.3, 2.RL.3.1, 2.RL.3.2, 2.RL.4.1, 2.W.3.1, 2.W.3.3, 2.W.5
Third	<i>Building a Reading Life</i> Strategies for more complex text and structure 3.RF.3, 3.RF.5, 3.RL.1, 3.RL.2.2, 3.RL.2.3, 3.RL.3.1, 3.RL.3.2, 3.RL.4.1, 3.RN.1,	<i>Reading to Learn</i> Main ideas, supporting text, nonfiction structure 3.RF.3, 3.RF.5, 3.RL.1, 3.RL.2.1, 3.RL.2.2, 3.RL.2.3, 3.RL.3.1, 3.RN.1, 3.RN.2.1,	<i>Character Studies</i> Character development, compare & contrast story elements 3.RF.5, 3.RL.1, 3.RL.2.1, 3.RL.2.2, 3.RL.2.3, 3.RL.3.2,	<i>Research Clubs: Elephants, Penguins, and Frogs, Oh My!</i> Research, compare and contrast 3.RF.4.2, 3.RF.4.6, 3.RF.5, 3.RN.1, 3.RN.2.1, 3.RN.2.2,

	3.RN.2.1, 3.RN.2.2, 3.RN.3.3, 3.W.3.1, 3.W.3.2, 3.W.3.3, 3.W.4	3.RN.2.2, 3.RN.2.3, 3.RN.3.1, 3.RN.4.2, 3.W.1, 3.W.3.2, 3.W.3.3, 3.W.5	3.RL.4.1, 3.RL.4.2, 3.W.1, 3.W.3.3	3.RN.2.3, 3.RN.3.1, 3.RN.3.3, 3.RN.4.2, 3.W.1, 3.W.3.2, 3.W.4, 3.W.5
Fourth	<i>Interpreting Characters: The Heart of the Story</i> Genre and character study 4.RF.4.6, 4.RF.5, 4.RL.1, 4.RL.2.1, 4.RL.2.2, 4.RL.2.3, 4.RL.3.1, 4.RL.3.2, 4.RL.4.1, 4.RL.4.2, 4.W.1, 4.W.3.3, 4.W.4	<i>Reading the Weather, Reading the World</i> Nonfiction text structures 4.RF.4.6, 4.RF.5, 4.RN.1, 4.RN.2.1, 4.RN.2.2, 4.RN.2.3, 4.RN.3.1, 4.RN.3.2, 4.RV.3.3, 4.RN.4.1, 4.RN.4.2, 4.W.1, 4.W.3.2, 4.W.4, 4.W.5	<i>Reading History: The American Revolution</i> Multiple perspectives, vocabulary 4.RL.2.1, 4.RL.2.2, 4.RL.2.3, 4.RN.1, 4.RN.2.1, 4.RN.2.2, 4.RN.2.3, 4.RN.3.1, 4.RN.3.2, 4.RV.3.3, 4.RN.4.1, 2.RN.4.2, 4.W.1, 4.W.3.1, 4.W.3.2, 4.W.4, 4.W.5	<i>Historical Fiction Clubs</i> Text complexity, craft, and structure 4.RL.1, 4.RL.2.1, 4.RL.2.2, 4.RL.2.3, 4.RL.3.1, 4.RL.3.2, 4.RL.4.1, 4.RL.4.2, 4.RN.2.1, 4.RN.2.2, 4.RN.2.3, 4.RN.3.1, 4.W.1, 4.W.3.3, 4.W.4, 4.W.5
Fifth	<i>Interpretation Book Clubs: Analyzing Themes</i> Story elements and themes 5.RF.4.6, 5.RF.5, 5.RL.1, 5.RL.2.1, 5.RL.2.2, 5.RL.2.3, 5.RL.3.1, 5.RN.1, 5.RN.2.1, 5.RN.2.2, 5.W.1, 5.W.3.1, 5.W.3.2, 5.W.3.3, 5.W.4, 5.W.5	<i>Tackling Complexity: Moving Up Levels of Nonfiction</i> Independent inquiry project 5.RF.4.6, 5.RF.5, 5.RN.1, 5.RN.2.1, 5.RN.2.2, 5.RN.2.3, 5.RN.3.1, 5.RN.3.2, 5.RN.3.3, 5.RN.4.1, 5.RN.4.2, 5.W.3.2, 5.W.4, 5.W.5	<i>Argument and Advocacy: Researching Debatable Issues</i> Perspective, craft, & arguments 5.RF.5, 5.RN.1, 5.RN.2.1, 5.RN.2.2, 5.RN.2.3, 5.RN.3.2, 5.W.3.1, 5.W.4, 5.W.5	<i>Fantasy Book Clubs: The Magic of Themes and Symbols</i> Genre study, story elements 5.RL.1, 5.RL.2.1, 5.RL.2.2, 5.RL.2.3, 5.RL.3.1, 5.RN.2.1, 5.RN.2.2, 5.RN.2.3, 5.W.3.3, 5.W.4, 5.W.5

### K-2 Reading Foundations Skills Block

EL Education recently published a K-2 Reading Foundations Skills Block, supported by Open Up Resources. The skills block uses a systemic phonics approach grounded in the Phase Theory of reading development of Dr. Linnea Ehri. The Skills Block is divided into four eight-week long modules. Each module is divided into seven five-day “cycles” of instruction. Each cycle includes an intentional sequence of instructional practices to build students’ phonemic awareness, phonological skills, and fluency.

The skills block is one hour long, with 15-20 minutes of whole group instruction and 45 minutes of differentiated small group and independent work time. The whole group instruction has three parts: Opening, Work Time, and Reflection, and Goal Setting. During the Opening, all students experience instructional practices aligned to grade-level standards. Work Time consists of student using instructional routines to practice introduced graphemes, phonemes, spelling patterns, or skills. During the Reflection and Goal Setting time, students reflect on their new learning



and set goals for growth. During the differentiated and independent work time, teachers work with students to introduce new material, reteach, or extend students’ needs. When students are not working with the teacher, they are engaged in independent reading, word work, writing practice.

The K-2 Skills Block is designed for three years and aligned to reading foundation standards and the four Phases of Reading and Spelling Development (Metsala, J. Ehri, L. (1998); Word Recognition in Beginning Literacy; Mahwah, NJ; Erlbaum). Assessment is instrumental in ensuring students are progressing as readers. There are three types of assessments embedded in the K-2 Skills Block: benchmark assessments, cycle assessments, and daily assessments. These help teachers monitor student progression through the phases and modify instruction to support students’ strengths and challenges. The ultimate goal is to develop independent, fluent readers, confident in their abilities and comprehension. This program will support proficiency for advancement by steering students toward a successful IREAD-3 passage during their third grade year.

Below is a chart that demonstrates the alignment of K-2 Reading Foundation Skills Block to the Indiana Academic Standards using the curriculum’s modules to show alignment.

Source: *Implementing the K-2 Reading Foundational Skills Block*, EL Education

Print Concepts				
<b>Indiana Academic Standards</b>	<b>1.RF.2.1</b> Students are expected to build upon and continue applying concepts learned previously.			
	<b>1.RF.2.2</b> Students are expected to build upon and continue applying concepts learned previously.			
	<b>1.RF.2.3</b> Recognize the components of a sentence (e.g., capitalization, first word, ending, punctuation).			
	<b>1. RF.2.4</b> Identify and name all uppercase (capital) and lowercase letters of the alphabet.			
<b>Long-term learning target:</b> I can identify features of a sentence, including the first word, capital letters, and ending punctuation.				
<b>Supporting Targets</b>	<b>Module 1</b>	<b>Module 2</b>	<b>Module 3</b>	<b>Module 4</b>
I can point to where a sentence begins.	X			
I can point to where a sentence ends.	X			
I can find the capital letters in a sentence.	X			
I can point to the punctuation of a sentence.	X			
Phonological Awareness				

<b>Indiana Academic Standards</b>	<p><b>1.RF.3.1</b> Students are expected to build upon and continue applying concepts learned previously.</p> <p><b>1.RF.3.2</b> Blend sounds, including consonant blends, to produce single- and multi- syllable words.</p> <p><b>1.RF.3.3</b> Add, delete, or substitute sounds to change single-syllable words</p> <p><b>1.RF.3.4</b> Distinguish beginning, middle (medial), and final sounds in single-syllable words.</p> <p><b>1.RF.3.5</b> Segment the individual sounds in one-syllable words.</p>			
<b>Long-term learning target:</b> I can identify long and short vowel sounds in (single syllable) words that I hear.				
<b>Supporting Targets</b>	<b>Module 1</b>	<b>Module 2</b>	<b>Module 3</b>	<b>Module 4</b>
I can identify long and short vowel sounds in single-syllable words that I hear.			X	
I can identify the short vowel sounds for each of the five vowel letters.	X			
I can listen to a single-syllable word and identify the short vowel sounds it contains.	X			
I can identify the long vowel sounds of five vowels.			X	
I can listen to a single-syllable word and identify the long vowel sound it contains.			X	
<b>Long-term learning target:</b> I can blend sounds together (including consonant blends) to make a (spoken) word.				
<b>Supporting Targets</b>	<b>Module 1</b>	<b>Module 2</b>	<b>Module 3</b>	<b>Module 4</b>
I can blend two phonemes (to form a spoken word)	X			
I can blend three phonemes to form a spoken word.	X			
I can blend four phonemes to form a spoken word.		X		
<b>Long-term learning target:</b> Each time my mouth changes position, I can say and hear a different phoneme.				

I can identify phonemes in a one-syllable word.				
<b>Supporting Targets</b>	<b>Module 1</b>	<b>Module 2</b>	<b>Module 3</b>	<b>Module 4</b>
I can identify and say the first phoneme (sound) in a one-syllable word.	X			
I can identify and say the middle vowel phoneme (sound) in a one-syllable word.	X			
I can identify and say the final phoneme (sound) in a one-syllable word.	X			
I can listen to spoken single-syllable words and pronounce the beginning, middle, or ending phonemes (sounds) in CVC words ending with /l/, /r/, or /x/.	X (l)	X(x)		X(r)
<b>Long-term learning target:</b> I can say a word and segment (break apart) into its individual consonant and vowel phonemes (in order).				
<b>Supporting Targets</b>	<b>Module 1</b>	<b>Module 2</b>	<b>Module 3</b>	<b>Module 4</b>
I can say a two-phoneme word and segment (break apart) into individual phonemes (sounds) in order.	X			
I can say a three-phoneme word and segment (break apart) into individual phonemes (sounds) in order.	X			
I can say a four-phoneme word and segment (break apart) into individual phonemes (sounds) in order.		X		
<b>Phonics</b>				
<b>Indiana Academic Standards</b>	<b>1.RF.4.1</b> Use letter-sound knowledge of single consonants (hard and soft sounds), short and long vowels, consonant blends and digraphs, vowel teams (e.g. <i>ai</i> ) and digraphs, and r-controlled vowels to decode phonetically regular words (e.g., <i>cat, go, black, boat, her</i> ), independent of context.			

	<p><b>1.RF.4.2</b> Decode one-syllable words in the major syllable patterns (CVC, CVr, V, VV, VCe), independent of context.</p> <p><b>1.RF.4.3</b> Apply knowledge of final-e and common vowel teams (vowel digraphs) for representing long vowel sounds.</p> <p><b>1.RF.4.4</b> Recognize and read common and regularly spelled high-frequency words by sight (e.g., <i>have, said</i>).</p> <p><b>1.RF.4.5</b> Read words in common word families (e.g., <i>-at, ate</i>).</p> <p><b>1.RF.4.6</b> Read grade-appropriate root words and affixes including plurals, verb tense, comparatives (e.g., <i>look-ed, -ing, -s, -er, -est</i>), and simple compound words (e.g., <i>cupcake</i>) and contractions (e.g., <i>isn't</i>).</p>			
<b>Long-term learning target: I can identify long and short vowel sounds in (single syllable) words that I hear.</b>				
<b>Supporting Targets</b>	<b>Module 1</b>	<b>Module 2</b>	<b>Module 3</b>	<b>Module 4</b>
I can explain that sometimes two letters make one sounds in words.	X			
I can identify the sound that corresponds to each of several consonant digraphs: sh, ch, th, wh, ph, ng, ck	X	X		
<b>Long-term learning target: I can decode regularly spelled one-syllable words by mapping graphemes and phonemes.</b>				
<b>Supporting Targets</b>	<b>Module 1</b>	<b>Module 2</b>	<b>Module 3</b>	<b>Module 4</b>
I can decode regularly spelled one-syllable words by mapping graphemes and phonemes.	X	X		
<b>Long-term learning target: I can identify common spellings for long vowel sounds when I see a word with a vowel in the middle and an e at the end.</b>				
I can identify common spellings for long vowel sounds when I see a word with a vowel team (two vowels that make a long vowel sound) in the middle.				
<b>Supporting Targets</b>	<b>Module 1</b>	<b>Module 2</b>	<b>Module 3</b>	<b>Module 4</b>
I can decode a word with a vowel team (two vowels that make a long vowel sound) in the middle.				X

I can decode a word with a vowel in the middle and a silent e at the end			X	
I can decode words with other vowel patterns like igh and r-controlled vowels.				X
<b>Long-term learning target:</b> I can count the number of syllables in a printed word by identifying the vowel sounds in the word.				
<b>Supporting Targets</b>	<b>Module 1</b>	<b>Module 2</b>	<b>Module 3</b>	<b>Module 4</b>
I can identify vowel sounds in the spelling of a multisyllabic (more than one syllable) word.		X	X	X
I can identify the number of syllables in a word based on the number of vowel sounds.				
<b>Long-term learning target:</b> I can break a word into two syllables, identify the type of syllables used, and use that information to read the word. I can use what I know about the types of syllables to decode (read) a two-syllable word.				
<b>Supporting Targets</b>	<b>Module 1</b>	<b>Module 2</b>	<b>Module 3</b>	<b>Module 4</b>
I can identify the five or six types of syllables in written words.			X	X
I can look at written multisyllabic words and identify the syllable pattern.			X	X
I can decode (read) two-syllable words by thinking about the syllable type.			X	X
<b>Long-term learning target:</b> I can read words with -s, -ed, and -ing, endings. I can use what I know about the types of syllables to decode (read) a two-syllable word.				
<b>Supporting Targets</b>	<b>Module 1</b>	<b>Module 2</b>	<b>Module 3</b>	<b>Module 4</b>
I can read words with an -s ending.	X	X		
I can read words with an -ed ending.		X	X	X
I can read words with an -ing ending.		X	X	X
<b>Long-term learning target:</b> I can read first-grade words that “don’t play fair” (irregularly spelled words)				

<b>Supporting Targets</b>	<b>Module 1</b>	<b>Module 2</b>	<b>Module 3</b>	<b>Module 4</b>
I can read first-grade words that “don’t play fair” in isolation.	X	X	X	X
I can read first-grade words that “don’t play fair” in text.	X	X	X	X
<b>Fluency</b>				
<b>Indiana Academic Standard</b>	<b>1.RF.5:</b> Orally read grade-level appropriate or higher texts smoothly and accurately, with expression that connotes comprehension at the independent level.			
<b>Long-term learning target:</b> I can read and understand grade-level texts.				
<b>Supporting Targets</b>	<b>Module 1</b>	<b>Module 2</b>	<b>Module 3</b>	<b>Module 4</b>
I can read and understand grade-level texts.	X	X	X	X
<p>Long-term learning target:</p> <p>I can read aloud and understand the words.</p> <p>I can read smoothly, not too fast or too slow, and with expression and meaning.</p> <p>I can read accurately (with few or decoding mistakes).</p>				
<b>Supporting Targets</b>	<b>Module 1</b>	<b>Module 2</b>	<b>Module 3</b>	<b>Module 4</b>
I can read aloud and understand the words.	X	X	X	X
I can read smoothly, not too fast or too slow, and with expression and meaning.	X	X	X	X
I can read accurately (with few or no decoding mistakes).	X	X	X	X
<b>Long-term learning target:</b> I can monitor my own reading for understanding.				
<b>Supporting Targets</b>	<b>Module 1</b>	<b>Module 2</b>	<b>Module 3</b>	<b>Module 4</b>

I can self-correct or confirm a word in a text by asking myself, "Does this make sense?"	X	X	X	X
I can reread when something doesn't make sense or sound right.	X	X	X	X

### Science

Athlos Academy of Indiana's science program will utilize the Next Generation Science Standards (NGSS) and Indiana Academic Standards for Science to follow the three-dimensional framework for K-12 science education. Athlos Academy of Indiana will purchase at least one science resource/text for teachers to support unit development. AAI will use the National Geographic Ladders Science series which aligns to the Indiana Academic Standards. For more information: [http://www.nxtbook.com/nxtbooks/ngl/prek-12\\_2016/index.php#/27](http://www.nxtbook.com/nxtbooks/ngl/prek-12_2016/index.php#/27).

	Kindergarten	Grade 1	Grade 2	Grade 3	Grade 4	Grade 5	Grade 6	Grade 7	Grade 8
<b>Life Science</b>	Need of Living Things and Survival	Life Cycles and Adaptations	Adaptations & Variation & Heredity	From a Seed to a Plant	Traits, Survival, Ecosystems	Cycles of Matter & Flow of Energy  Senses & Survival	Food & Energy from the Sun  Ecosystems interactions & trophic levels  Native & non-native species	Health & Disease  (Cell structure & function, cell division, specialization, body systems)	Reproduction, Heredity, Adaptation, & Change over Time  Viruses & Bacteria

<b>Earth/Space Science</b>	Weather Patterns & Predicting Weather	Stories in the Sky The Science of Soil	Our Dynamic Earth	Weather and Climate Around the World Rocks & Fossils	The Earth & the Moon Geologic Processes & Natural Resources	The Composition and Scale of the Solar System Protecting Earth's Resources	The Composition and Scale of the Solar System (Part 2) Gravity & Orbits	Geology (rocks & minerals, rock strata & geologic time, tectonic plates, landforms, layers of the Earth)  Natural Resources (including synthetics)-Renewable vs. Non-Renewable	Analyzing Evidence of Climate Change  Water Cycle's Connection to Gravity & Solar Energy  Human Impacts on Natural Resources
<b>Physical Science</b>	Forces, motion, design solutions	States of Matter Sounds and Light	Structure and Properties of Matter	Forces, Interactions, and Energy	Forces in Transportation Energy Conservation & Transfer	Matter, Mass, and Chemical Reactions	Forces & Motion: Speed & Velocity  Potential & Kinetic Energy  Waves: Types & Transfer	Understanding Matter: Atoms, Elements, States  Newton's Laws  Heat & Heat Transfer	Structure of Atoms/Compounds & Periodic Table  Understanding Density  Chemical vs. Physical Change & Chemical Equations

### Social Studies

The social studies program at Athlos Academy of Indiana will be centered on five social studies domains. The domains listed below are based on the National Curriculum Standards for Social Studies on the principle that students need a strong foundation in these five domains to be engaged and informed citizens of a diverse, global society. Athlos Academy of Indiana will align, as demonstrated below, the content to the Indiana Academic Standards.



	<b>Kindergarten</b>	<b>Grade 1</b>	<b>Grade 2</b>	<b>Grade 3</b>	<b>Grade 4</b>	<b>Grade 5</b>
<p><b>History/</b></p> <p><b>Chronological &amp; Historical Thinking Skills</b></p> <p>(Comprehension Analysis, Interpretation &amp; Research)</p>	<p>Families: Past and Present</p> <p>Holidays, Celebrations, Heroes/Heroines</p>	<p>Communities: Past and Present</p> <p>American Songs, Symbols, &amp; National Holidays</p>	<p>Local Community: Changes, Contributors, Celebrations, Important Events</p>	<p>Native Americans, Early State Settlement</p> <p>Region's Communities</p>	<p>American Indians &amp; Arrival of Europeans to 1770 US History; Indiana Statehood</p>	<p>Before and After Arrival of Europeans to 1610 Colonization and Settlement: 1607 to 1763 American Revolution 1763-1783</p> <p>Federal Republic 1783-1800</p>
<p><b>Civics &amp; Government</b></p>	<p>Citizenship &amp; American Symbols</p>	<p>Rights &amp; Responsibilities; Citizenship</p>	<p>Government &amp; Community Leaders; Citizenship; Pledge of Allegiance</p>	<p>Local, State, National Government, Roles of Citizens &amp; Issues</p>	<p>Indiana's Constitution; Citizen Participation &amp; Public Issue</p>	<p>Roots of Democracy &amp; Founding Documents</p>
<p><b>Geography</b></p>	<p>Maps, Globes, School &amp; Community</p>	<p>Geographic Characteristics of Home, School, Neighborhood</p> <p>Seasonal Weather and Sun</p>	<p>Compare Community: Physical, Cultural, and Human Features</p>	<p>Compare Indiana: Physical, Cultural and Human Features; Environmental Issues and Impact</p>	<p>US States; Physical Regions, Climate, Natural Resources, Settlement Routes</p>	<p>Early US Settlements, US Physical Characteristics</p>

<b>Economic &amp; Financial Literacy</b>	Basic Wants and Needs	Producers & Consumers; Goods & Services	Local Community: Productive Resources & Community Workers	Interaction & Interdependence for Buyers & Sellers  Consumer Choices & Savings	Indiana Goods and Services; Trade & Productivity	Early Economic Systems; Impact of Technology & Inventions  Productivity Increase
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	Grade 6	Grade 7	Grade 8
<b>History/Chronological Historical Thinking Skills</b>  (Comprehension, Analysis, Interpretation, & Research)	Early & Classical Civilization: 1900 B.C./B.C. E to 700 A.D./C.E.  Medieval Period: 400 A.D./C.E.-1500 A.D./C.E.  Early Modern Era: 1500-1800  Modern Era: 1700 to the present	Early Civilizations, States, and Empires 3500 B.C./B.C.E to 650 A.D./C.E.  The Spread of Cultural, Economic, Social and Political Ideas: 500 B.C. (B.C.E.)-1600 A.D. (C.E.)  Major Civilizations, States and Empires: 300-1650  Exploration, Conquest and Post-Colonial States: 1500 to the Present	The American Revolution and Founding of the United States: 1754 to 1801  National Expansion and Reform: 1801 to 1861  The Civil War and Reconstruction Period: 1850 to 1877  Issues-Analysis and Decision-Making
<b>Civics &amp; Government</b>	Major Forms of Government; Impact on Human Rights; Citizenship in History	Asia, Africa, and Southwest Pacific: <ul style="list-style-type: none"> <li>• Colonial Rule &amp; Independence</li> <li>• Government Systems, Human Rights, &amp; Citizenship</li> <li>• International Organizations</li> </ul>	Foundations of Government  Functions of Government (Federal System)  Roles of Citizens & Participation  Constitutional Issues

<b>Geography</b>	Europe and Americas: <ul style="list-style-type: none"> <li>• Countries &amp; Capitals</li> <li>• Places &amp; Regions</li> <li>• Physical, Cultural, Human Systems</li> </ul>	Asia, Africa, and Southwest Pacific: <ul style="list-style-type: none"> <li>• Places &amp; Regions</li> <li>• Physical, Cultural, Human Systems</li> <li>• Environmental Issues</li> </ul>	United States: <ul style="list-style-type: none"> <li>• Land forms, Human features, Physical &amp; Cultural Characteristics</li> <li>• Growth &amp; Development</li> <li>• Human &amp; Environment Interaction</li> </ul>
<b>Economics</b>	Europe & Americas: Trade, Economic Systems & Issues	Asia, Africa, and Southwest Pacific:  Trade, Economic Systems, & Issues	United States: <ul style="list-style-type: none"> <li>• Economic Systems</li> <li>• Labor Development</li> <li>• Entrepreneurs/Inventors</li> <li>• Technology/Inventions</li> <li>• International Trade</li> <li>• Banking System</li> </ul>

**Supplemental Resources:**

Under the direction of its school leader, AAI will utilize the curriculum and instructional expertise of Athlos Academies (ESP) to help inform its decisions as to effective resources through the which to differentiate or tailor its support for targets, based on their strengths, weaknesses, and learning styles. Athlos Academy of Indiana leadership team will determine purchasing or using supplemental resources as needed for the student populations it serves. Some examples of potential supplementary resources AAI could use are Khan Academy for math, Reading A-Z and RAZ Kids for literacy.

## Attachment 7: Academic and Exit Standards

Athlos' three-pillar educational model will prepare Athlos Academy of Indiana students to live healthy lifestyle who are college and career ready. The school will use Indiana Academic Standards and assessments that are aligned with the Athlos educational model as its exit standards for students to graduate. The local board, school leader, and ESP will make sure that any changes regarding assessments at the state level be implemented appropriately in the opening year of 2019.

### Assessment

Athlos Academy of Indiana will use assessment practices that are healthy, informative, and authentic to evaluate student achievement. The assessments will be aligned to Indiana Academic Standards and evaluate students' mastery of the Athlos three-pillars. A balanced approach to assessment uses a triangulation method as multiple sources of data are used to inform and develop a comprehensive understanding of a student's progress and readiness. Athlos Academy of Indiana will use the following assessment tools:

- Measures of Academic Progress (MAP)
- Formative and summative assessments
- Benchmark assessments
- Individual reading levels
- Proficiency on ILEARN
- Student portfolios documenting artifacts
- Student-led conferences and goal setting
- Showcase presentations highlighting Performance Character development
- Healthy Body Assessments
- Standards-based grading of assessments

### Student Learning Outcomes

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

Pass the 5<sup>th</sup> grade ISTEP (ILEARN) in English/ Language Arts, Mathematics, Science, and Social Studies  
Be proficient in Grade 5 Indiana Academic Standards for:

- English/ Language Arts
  - Demonstrate mastery in foundational reading skills: word analysis, fluency, vocabulary, and comprehension of literary, nonfiction, and multimedia text, including meaning, features, and structures
  - Demonstrate mastery in writing including the application of writing genres (persuasive, informative, narrative) and the writing process, the use of the research process, the use of standard English conventions, the use of effective speaking, listening, and presentation skills
  - Demonstrate mastery in media literacy
- Math
  - Demonstrate mastery in math strands: Number Sense, Computation, Algebraic Thinking, Geometry, Measurement, and Data Analysis
  - Demonstrate mastery in mathematical process standards such as making sense of problems, modeling with mathematics, attending to precision, and critiquing mathematical reasoning
- Science

- Demonstrate mastery in content areas including Physical Science, Earth and Space Science, Life Science, and Engineering practices
- Demonstrate mastery in science and engineering processes such as defining problems, using models, conducting investigations, constructing explanations and solutions, and communicating information.
- Social Studies
  - Demonstrate mastery in content areas including history of US up to 1800, civics and US government, US geography, and economic relationships and decision making.
  - Demonstrate mastery in skills including problem-solving, conducting research, analyzing maps, charts, graphs; debating issues, and evaluating alternative solutions.
- Computer Science
  - Demonstrate mastery in core concepts including data and information, computing systems, programs and algorithms, networking and communication, the impact and culture of technology
- Healthy Body Assessments
  - Include fitness and athleticism assessments that measure student growth as they have progressed through the Athlos athletic curriculum.
- Performance Character Assessment
  - Showcase presentations
  - Presentations will have a purpose, demonstrate learning of Indiana Academic Standards, and mastery of the Athlos three-pillars
- Proficiency of Characteristics of Successful Learners standards:
  - Preparation and Organization
  - Collaboration, participation, and engagement
  - Care and Community

### *8th Grade Expectations*

Be proficient in Grade 8 Indiana Academic Standards for:

- 8<sup>th</sup> grade ILEARN assessment of content areas
- English/ Language Arts
  - Demonstrate mastery in literacy skills: comprehension of literary themes, elements, central ideas, and structure; appreciate interpretation of literary works
  - Demonstrate mastery in nonfiction reading skills: comprehend nonfiction texts, determine use of structural organization and author’s purpose; evaluate claims and use of different mediums for presentation
  - Demonstrate mastery in vocabulary development in literature and nonfiction texts
  - Demonstrate mastery in writing including the application of writing genres (argumentative, informative, narrative) and the writing process, the use of the research process, the use of standard English conventions, the use of effective speaking, listening, and presentation skills
  - Demonstrate mastery in media literacy
- Math
  - Demonstrate mastery in math strands: Number Sense; Computation; Algebra and Functions; Geometry and Measurement; Data Analysis, Statistics, and Probability
  - Demonstrate mastery in mathematical process standards including making sense of problems, modeling with mathematics, attending to precision, and critiquing mathematical reasoning
- Science

- Demonstrate mastery in content areas including Physical Science, Earth and Space Science, Life Science, and Engineering practices
- Demonstrate mastery in science and engineering processes such as defining problems, using models, conducting investigations, constructing explanations and solutions, and communicating information.
- Demonstrate mastery in literacy in science including comprehending science and technical texts and writing for a variety of science tasks, purposes, and audiences.
- Social Studies
  - Demonstrate mastery in content areas including history of US up to Reconstruction, civics and US government, US geography and its influence on national development, and economic factors related to national development
  - Demonstrate mastery in skills such as chronological thinking, historical comprehension, analysis and interpretation, research, and issue-analysis and decision-making
  - Demonstrate mastery in literacy in history/social studies including comprehending historical and social studies texts and writing for a variety of discipline-specific tasks, purposes, and audiences.
- Computer Science
  - Demonstrate mastery in core concepts including data and information, computing systems, programs and algorithms, networking and communication, the impact and culture of technology
- Healthy Body Assessments
  - Include fitness and athleticism assessments that measure student growth as they have progressed through the Athlos athletic curriculum.
- Performance Character Assessment
  - Showcase presentations
  - Presentations will have a purpose, demonstrate learning of Indiana Academic Standards, and mastery of the Athlos three-pillars
- Proficiency of Characteristics of Successful Learners standards:
  - Preparation and Organization
  - Collaboration, participation, and engagement
  - Care and Community

#### Remediation and Retention Plan

If a student is not making adequate progress towards proficiency during the school year, an intervention plan will be developed. The plan will include thorough documentation of students' assessments, achievements, and formative assessments to track students' progress and see if the intervention plan is working. Parents will be informed of this plan and offered guidance and support for the home. The goal is to have the student demonstrate readiness for the next grade level by the end of the year.

A student's progress and achievement of grade level expectations will be well documented using a variety of assessment practices: standards-based grading report card, student-led conferences, standardized tests, and portfolios. If there are concerns about a child's readiness and promotion to the next grade level, a team of school leaders, teachers, and parents will convene to review all the documentation for an informed decision-making process. After discussion and analysis of the student's performance, a retention decision will be made by the school leader.

#### Special Circumstances

\*ELL: The above criteria apply to ELL students, yet certain exemptions may apply. The school's ELL teacher will be responsible for providing sufficient documentation of interventions in order to justify exemptions.

\*Special Education: The above criteria apply to SPED students, yet certain exemptions may apply. The school's SPED Director will be responsible for providing sufficient documentation of IEP accommodations and/or modifications and interventions in order to justify exemptions.

# Attachment 8: School Calendar and Schedule

Athlos Academy of Indiana Calendar

2019 to 2020

Aug 2019						
S	M	T	W	T	F	S
				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

Sep 2019						
S	M	T	W	T	F	S
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					

Oct 2019						
S	M	T	W	T	F	S
		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		

Nov 2019						
S	M	T	W	T	F	S
					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

Dec 2019						
S	M	T	W	T	F	S
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				

Jan 2020						
S	M	T	W	T	F	S
			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	

Feb 2020						
S	M	T	W	T	F	S
						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

Mar 2020						
S	M	T	W	T	F	S
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				

Apr 2020						
S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

May 2020						
S	M	T	W	T	F	S
					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						

Jun 2020						
S	M	T	W	T	F	S
	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				



*Legend*

**First and last day of school**

August 5: First Day of School

June 5: Last day of school

**Holidays and/or No School**

September 2: Labor Day

October 7-18: Fall Break

November 27-29: Thanksgiving Holiday

December 23-January 3: Winter Break

January 20: Martin Luther King Jr. Holiday

February 17: Presidents' Day

March 9-20: Spring Break

May 25: Memorial Day

**Student-led Conferences**

October 3-4

February 13-14

*Schedule*

Athlos Academy of Indiana will conduct 183 instructional days to comply with IC 20-18-2-17 and IC 20-30-2-3. AAI will follow a similar schedule and calendar to the surrounding school districts. After approval, the board will formally adopt the calendar and adjust days as needed. Below are two sample schedules that show instructional minutes for different content areas and what would a typical day would look like for a student at Athlos Academy of Indiana.

The sample daily schedules will be repeated for all five days of the week with minimal variations: for grades 1-5, students will have physical activity sessions four days a week and music/fine arts class one day per week. Instructional blocks will include English Language Arts (including reading, writing and spelling), mathematics, science and social studies. Teachers will have some freedom to choose how to plan the flexible instructional blocks scheduled four days per week in the K-5 schedule. Opening huddles include number corner and Performance Character curriculum.

The schedules demonstrate a commitment to the Athlos mission and how AAI will implement the three pillars into the school daily. The daily schedule incorporates many critical components of the Athlos Academies (ESP) model, including regular Athlos athletic movement classes, free play sessions, and morning and afternoon huddles. Under this schedule, first-through-fifth grade students will have between four and a half 4.5 and five hours of curriculum and 5.9 to 6.25 hours of instruction per day. There are variations between grades due to scheduling the use of shared spaces, such as the lunch room and gymnasium/turf.

**THIRD GRADE SAMPLE SCHEDULE**

	<b>Monday</b>	<b>Tuesday</b>	<b>Wednesday</b>	<b>Thursday</b>	<b>Friday</b>
<b>8:15-8:45</b>	<i>Huddle</i>	<i>Huddle</i>	<i>Huddle</i>	<i>Huddle</i>	<i>Huddle</i>
<b>8:45-9:50</b>	<i>Math*</i>	<i>Math</i>	<i>Math</i>	<i>Math</i>	<i>Math</i>
<b>9:50-10:05</b>	<i>Free Play</i>	<i>Free Play</i>	<i>Free Play</i>	<i>Free Play</i>	<i>Free Play</i>
<b>10:05-12:30</b>	<i>ELA</i>	<i>ELA</i>	<i>ELA</i>	<i>ELA</i>	<i>ELA</i>
<b>12:30-1:00</b>	<i>Lunch</i>	<i>Lunch</i>	<i>Lunch</i>	<i>Lunch</i>	<i>Lunch</i>
<b>1:00-1:25</b>	<i>Free Play</i>	<i>Free Play</i>	<i>Free Play</i>	<i>Free Play</i>	<i>Free Play</i>
<b>1:25-1:50</b>	<i>Flexible Instructional Block</i>	<i>Flexible Instructional Block</i>	<i>Fine Arts: Visual Arts</i>	<i>Flexible Instructional Block</i>	<i>Science/Social Studies</i>
<b>1:50-2:35</b>	<i>Athletic Movement</i>	<i>Fine Arts: Music</i>	<i>Athletic Movement</i>	<i>Athletic Movement</i>	<i>Athletic Movement</i>
<b>2:35-3:20</b>	<i>Science/Social Studies</i>	<i>Science/Social Studies</i>	<i>Science/Social Studies</i>	<i>Science/Social Studies</i>	<i>Science/Social Studies</i>
<b>3:20-3:30</b>	<i>Huddle</i>	<i>Huddle</i>	<i>Huddle</i>	<i>Huddle</i>	<i>Huddle</i>

**SIXTH GRADE SAMPLE SCHEDULE**

<b>8:15-9:10</b>	<i>Athletic Movement</i>
<b>9:15-10:05</b>	<i>English/Language Arts</i>
<b>10:05-10:15</b>	<i>Free Play</i>
<b>10:15-11:10</b>	<i>Math</i>
<b>11:15-12:10</b>	<i>Social Studies</i>
<b>12:10-12:40</b>	<i>Elective (visual arts, choir, technology)</i>
<b>12:40-1:05</b>	<i>Lunch</i>
<b>1:05-1:30</b>	<i>Free Play</i>
<b>1:35-2:30</b>	<i>Huddle</i>
<b>2:35-3:30</b>	<i>Science</i>

*A Typical Athlos Elementary School Student’s Day*

A typical elementary school day for a student at AAI is described below to demonstrate how the Athlos models aligns with the schedule for proper implementation. Elementary students will have one teacher instructing them in all subject areas, except physical activity and music/fine arts, while middle school students will have different teachers for each instructional subject.

After being greeted while arriving at school, students will spend 30 minutes in the morning huddle. The huddle is a critical part of Athlos culture, because teachers provide instruction on Performance Character curriculum, and throughout the school day they will refer to the huddle and integrate new examples of the character traits.

After the huddle, students will begin mathematics. Math instruction will include lessons that highlight enactive, iconic, and symbolic learning. Athlos teachers take their students' ideas about solving

mathematical problems seriously, and facilitate rich discussions that develop students conceptually. During a well-designed math class, teachers would include purposeful movement breaks that include short bursts of physical activity linked to math instruction. In the learning management system is a guide of movement breaks teachers can use as a starting point for planning movement breaks in their lessons and for transitions.

Because short periods of unstructured free play are vital for a well-focused classroom, the teacher will accompany the students outside for a 15-minute break. By using effective transitions, the teacher will prepare the students to come back to class to begin an English language arts lesson. Using both reading and writing workshops, the teacher engages students, finding ways to differentiate instruction among students. Literature that connects to broader themes helps students develop skills and interests that spark curiosity to tackle challenges.

Next, students eat a healthy lunch in the lunchroom. After lunch, students have another unstructured free play lasting 25 minutes. This supervised session of physical activity reinvigorates the body and strengthens cognitive retention of learned concepts. After this, there is a flexible instructional block. Alternatively, this time can be used for quiet reading time or may be used to further review important topics.

Next, students head to athletic movement class, which takes place on the turf or in the gym. The 45-minute class begins with movement preparation. After warming up, students are taught a structured lesson that builds on a series of lessons over the course of the week and year to help students become more efficient movers. The athletic movement class is designed by grade level groups so students receive instruction tailored to their age.

After their time in athletic movement class, students begin science class. The science curriculum is full of inquiry, often taught through the lens of the Healthy Body pillar. The teacher can connect the thermogenic component of the movement preparation, experienced during athletic movement class earlier in the day. Connecting science concepts to experienced movement activity can increase relevancy, excitement, and engagement with the academic content for students. During science class, the teacher integrates short movement breaks that reinforce lever and force concepts and activate neurons to stimulate learning.

On other days, instead of science, students will begin social studies after athletic movement class. Social studies instruction is full of deep inquiry and cross-disciplinary connection of historical events to present-day situations and conflicts.

Throughout the day, in all classes and experiences, students receive feedback through formative assessments. Teachers will use summative assessments as a way to check for understanding on how students are mastering the content. To conclude the day, students come together for a final huddle. Athlos schools focus on educating the whole child.

#### *A Typical Athlos Elementary Teacher's Day*

Elementary school teachers will arrive at school before students to prepare for the day and use the morning to check on lesson preparation for the day. The teacher may write learning targets on the whiteboard and reorganize the classroom to be most conducive for the lesson plans for that day. The teacher may preparation for formative assessments. After students arrive, the teacher will lead the morning huddle, which sets the tone for the day. The teacher will lead students in instructional lessons

in blocks, as listed in the calendar. Instructional periods will include movement breaks designed by the teacher or included in curricula provided by the Athlos Academies (ESP).

During the school day when the teacher's students are out of the classroom for athletics instruction, lunch, or music/fine arts instruction, the teacher will have time for classroom preparations including grading and communications, as well as grade-level collaborative planning. On some days, this time will be set aside for professional learning community sessions, professional development, or staff-level meetings. After the school day ends, additional preparations or meetings may occur as needed and scheduled.

## Attachment 9: Enrollment Policy

Athlos Academy of Indiana (AAI) will follow federal and Indiana regulations, guidelines, and practices regarding enrollment of all students. AAI created its enrollment policy in compliance with IC 20-24-5-4 and IC 20-24-5-5. AAI enrollment will be open to all students who are eligible under the laws of Indiana for admission to public school. In compliance with federal laws, no student will be denied to AAI based on race, ethnicity, national origin, gender, disability aptitude, or athletic ability. Athlos Academies (ESP) will be assisting AAI in the enrollment process as part of its partnership.

The enrollment window will open on January 1 and last until February 15. If needed, a lottery will take place at the next board meeting. It will take approximately two weeks to align student preference issues with the lottery. The first round of offers will be sent out in March with a two-week response window for parents to respond electronically. The school will also schedule in-person meetings each month to give families without access to proper technology an opportunity to complete paperwork in hardcopy.

Differentiation to accommodate equal access will be a priority. To support families, all materials for marketing, application and enrollment forms, parent newsletters, and other communications will be published in languages needed based on population. At least one front office staff member will be bilingual to support families who need language assistance. The anticipated population will likely require bilingual materials and front office staff to accommodate all families. Bilingual ELL staff will be hired and can work with parents as community liaisons. Athlos Academy of Indiana will provide these accommodations to ensure equality in the enrollment process.

AAI will have no pre-admission activities for parents or students. Parent(s) and/or guardian(s) will be asked on registration paperwork for Athlos Academy of Indiana to indicate whether their child has an Individualized Education Plan (IEP) or 504. This information will allow the student support director to initiate a review to ensure that appropriate services are in place and convene a IEP meeting to review and revise the student's IEP. As part of the enrollment process students with an IEP or English Language Learners (ELL) may do testing to assist the student support director in preparation of the student's first day of school. The office manager will be trained and instructed to notify the student support director of all incoming files with IEPs.

Athlos Academy of Indiana board after approval, will adopt a policy similar to the one below that outlines the enrollment process.

### ATHLOS ACADEMY OF INDIANA ENROLLMENT POLICY

#### *I. PURPOSE*

Athlos Academy of Indiana follows federal and Indiana State Department of Education regulations, guidelines, and practices regarding enrollment of all students.

#### *II. POLICY*

A. Advertising for enrollment and for ongoing student recruitment will include print distributions and live meetings, and will include outreach to underserved communities.

B. The school shall not discriminate in its admissions or enrollment policies based on race, color, religion, sex, national or ethnic origin, special needs as defined in IDEA.

1. No family shall be offered incentive or reimbursement to enroll.

C. If there are more applicants than available seats, a lottery will be held.

1. The lottery date shall be annually set by the governing board.

D. Enrollment preference will be given as follows:

1. First to siblings of enrolled pupils and foster children of that pupil's parent/guardian(s);

2. Second to children of the school's full-time staff.

E. Conditions for Enrollment:

1. Students must be 5 years old by September 1 of the year in which they start kindergarten and 6 years old by September 1 of the year in which they start first grade.

2. Parent/guardian(s) of students enrolled in the school must indicate their intent to retain their seat for the following year annually in writing, by the designated date.

a. Unclaimed seats may be considered open and offered to students by lot at that time.

F. When a vacancy occurs because of a student withdrawal, the school may fill the seat immediately.

1. Any vacancy due to student withdrawal will be offered to the first student on the waitlist.

2. If a student does not accept a position, s/he will not forfeit his/her position on the waitlist, but the current position shall be offered to the next student on the list.

G. Following a lottery, a waitlist for an upcoming school year shall be constructed and maintained until the next lottery date as follows:

1. Athlos Academy of Indiana shall maintain three preference lists, one for those with sibling preference, one for those with staff preference, and one for those with no preference.

i. These waitlists shall be exhausted in priority order, with all students on the sibling preference list offered a seat prior to any student on the staff preference list, and so on.

2. On the date of a lottery, all students shall be assigned a random number; those not granted seats in the lottery will be placed in order according to their randomly assigned number on an appropriate preference list.

3. Students whose siblings later accept enrollment at Athlos Academy of Indiana may be moved to the bottom of the sibling preference list.

4. Students whose parents later accept an offer of fulltime employment at Athlos Academy of Indiana may be moved to the bottom of the staff preference list.

5. Students who submit a complete application for enrollment to a grade level that is at capacity after the lottery date will be added to the bottom of the applicable preference list in the order in which the complete application was received.

H. Students on a current year waitlist will be entered into a lottery for the upcoming school year, if they have not accepted a seat prior to the next lottery.

I. Athlos Academy of Indiana may consider lack of response to an offer of enrollment a decline of the offer.

1. Necessary timelines for response will be outlined in offer letters and will be the same for all offers extended at the same time.

2. Timelines for response will be no less than five business days and no more than ten business days.

J. Students may apply to transfer to Athlos Academy of Indiana.

## Attachment 10: Student Discipline Policy

The Athlos Academy of Indiana board will adopt the Student Code of Conduct several months before school starts and provide information to parent/guardian(s) and students regarding behavioral expectations, potential consequences, and procedures for administering discipline through parent meetings and back to school nights. Parent/guardian(s) will be notified of any violation that may result in a student being suspended or expelled from Athlos Academy of Indiana. The code will be available for review in the school leader's office, the school website or, upon request, a hard copy can be provided to students, parent/guardian(s), staff and others. Any board approved revisions will be updated on the school website and made available promptly to interested parties.

The school will develop, implement, and review disciplinary procedures and a Student Code of Conduct. The Student Code of Conduct is integrated with the Positive Behavior Support Plan, which Athlos Academies (ESP) will train the school leadership team on, and is supported through a tiered implementation blueprint. As part of the partnership with the ESP, a nearly finalized version of the Student Code of Conduct. The Student Code of Conduct is inextricably linked to restorative practices and Performance Character by design. The school leader will then finalize the Student Code of Conduct in conjunction with the board, ensuring any local needs are met and then the code will be implemented.

### Standards for Student Conduct

Each student is expected to uphold the Performance Character traits adopted by Athlos Academy of Indiana, and be courteous, be responsible, be prepared, be respectful of others, and cooperate with and assist the school staff to maintain safety, order, and discipline.

Students will be expected to uphold the standards of the code and answer to Athlos Academy of Indiana's disciplinary authority during the regular school day, including while the student is going to and from school, on or off school transportation, as well as during any school-related activity.

The code will also apply for any of the following situations:

- For any school-related misconduct;
- When retaliation against a school employee or volunteer occurs, or is threatened; and
- When criminal mischief is committed on or off school property or at a school-related event

### *Behavior Management Techniques*

Disciplinary measures such as confinement and seclusion are strictly prohibited for all students, including students with disabilities, in accordance with Indiana law. Disciplinary measures such as restraint and time-outs are permitted, in certain situations.

- Restraint is allowed during an emergency and must be discontinued when the emergency no longer exists. It shall be implemented to protect the health and safety of the student and others.
- Time-outs are allowed as a means for a student to regain self-control for a short period of time. The room or setting where the student is separated will not be locked and the exit must not be physically blocked.

Policies on confinement, seclusion, restraint and time-out do not apply to:

- A police officer, while performing law enforcement duties;



- An educational services provider with whom a student is placed by a judicial authority, excluding services provided in an educational program at Athlos Academy of Indiana

### *Training*

Training for school employees, volunteers, or independent contractors regarding the use of restraint shall be provided according to Indiana law. Training for school employees, volunteers, or independent contractors regarding the use of time-out shall be provided according to Indiana law.

### *Documentation*

If restraint is used, school employees, volunteers, or independent contractors shall implement the documentation as required by state law. Necessary documentation or data collection regarding the use of time-out, if any, must be addressed in the IEP or BIP.

## Athlos Academy Anti-Bullying Pledge

A. Bullying at Athlos Academy of Indiana will not be tolerated. The school will create a safe, caring, and respectful school environment. We agree that it is everyone’s responsibility to STOP bullying.

B. Students at Athlos Academy of Indiana will do the following things to prevent bullying:

- Treat each other respectfully.
- Refuse to bully others.
- Refuse to let others be bullied.
- Try to include everyone in play, especially those who are often left out.
- Report bullying to an adult.

## I. Purpose

Athlos Academy of Indiana is committed to making our school a safe and caring place for all students. We will treat each other with respect, and we will refuse to tolerate bullying of any kind at our school.

## II. Policy

A. Bullying occurs in the following situations:

- When someone intentionally commits, or conspires to commit an act of harassment, intimidation, or bullying against another student.
- When an individual repeatedly hurts, frightens, threatens, or intentionally excludes another individual.
- Any intentional gesture or written, verbal, or physical act by a student that causes harm or fear of harm to another student or that student’s property, or that is severe or persistent enough to create an intimidating, threatening, or abusive educational environment for a student.
- When an act of hazing occurs.
- Cyberbullying (the use of technology to commit an act of harassment, intimidation, or bullying).

B. Bullying behaviors include, but are not limited to the following:

- Hurting someone physically by hitting, kicking, tripping, or pushing;
- Stealing or damaging another person’s things;
- Ganging up on someone;
- Teasing someone in a hurtful way;

- Using put-downs, such as insulting someone’s race, religion, or gender;
- Limiting a student’s access to educational tools;
- Spreading rumors or untruths about someone;
- Intentionally excluding someone else, or trying to get other kids not to play with someone;
- Engaging in behaviors meant to physically or mentally harm an individual prior to their acceptance in a social group (hazing); or
- Using any form of technology to engage in cyber-bullying activities.

C. School employees at Athlos Academy of Indiana shall commit to the following to prevent bullying and help children feel safe at school:

- Closely supervise students in all areas of the school and playground; and
- Watch for signs of bullying and stop the behavior when it happens.

D. Any student who feels that he/she is being bullied or harassed should immediately contact his/her teacher or the school leader.

- Retaliation against a victim, good faith reporter, or a witness of bullying is prohibited and subject to disciplinary action including in-school suspension, out of school suspension, or expulsion.
- The school leader or designee shall maintain contact with reporters for a reasonable period of time following their report in order to determine if retaliation has occurred.
- Students who engage in bullying behaviors will be subject to disciplinary action, not limited to revocation of technology privileges, in-school suspension, out of school suspension, or expulsion in severe cases.
- Students found to have submitted a false report of bullying, cyberbullying, hazing, harassment, or retaliation shall be subject to disciplinary action.
- Parent/guardian(s) shall be notified in the event their child is a victim of bullying.

E. The school leader shall ensure appropriate staff oversight of common areas in order to reduce the incidence of bullying.

F. Athlos Academy of Indiana shall collect information annually as a part of its stakeholder survey aimed at determining the prevalence of bullying, cyber-bullying, hazing and harassment in schools, specifically such locations as playgrounds, hallways, and lunch areas.

G. Athlos Academy of Indiana shall provide annual training in order to reduce bullying, cyberbullying, hazing, and harassment to staff, students, and applicable volunteers.

1. Training shall include the following types of aggression:

- Overt aggression (physical fighting such as punching, shoving, kicking, and verbal threatening behavior such as name calling, or both physical and verbal aggression or threatening behavior);
- Relational aggression or indirect, covert, or social aggression (rumor spreading, intimidation, enlisting a friend to assault a child, and social isolation); and
- Sexual aggression or acts of sexual nature or with sexual overtones

2. Additionally, this training shall cover the following topics:

- Cyber-bullying (using email, webpages, text messaging, instant messaging, three-way calling or messaging or any other electronic means for aggression inside or outside of school);
- Civil right violations with accompanying reporting and investigative procedures based upon the students' actual or perceived identities and conformance or failure to conform with stereotype; and
- Awareness and intervention skills such as social skills training for students and staff.

3. Training for students shall be age-appropriate, as determined by the school leader.

H. Prior to implementing a school-sponsored athletic program, Athlos Academy of Indiana provide annual training to students, employees, and coaches that meets the following requirements:

- Student athletes and extracurricular club members shall be informed of prohibited bullying, cyber-bullying, harassment, hazing, and retaliation behaviors as well as potential consequences for engaging in such behaviors.

I. This policy shall be reviewed in conjunction with the discipline plan by administration, staff, students, parents, community council and other community members.

- Review of this policy and the discipline plan shall occur no less than once every three years.

### Athlos Academy of Indiana Electronics Policy

A. Bullying at Athlos Academy of Indiana will not be tolerated. The school will create a safe, caring, and respectful school environment. We agree that it is everyone's responsibility to STOP bullying.

B. Students at Athlos Academy of Indiana will do the following things to prevent bullying:

- Treat each other respectfully.
- Refuse to bully others.
- Refuse to let others be bullied.
- Try to include everyone in play, especially those who are often left out.
- Report bullying to an adult.

#### *I. Purpose*

Electronic devices in the classroom can serve both to enhance and disrupt a student's learning opportunities. Athlos Academy of Indiana acknowledges that the landscape of educational technology is ever-changing and has put the following policy in place to properly govern the permitted uses of electronic devices at Athlos Academy of Indiana.

#### *II. Definitions*

A. **Electronic Device:** A device that is used for audio, video, or text communication or any other type of computer or computer-like instrument. Any device, whether or not it is owned by Athlos Academy of Indiana, that is connected to the school's network is covered by this policy.

B. **Personal Electronic Device:** An electronic device not owned by Athlos Academy of Indiana.

C. **The Children's Internet Protection Act (CIPA):** Regulations enacted by the Federal Communications Commission (FCC) and administrated by the Schools and Libraries Division of the FCC. CIPA requires recipients of federal technology funds to comply with certain Internet filtering and policy requirements.

### *III. Policy*

A. Students may possess electronic devices at school subject to the following conditions:

- Students may carry and possess electronic devices to and from school.
- Personal electronic devices must be turned off and kept in backpacks during school hours except if otherwise allowed by a school teacher or administrator for educational purposes.
- Students shall be personally and solely responsible for the security of personal electronic devices brought to school.
- Athlos Academy of Indiana shall not assume responsibility for theft, loss, damage, or unauthorized calls made with a student's personal electronic device.
- Students may use their personal electric device if the use is established by the appropriate administrator to be necessary for other special circumstances, health-related reasons, or emergency.

B. Students may **not** use electronic devices pursuant to the following:

- For gaming, personal social media, watching videos, listening to music, or during lunch, between classes or before or after school on school premises without adult supervision;
- For taking photographs in restrooms, locker rooms or dressing rooms;
- Posting photographs of another person to social media or online without his/her permission;
- For accessing inappropriate content or for disallowed behaviors
- In ways that bully, humiliate, harass, or intimidate students or school employees consistent with the school's Anti-Bullying Policy
- During standardized assessments unless specifically permitted by statute, the student's IEP, or assessment directions.

C. If a student violates this policy, his/her electronic device may be confiscated by any Athlos Academy of Indiana teacher or school administrator.

- After the first confiscation, the device will be returned to the student at the end of the school day.
- On subsequent confiscations, the device will be released only to the student's parent/guardian(s), after the student has complied with the disciplinary consequences.
- The school may examine a student's personal device and search its contents if there is a reason to believe that school policies or state laws have been violated.
- In extreme cases, law enforcement may be alerted if the student has misused an electronic device in violation of the law.
- Additionally, students may be subject to disciplinary action

D. Students are personally responsible for devices assigned or provided to them by the LEA, both for loss or damage and for use of the devices consistent with this policy

E. This policy shall be published in the Family Handbook.

## Athlos Academy of Indiana Freedom of speech and Religion Policy

### *I. Purpose*

Athlos Academy of Indiana recognizes that a student's right to freedom of speech and religion is guaranteed protected under the First Amendment and as a result, ensures that religion is neither promoted nor inhibited.

### *II. Policy*

A. Athlos Academy of Indiana shall neither promote nor disparage any religious belief or non-belief. Instead, it encourages all students and employees to have appreciation for and tolerance of each other's views.

B. Athlos Academy of Indiana recognizes that one of its educational objectives is to increase its students' knowledge and appreciation of music, art, drama, and literature which may have a religious basis or origin as well as a secular importance, but fundamentally is intrinsic to the overall learning experience of its students.

C. Two obligations of Athlos Academy of Indiana regarding a student's right to freedom of speech and religion are:

- Athlos Academy of Indiana may not endorse religious practices or doctrine, nor may religious activity be coerced; and
- Athlos Academy of Indiana may not forbid students acting on their own from expressing their personal religious views solely because they are of a religious nature.

D. Regarding a student's right to partake in or decline to partake in the Pledge of Allegiance:

- Students are to recite the pledge once a day;
- Notices shall be posted in conspicuous places noting a student's right not to participate; and
- If a student does not wish to participate, he/she may opt out via a written request from his/her parent/guardian.

E. Times when free exercise of religious practices may be prohibited:

- The conduct/speech unreasonably interferes with the ability of school officials to maintain order and discipline;
- Violates school rules;
- Impinges on the rights of others;
- Unreasonably endangers persons/property;
- Creates a coercive atmosphere;
- When student dominates classroom instruction time with religious talk; and/or
- Violates concepts of civility/propriety appropriate to a school setting.

F. Times when free exercise of religious practices may not be prohibited, unless it violates the standards above, includes, but is not limited to the following:

- Reading the Bible or other religious texts or scripture;
- Saying grace before meals;
- Praying with friends in cafeterias, hallways, around flagpoles, or at an athletic event and other extracurricular activities;
- Discussing religious views with other students, attempting to persuade peers about religious topics as long as persuasive speech does not constitute harassment; and/or

- In homework/classroom discussions, presentations, or assignments as long as the topic remains objective and informative and does not put other beliefs down.

G. Religion in curriculum:

- Teaching and researching religion/beliefs of conscious is a legitimate part of academic education;
- Significance of holidays, whether religious or secular, may be explained/discussed in an objective manner as part of classroom instruction or as questions arise from students so as to promote a better understanding among all students;
- May display religious symbols as part of holiday/cultural heritage (as a teaching resource);
- Religious music is allowed as long as it is seasonally appropriate;
- Sacred music may be performed as long as there is a focus on overall quality and educational/historical value; and
- Parent/guardian(s) may request a waiver of participation in any portion of the curriculum or school activity which the requesting party believes to be an infringement upon a right of conscience or the exercise of religious freedom in accordance with state law.

H. Expressions of personal belief from school employees:

- An employee may not attempt to use his/her position to influence a student regarding the student's religious beliefs or lack thereof.
- An employee may respond in an appropriate and restrained manner to a spontaneous question from a student regarding the employee's personal belief or perspective.
- Nevertheless, because of the special position of trust held by school employees, employees may not advocate or encourage acceptance of a belief or perspective; but may explain or define personal religious beliefs or perspectives, etc.

# Attachment 11: Evidence of Support from Community Partners

See the following pages for current letters of support.



**STATE OF INDIANA  
HOUSE OF REPRESENTATIVES**

Robert Behning  
200 W. Washington St.  
Indianapolis, IN 46204  
Website: [www.in.gov/h91](http://www.in.gov/h91)  
E-Mail: [h91@iga.in.gov](mailto:h91@iga.in.gov)

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COMMITTEES:  
Education, Chairman  
Public Health  
Utilities and Energy

September 6, 2017

To Whom It May Concern,

I am writing to express my support for Athlos Academy of Indiana and their charter school application. Their governing board is a group of promising individuals who have proven their dedication to the development of education reform policy, school choice, and the betterment of Indiana's student opportunities. Their partnership with Athlos Academies shows their intention to bring an innovative model with strong infrastructure and experience from a national network to our state.

The model of Athlos Academy of Indiana provides families with a holistic experience of learning – beyond just a push for academic results. The focus on health and wellness with the Healthy Body program provides students in lower grades an opportunity to become physically literate through daily exercise where most students their age do not have access to an adequate physical education program. Athlos' intentional framework of pairing their Healthy Body program with their Performance Character and Prepared Mind pillars will truly prepare students to grow as individuals and become impactful citizens in the future. Lastly, the approach to strong staff development at the heart of innovative teaching practices for an active classroom will provide students with an engaging and high-performing academic experience.

As an advocate for school choice, I believe Indiana is a national leader in terms of charter school laws that attract high-quality applicants to the state. It has not come without great effort. The decision for Athlos Academy of Indiana to locate in Southeastern Marion County will help families who have not had access to charter school options. The partnership for a new facility tailored to the mission of the school coupled with a governing board who will continue to pursue local partnerships to support families will create a strong culture in the community in which the school is located. It is exciting to see an organization pursue this opportunity in a new area of the state.

I look forward to continuing to support Athlos Academy of Indiana and their board members as they complete the steps toward approval. Further, I look forward to celebrating the opening of this school with the families they will be serving in the Southeastern Marion County community.

Sincerely,

A handwritten signature in black ink, appearing to read "Robert Behning", written over a large, stylized flourish.

Robert Behning  
State Representative  
District 91





August 29, 2017

To whom it may concern:

As the Executive Director of The Network for Quality Education (NQE), I am writing to support the application put forth by Athlos Academy of Indiana. Having met with members of their partnered management organization, and knowing the capacity of their governing board members, I believe this school will be a strong contributor to the community as an additional choice option. They are choosing to locate in Southeastern Marion County which is an area that currently has few choice options for families. It is exciting to see an organization continue to grow the impact of charter schools outside of the traditional hotspots such as Indianapolis Public Schools.

The innovative model being presented by Athlos Academy of Indiana is something that a variety of students and families can benefit from. The three pillar model of Healthy Body, Performance Character, and Prepared Mind holistically support a child in becoming a lifelong learner. Further, it prepares students for life beyond school. This is a model that I can see serving diverse populations well.

Athlos has been an incredibly thoughtful organization in the time and care they took to get to know Indiana, and to thoroughly examine potential locations. Their team has gained a great deal of knowledge about our state and several Hoosier cities as they sought to be sure their model would be a good fit wherever they choose to locate. Their team has impressed me with their desire to be a strong participant in the Indiana charter school community. I look forward to watching their model develop from concept in a charter application to a real school on opening day, and to supporting their needs through that process and beyond.

It is exciting to see new models and organizations join the charter space in Indiana. Thank you for considering Athlos Academy of Indiana to join the Hoosier state. I look forward to officially welcoming them to the network when they are ready to open!

Sincerely,

Marcie Brown Carter



*building peace for healthy communities*

To whom it may concern;

My name is Natalie Spriggs-Trobridge and I am the Youth Programs Director at the Peace Learning Center. I am writing this letter of support to show the Peace Learning Center's (PLC) support for the Athlos Academy (AA). I have met with Athlos Academy and look forward to the possible future partnership.

If you have any questions, please feel free to contact me via email at [NSpriggs@PeaceLearningCenter.org](mailto:NSpriggs@PeaceLearningCenter.org) or via phone at 317.327.7144.

Thank you for your time and consideration.

Sincerely,

*Natalie Spriggs-Trobridge*

Natalie Spriggs; Youth Program Director

# LETTER OF RECOMMENDATION

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Dr. Vicky Sherman, M.D. | vsherman@obgynindiana.com

08/29/2017

To Whom It May Concern:

Athlos Academies is an academic environment that is continuing to grow at a steady rate, providing tuition-free public charter school education to over 14,000 students nationwide. Between 2004 and 2014, the number of students in the United States that have chosen to attend a charter school has increased from 2 percent to 5 percent; in number of students this translates to 1.8 million students. It is anticipated the number of charter schools in the United States will continue to grow in the near future.

I am writing this letter on behalf of a colleague, Dr. Julie Schmalz, who is involved in developing an Athlos Academy to serve the city of Indianapolis. Julie's passion for health and wellness embodies the mission of Athlos' pedagogy; to create an environment of learning that balances the mind, body, and the character development of its' students.

This three-pillar approach has been statistically supported in developing well-rounded, competent, and happy students. Many public-school settings have an emphasis on meeting averages of scores placed on educational institutions set by their respective states, and compromise the development of the mental health and well-being of their students to achieve this. While meeting academic standards is a necessity for any academic institution, nurturing additional aspects of development need not be mutually exclusive with the former objective of other public schools.

As a medical provider, I regularly see the desire for holistic and alternative approaches to medical care; this same desire is continuing to grow among parents in regard to their children's education. I have begun a fellowship in Integrative Medicine which focuses on healing and preventing ailments through finding a balance between lifestyle choices, mental health, and

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8360 South Emerson Ave., Suite 100, Indianapolis, IN, 46237

Cell: 317-914-7990

physical health to be able to satiate these desires for my patients. In creating an Athlos Academy in Indianapolis would assuredly satisfy the needs of many parents who are faced with the difficult decision of where to send their children to school. Creating an environment that focuses on academics, in addition to each student as an individual, allows this three-pillar approach to provide the necessary means in assisting children through their development in academia and developing well-rounded individuals with values that foster a utilitarian mindset.

Granting a charter to Athlos in Indianapolis is a necessity that I believe will benefit the community at large, generation by generation.

If you have any further questions feel free to contact me either by telephone or by email at [vsherman@obgynindiana.com](mailto:vsherman@obgynindiana.com) anytime.

Sincerely,

Dr. Vicky Sherman, M.D.

August 30, 2017

To Whom It May Concern:

I am writing a letter in support of a charter school to be established by Athlos Academies, somewhere in the south side of the greater Indianapolis area. Though I have no affiliation with them, just researching their "Pillars of Performance," with an emphasis on engaging the individual student, the importance of health, nutrition, and physical activity, and the building of character and leadership, all seem to be a refreshing and holistic approach to education.

As a physician, I am a believer in the importance and power of good teachers to change individual student's lives. The Athlos Academies model would seem to foster this in its classrooms, and potentially impact a number of young lives. As a former south side resident, and current south side worker, I would love to see Athlos have the opportunity to do just that. Thank you for your time and consideration.

Sincerely,

*R Barry Melbert, MD*

R Barry Melbert, MD

## Attachment 12: Governance Documents

The Board of Directors of Athlos Academy of Indiana has not yet ratified its bylaws, code of ethics, and conflict of interest policies. The policies it adopts will likely be similar to these draft policies.



### DRAFT Bylaws of Athlos Academy of Indiana

An Indiana Nonprofit Corporation

Board Policy [Insert Policy #]

Approved: [Insert Date]

Revised: \_\_\_\_\_

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#### I. ORGANIZATION

- A. Anchor Location: The physical location from which an electronic meeting originates or the participants are connected.
- B. Principal Office: The principal office of Athlos Academy of Indiana, an Indiana Nonprofit Corporation ("Corporation"), is [insert future address]. The Corporation may have other offices as the Board of Directors may designate or as the business of the Corporation may require.
- C. Powers: The Corporation shall have such powers as are now or may hereafter be granted by the Indiana Nonprofit Corporation Law, or any successor legislation; except that such powers may be exercised only in furtherance of the purposes of the Corporation as stated in its Articles of Incorporation and consistent with its status as a corporation described in Section 501(c)(3) of the Internal Revenue Code.
- D. Registered Office: The registered office of the Corporation required by the law, to be maintained in the State of Indiana, is [insert future address here], and may be changed from time to time by the Board of Directors, or as otherwise provided by the law.
- E. Seal: The organization shall not have a seal, but may design a logo.

- F. Name Change: The organization may, by a two-thirds (2/3) vote of the Board of Directors, change its name.
- G. Purpose: The purposes of the Corporation are set forth in the Articles of Incorporation.

## II. BOARD OF DIRECTORS

- A. General Powers and Standard of Care: The Board of Directors has authority to exercise all corporate powers and manage the business and affairs of the Corporation, except as otherwise provided in Indiana Statute or the Articles.

A Director shall perform his or her duties as a Director, including as a member of any committee of the Board upon which the Director may serve, in good faith, in a manner the Director reasonably believes to be in the best interests of the Corporation, and with such care as an ordinarily prudent person in a like position would use under similar circumstances. In performing his or her duties, a Director is entitled to rely on information, opinions, reports or statements, including financial statements and other financial data, in each case prepared or presented by:

1. Officers or employees of the Corporation the Director reasonably believes to be reliable and competent in the matters presented;
2. Legal counsel, public accountants or other persons as to matters that the Director reasonably believes to be within such person's professional or expert competence; or
3. A committee of the Board upon which the Director does not serve as to matters within the committee's designated authority, which committee the Director reasonably believes to merit confidence;

but a Director shall not be considered to be acting in good faith if the Director has knowledge concerning the matter in question that would cause his or her reliance to be unwarranted. A person who performs these duties of a Director shall have no liability to the Corporation by reason of being or having been a Director of the Corporation.

- B. Presumption of Assent: A Director of the Corporation who is present at a meeting of the Board of Directors at which any action on any corporate matter is taken is presumed to have assented to the action unless the Director's dissent is entered in the minutes of the meeting or unless the Director files his or her written dissent to the action with the Secretary of the meeting before adjournment of the meeting or forwards the dissent by certified or registered mail to the

Secretary of the Corporation within three (3) days after the adjournment of the meeting. The right to dissent shall not apply to a Director who voted in favor of the action.

C. Number, Election, and Qualification of Directors: The Board of Directors shall consist of no fewer than seven (7) members, with the exact number fixed pursuant to resolutions adopted by the Board of Directors. Each Director shall serve a term of three years. The names and addresses of the members of the first Board of Directors have been stated in the Articles. The initial Directors shall hold office until the third annual meeting of the Board of Directors and until their successors are elected and qualified. At the third annual meeting of the Board of Directors, the existing Directors shall elect Directors to hold office for a three-year term ending on the third annual meeting of the Board of Directors after

each new Director is elected, and the Board of Directors shall be elected in a like manner every third year thereafter. Each Director will hold office for the term for which he or she is elected and until his or her successor is elected and qualified. Directors need not be residents of the State of Indiana.

D. Vacancies: Any vacancy occurring in the Board of Directors may be filled by the affirmative vote of a majority of the remaining Directors, though less than a quorum of the Directors. A Director elected to fill a vacancy is elected for the unexpired term of the Director's predecessor in office. Any directorship to be filled by reason of an increase in the number of Directors may be filled by the Board of Directors for a term of office continuing only until the next regular election of Directors.

E. Removal of Directors: At a meeting of the Board of Directors called expressly for that purpose, any director may be removed with cause by a vote of a majority of the Directors then in office. Any Director may be removed at such a meeting without cause by a vote of two-thirds of the Directors then in office. F. Committees of the Board of Directors:

1. Membership: The Board of Directors, by resolution adopted by the Directors then in office, may designate and appoint one or more Director committees, each of which shall consist of two or more Directors.

2. Authority: Director committees, to the extent provided in the resolution establishing the committee, will have and exercise the authority of the Board of Directors in the management



- of the Corporation; provided, however, that no Director committee may have the authority of the Board of Directors in reference to (i) authorize distributions, (ii) approve dissolution, merger or the sale, pledge or transfer of all or substantially all of the Corporation's assets, (iii) elect, appoint or remove directors or fill vacancies on the Board of Directors or on any of its committees, or (iv) adopt, amend or repeal the Articles or these Bylaws. The designation and appointment of any committee and the delegation of authority to a committee does not operate to relieve the Board of Directors, or any individual Director, of any responsibility imposed on the Board of Directors, or any individual Director.
3. Tenure: Each member of a committee will continue as such until the next annual meeting of the Board of Directors of the Corporation and until a successor is appointed unless (i) the committee is sooner terminated, (ii) the member is removed from the committee, or (iii) the member ceases to qualify as a member of the committee.
  4. Chairperson: The Board of Directors will appoint one member of each committee as chairperson.
  5. Vacancies: Vacancies in the membership of any committee may be filled by appointments made in the same manner as provided in the case of the original appointments.
  6. Resignation: Any committee member may resign at any time by giving written notice to the Board of Directors, the President, or the Secretary of the Corporation. Unless otherwise specified in the notice of resignation, the resignation takes effect upon receipt. Acceptance of the resignation is not necessary to make the resignation effective.
  7. Removal: The Board of Directors may remove a member with or without cause.
- G. Compensation: No Director or committee member may receive a salary or compensation for services in that capacity. Directors or committee members may be reimbursed for actual expenses incurred in the performance of services as a Director or committee member. This provision does not preclude any Director from serving the Corporation in any other capacity and receiving compensation for services rendered in that capacity.
- H. Director Conflicts of Interest: The Board of Directors shall adopt a Conflicts of Interest Policy. In addition to that policy, any Director who has an interest in a contract or other transaction presented to the Board or a committee for authorization, approval, or ratification must promptly and fully disclose his or her interest to the Board or committee prior to its acting on the contract or transaction. The disclosure shall include any relevant and material facts known to the Director

about the contract or transaction that might reasonably be construed to be adverse to the Corporation's interest.

No Director may cast a vote on any matter that has a direct bearing on services to be provided by that Director, or any organization that he or she represents or that he or she has an ownership interest in or is otherwise interested in or affiliated with, which will directly or indirectly financially benefit the Director.

- I. Loans to Directors: The Corporation shall not lend money to or use its credit to assist its Directors or Officers.
  
- J. Liability of Directors for Wrongful Distribution of Assets: In addition to any other liabilities imposed by law upon the Directors of the Corporation, the Directors who vote for or assent to any distribution of assets, other than in payment of its debts, when the Corporation is insolvent or when the distribution will render the Corporation insolvent, or during the liquidation of the Corporation without the payment and discharge of or making adequate provisions for all known debts, obligations and liabilities of the Corporation, shall be jointly and severally liable to the Corporation for the value of the assets that are distributed, to the extent that debts, obligations and liabilities of the Corporation are not paid and discharged.

A Director is not liable under this section if, in the exercise of ordinary care, the Director relied and acted in good faith upon written financial statements of the Corporation represented to Director to be correct by an officer of the Corporation having charge of its books of account, or certified by an independent licensed or certified public accountant or firm of accountants to reflect fairly the financial condition of the Corporation, nor shall the Director be liable if, in the exercise of ordinary care and good faith, in determining the amount available for a distribution, the Director considered the assets to be equal to their book value.

A Director is not liable under this section, if, in the exercise of ordinary care, the Director acted in good faith and in reliance upon the written opinion of an attorney for the Corporation.

A Director against whom a claim is asserted under this section and who is held liable is entitled to contribution from the persons who accepted or received the distribution knowing the distribution was made in violation of this section, in proportion to the amounts received by them respectively.

### III. BOARD MEETINGS

- A. Directors' and Committee Meetings: Meetings of the Board of Directors, regular, emergency or closed, or meetings of any committee, may be held in or out of the State of Indiana in accordance with [insert statute]. Unless otherwise specified in this section or in the notice for the meeting, all meetings will be held at the anchor location.
- B. Notice of Regular Meetings: Public bodies must be given written notice of the dates, times, and locations of all regularly scheduled meetings at the beginning of each calendar year [insert statute]. Except as otherwise provided in this section, regular meetings of the Board of Directors or any committee may be called by or at the request of the President, any Director or the chair of a committee, as the case may be, upon notice given to all other Directors or committee members, as the case may be, at least three business days before the meeting. Public notice must be posted not less than 24 hours before the meeting, noting the agenda, location, date, and time on the [insert location for posting as per Board's decision], at the anchor location, and after providing notice to a newspaper or local media correspondent [insert statute]. The Board of Directors may provide, by resolution, the time and place for the holding of additional regular meetings without other notice than the resolution. Board meetings will comply with Indiana Open Door Law.

The attendance at or participation of a Director or committee member in any meeting constitutes a waiver of notice of the meeting, except where a Director or committee member attends or participates for the express purpose of objecting to the transaction of any business on the ground that the meeting is not lawfully called or convened.

Neither the business to be transacted at, nor the purpose of, any regular meeting of the Board of Directors or any committee need be specified in the notice for the meeting.

- C. Notice of Emergency Meetings: Emergency meetings of the Board of Directors or any committee may be called by or at the request of the President, any Director or the chair of a committee, as the case may be, upon notice given to all other Directors, committee members, as the case may be, and the public not less than 24 hours before the meeting, noting the agenda, date, time, and location.
- D. Quorum and Voting Requirements: A simple majority of the number of Directors constitutes a quorum for the transaction of business at Board of Directors meetings. The act of the majority of the Directors present at a meeting at which a quorum exists is the act of the Board of Directors. A

majority of the number of committee members fixed and appointed by the Board of Directors or the President, as the case may be, constitutes a quorum for the transaction of business at a meeting of the committee. The act of the majority of the committee members present at a meeting at which a quorum exists is the act of the committee.

- E. Action Without Meeting: Any action required by the State of Indiana to be taken at a meeting of the Board of Directors, or any action that may be taken at a meeting of the Directors or of a committee, may be taken without a meeting if a consent in writing, setting forth the actions so taken, is signed by all of the Directors, or all of the members of the committee, as the case may be. The consent has the same effect as a unanimous vote. Action may only be taken on items listed in the published agenda.
- F. Telephone and Electronic Meetings: Directors may participate in a meeting through use of conference telephone, electronic video communication, or other electronic transmission so long as all of the following apply:
1. Public notice of the electronic meeting has been given stating the location of the anchor location.
  2. Public participation shall be maintained by one Director present at the anchor location.
  3. Each director participating in the meeting can communicate with all of the other directors concurrently, and
  4. Each director is provided with the means of participating in all matters before the Board, including the capacity to propose, or to interpose an objection to, a specific action to be taken by the corporation.
- G. Advisory Council: The Board of Directors, from time to time and in its discretion, may invite or appoint interested persons to a volunteer advisory council of the Board of Directors. Volunteer members of the advisory council will serve at the pleasure of the Board and will not vote, or have a vote, on any Board action. Advisory council members will be chosen or invited based on their interest in the Corporation's purposes and their expertise or ability to advise the Board of Directors on matters related to the Corporation's purpose.

#### **IV. OFFICERS**

- A. Number: The officers of the Corporation will consist of a President, Vice President, Secretary, and Treasurer. The Board of Directors will elect the officers. The Board of Directors may elect or appoint other officers or assistant officers in the Board's discretion. Any two (2) or more offices may be held by the same person except the offices of President and Secretary.
- B. Election and Term of Office: The Board of Directors will elect the officers of the Corporation annually at the annual meeting of the Board of Directors. If the election of officers is not held at the annual meeting, the Board of Directors shall hold the election shall as soon as practicable after the annual meeting. Each officer will hold office until a successor is duly elected and qualified, until the officer's death, or until the officer resigns or is removed.
- C. Removal: The Board of Directors may remove any officer or agent whenever, in its judgment, the best interests of the Corporation will be served by removal. Any such removal shall not prejudice the contract rights, if any, of the officer or agent removed. Election or appointment of an officer or agent does not of itself create contract rights.
- D. Vacancies: The Board of Directors may fill a vacancy in any office because of death, resignation, removal, disqualification or otherwise for the unexpired portion of the term.
- E. President: The President is the principal executive officer of the Corporation and, subject to the control of the Board of Directors, will in general supervise and control all of the business and affairs of the Corporation. The President presides at all meetings of the members of the Board of Directors. The President may sign, with the Secretary or any other officer authorized by the Board of Directors, any promissory notes, deeds, mortgages, leases, contracts, or other instruments that the Board of Directors has authorized for execution, except in the cases where the signing and execution is expressly delegated by the Board of Directors or by these Bylaws to some other officer or agent of the Corporation, or is required by law to be otherwise signed or executed. The President will co-sign all checks or other deposit account withdrawals in excess of five thousand dollars (\$5,000.00) and, in general, will perform all duties incident to the office of President and any other duties as the Board of Directors may prescribe from time to time.
- F. Vice President: In the absence of the President or in the event of the President's death, inability or refusal to act, the Vice President will perform the duties of the President. When so acting, the Vice

President has all the powers of and is subject to all the restrictions on the President. The Vice President will perform other duties as the President or the Board of Directors may assign.

G. Secretary: The Secretary will attend all meetings of the Board of Directors and will prepare and maintain minutes of those meetings. The Secretary has custody of and shall protect all executed deeds, leases, agreements and other legal documents and records to which the Corporation is a party or by which it is legally affected. The Secretary will, in general, perform all duties incident to the office of

Secretary and any other duties assigned to the Secretary by the President or the Board of Directors.

H. Treasurer: The Treasurer is the principal financial officer of the Corporation and has charge and custody of and is responsible for all funds of the Corporation. The Treasurer will sign all checks and promissory notes of the Corporation and will receive and give receipts for moneys due and payable to the Corporation from any source and deposit all moneys in the name of the Corporation in banks, trust companies or other depositories as selected by the Board of Directors. The Treasurer will keep or cause to be kept, adequate and correct accounts of the Corporation, including accounts of its assets, liabilities, receipts and disbursements. The Treasurer will submit to the Board of Directors and the President, when required, statements of the financial affairs of the Corporation. The Treasurer will, in general, perform all financial duties incident to the office of Treasurer and any other duties assigned to the Treasurer by the President or the Board of Directors.

I. Officer Conflict of Interest: Any officer who has an interest in a contract or other transaction presented to the Board or a committee for authorization, approval, or ratification shall make a prompt and full disclosure of his or her interest to the Board or committee prior to its acting on the contract or transaction. The disclosure must include any relevant and material facts known to the officer about the contract or transaction that might reasonably be construed to be adverse to the Corporation's interest.

## V. STAFF

A. Employment: The Board of Directors has authority to employ a School Leader and any other staff as the Corporation may reasonably require from time to time.

- B. Terms of Employment: The Board of Directors must approve all compensation paid to a staff person.

Compensation for staff personnel must be reasonable and will be based on the following factors:

1. The amount and type of compensation received by others in similar positions;
2. The compensation levels paid in our particular geographic community;
3. The amount of time the individual spends carrying out the duties of his or her position;
4. The expertise and other pertinent background of the individual;
5. The size and complexity of the organization; and
6. The need of the organization for the services of the particular individual.

The terms and conditions of employment of the staff may be set forth in a written contract approved by the Board of Directors and signed by the Corporation and the staff person.

- C. Staff Conflict of Interest: Any staff person who has an interest in a contract or other transaction presented to the Board or a committee for authorization, approval, or ratification shall make a prompt and full disclosure of his or her interest to the Board or committee prior to its acting on the contract or transaction. This disclosure must include any relevant and material facts known to the person about the contract or transaction that might reasonably be construed to be adverse to the Corporation's interest.

## VI. MISCELLANEOUS

- A. Indemnification of Officers, Directors, Employees, and Agents: The Corporation may indemnify Directors, officers, employees, and agents of the Corporation to the extent permitted by, and in accordance with the law. The Corporation may purchase and maintain insurance on behalf of any person who is or was a Director, officer, employee or agent of the Corporation against any liability asserted against the person or incurred by the person in any such capacity or arising out of the person's status as a Director, officer, employee or agent.
- B. Dissolutoin: Upon dissolution (1) the remining 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.

C. Books and Records: The Corporation shall keep and maintain, at its registered office or principal place of business:

1. Correct and complete books and records of account;
2. Minutes of the proceedings of its Board of Directors and committees; and
3. A record of the names and addresses of all members of the Board of Directors.

Any books, records and minutes may be in written form or in any other form capable of being converted into written form within a reasonable time.

C. Loans: No loans shall be contracted on behalf of the Corporation and no evidences of indebtedness shall be issued in its name unless authorized by a resolution of the Board of Directors. Such authority may be general or confined to specific instances.

D. Contracts: The Board of Directors may authorize any officer or officer's agent or agents of the Corporation, in addition to the officers authorized by these Bylaws, to enter into any contract or execute and deliver any instrument in the name of and on behalf of the Corporation. Such authority may be general or confined to specific instances.

E. Checks, Drafts, etc.: All checks, drafts, or other orders for the payment of money, notes or other evidences of indebtedness issued in the name of the Corporation shall be signed by the officer or officer's agent or agents of the Corporation as provided for in these Bylaws or in the manner determined by the Board of Director.

F. Deposits: All funds of the Corporation not otherwise employed shall be deposited to the credit of the Corporation in the banks, trust companies, or other depositories selected by the Board of Directors.

G. Gifts: The Board of Directors may accept on behalf of the Corporation any contribution, gift, bequest, or devise for the general purposes of or for any special purpose of the Corporation.

H. Annual Financial Statements: The officers of the Corporation shall cause a balance sheet as of the closing date of the last fiscal year, together with a statement of income and expenditures for the



year ending on that date, to be prepared and presented to the Directors at each annual meeting of the Board of Directors of the Corporation.

- I. Fiscal Year: The fiscal year of the Corporation begins on the first day of July and ends on the last day of June each year, except that the first fiscal year will begin on the date of incorporation.
- J. Regulation of Internal Affairs: The internal affairs of the Corporation are regulated as set forth in these Bylaws to the extent that these Bylaws are lawful.
- K. Electronic Transmissions: Subject to any guidelines and procedures that the Board of Directors may adopt from time to time, the terms “written” and “in writing” as used in these Bylaws include any form of recorded message capable of comprehension by ordinary visual means, that is suitable for the receipt, retention, retrieval, and reproduction of information by the recipient, whether by facsimile, texting, email, or other electronic transmissions.
- L. Amendments: These Bylaws may be altered, amended or repealed and new Bylaws may be adopted by the Board of Directors of the Corporation at any regular or special meeting. In all cases, these Bylaws shall be compliant with Indiana and federal statutes and rules governing charter schools. In cases of any current or future conflict, the statute or rule shall govern.

The undersigned, being the Acting Secretary of the Corporation, does hereby certify that the foregoing Bylaws were duly adopted as the official Bylaws of the Corporation by unanimous consent of the Directors of the Corporation on \_\_\_\_\_.

---

Name



### Purpose

The purpose of this policy is to assist Athlos Academy of Indiana’s school board members in understanding the role of individuals board members and the contribution that each member must make to develop an effective, ethical, and responsible Governing Board.

### Policy

- A. AS A MEMBER OF THE GOVERNING BOARD I WILL:
  - 1. Attend Governing Board meetings prepared for discussion of the agenda items.
  - 2. Listen to the opinions of others.
  - 3. Appreciate the merit of their work.
  - 4. Vote my conscience after informed discussion, unless I abstain because a conflict of interest exists.
  - 5. Be motivated only by a desire to serve the students of Athlos Academy of Indiana. 6. Attempt to inform myself on the proper duties and functions of a Governing Board member.
  
- B. IN PERFORMING THE PROPER FUNCITONS OF A GOVERNING BOARD MEMBER I WILL:
  - 1. Spend adequate time in Governing Board meetings on educational policies.
  - 2. Remember the legal responsibility that is mine is to establish policy—not to implement policy.
  - 3. Consider myself a trustee of public education and do my best to protect, conserve, and advance its progress.
  - 4. Work through the administration employees of the Governing Board—not over or around them.
  - 5. Recognize that it is my responsibility, together with other Governing Board members, to see that the school is properly run, not to run it myself.
  
- C. TO MAINTAIN RELATIONS WITH OTHER MEMBERS OF THE GOVERNING BOARD I WILL:
  - 1. Respect the right of others to have and express opinions.
  - 2. Recognize that authority rests with the Governing Board in legal session—not with the individual members of the Governing Board except as authorized by law.
  - 3. Make no disparaging remarks, in or out of Governing Board meetings, about other members of the Governing Board or their opinions.
  - 4. Recognize that to promise in advance of a meeting how I will vote on any proposition is to close my mind and agree not to think through other points of view which may be presented to the meeting.

5. Make decisions in Governing Board meetings only after all sides of debatable questions have been presented.
6. Insist that special committees be appointed to serve only in an advisory capacity to the Governing Board.

D. IN MEETING MY RESPONSIBILITIES TO MY COMMUNITY I WILL:

1. Attempt to appraise both the present and future educational needs of the school.
2. Attempt to obtain adequate financial support for the school program.
3. Interpret the needs and attitudes of the community and do my best to translate them into the educational program of the school.
4. Insist that business transactions of the school be on an ethical, open, and above board basis.
5. Avoid conflicts of interest and refrain from using my Governing Board position for personal gain.

E. IN WORKING WITH THE SCHOOL LEADER AND SCHOOL STAFF I WILL:

1. Hold the School Leader responsible for the administration of the school.
2. Give the School Leader authority commensurate with the responsibility.
3. Assure that the school will be administered by the best professional personnel available.
4. Participate in Governing Board action after considering the recommendation of the School Leader and only after the School Leader has furnished adequate information supporting the recommendation.
5. Insist the School Leader keep the Governing Board adequately informed.
6. Delegate details of Governing Board action to the School Leader .
7. Give the School Leader counsel and advice.
8. Recognize the status of the School Leader as an ex officio member of the Governing Board.
9. Refer all complaints to the proper administrative officer or insist that they be presented in writing to the whole Governing Board for proper referral.
10. Present any personal criticisms of employees to the School Leader .
11. Provide support for the School Leader and employees of the school so they may perform their proper functions on a professional level.

F. IN FULFILLING MY LEGAL OBLIGATIONS AS A GOVERNING BOARD MEMBER I WILL:

1. Comply with all federal, state and local laws relating to my role as a Governing Board member.
2. Comply with all school policies as adopted by the Governing Board.
3. Abide by all rules and regulations as promulgated by the State of Indiana and the Indiana Charter School Board and other federal and state agencies with jurisdiction over schools.
4. Take no private action that will compromise the Governing Board or school administration.

5. Recognize that school business may be legally transacted only in an open meeting of the Governing Board.

**CODE OF ETHICS POLICY AGREEMENT**

I, \_\_\_\_\_ , understand that as a member of the Athlos Academy

Governing Board, I have a legal and moral responsibility to ensure that the organization does the best work possible in pursuit of its goals. I believe in the purpose and the mission of the school, and I will act responsibly and prudently as its steward. I will avoid being placed in a position of conflict of interest and will refrain from using my board position for personal gain. I pledge to take no private action that will compromise the Governing Board or school and I will respect the confidentiality of information that is privileged under applicable laws. I have read, understand, and am willing to comply with the roles and responsibilities of Governing Board members.

\_\_\_\_\_  
*Signed Dated*

\_\_\_\_\_



DRAFT Conflict of Interest  
Athlos Academy of Indiana  
An Indiana Nonprofit Corporation  
Board Policy [Insert Policy #]  
Approved: [Insert Date]  
Revised: \_\_\_\_\_

## Conflict of Interest Policy

### For Officers and Board Members of a Committee with Board Authority

#### Article I – Purpose

1. The purpose of this Board conflict of interest policy is to protect the interests of the Indiana Nonprofit when it is contemplating entering into a transaction or arrangement that might benefit the private interests of an officer or member, or might result in a possible excess benefit transaction.
2. 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 principal officer or member of a committee with governing board delegated powers, who has a direct or indirect financial interest, as defined below, is an interested person.
2. Financial interest – A person has a financial interest if the person has, directly or indirectly, through business, investment, or family:
  - a. An ownership or investment interest in any entity with which the Indiana Nonprofit has a transaction or arrangement,
  - b. A compensation arrangement with any entity or individual with which the Indiana nonprofit has a transaction or arrangement, or
  - c. A potential ownership or investment interest in, or compensation arrangement with, any entity of individual with which the Indiana Nonprofit is negotiating a transaction or arrangement.

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

A financial interest is not necessarily a conflict of interest. A person who has a financial interest may have a conflict of interest only if the Board or Executive Committee decides that a conflict of interest exists, in accordance with this policy.

#### 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 Board or Executive Committee.
2. Recusal of Self – Any member may recuse himself or herself at any time from involvement in any decision or discussion in which the director believes he or she has or may have a conflict of interest, without going through the process for determining whether a conflict of interest exists.
3. 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 Board or Executive Committee meeting while the determination of a conflict of interest is discussed and voted upon. The remaining Board or Executive Committee members shall decide if a conflict of interest exists.
4. Procedures for Addressing the Conflict of Interest
  - a. An interested person may make a presentation at the Board or Executive Committee meeting, but after the presentation, he/she shall leave the meeting during the discussion of, and the vote on, the transaction or arrangement involving the possible conflict of interest.
  - b. The Chairperson of the Board or Executive Committee shall, if appropriate, appoint a disinterested person or committee to investigate alternatives to the proposed transaction or arrangement.
  - c. After exercising due diligence, the Board or Executive Committee shall determine whether the nonprofit can obtain with reasonable efforts a more advantageous transaction or arrangement from a person or entity that would not give rise to a conflict of interest.
  - d. If a more advantageous transaction or arrangement is not reasonably possible under circumstances not producing a conflict of interest, the Board or Executive Committee shall determine by a majority vote of the disinterested directors whether the transaction or arrangement is in the nonprofit'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.
5. Violations of the Conflicts of Interest Policy
  - a. If the Board or Executive 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 Board or Executive 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 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 Board's or Executive 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**

- a. A voting member of the Board who receives compensation, directly or indirectly, from the nonprofit for services is precluded from voting on matters pertaining to that member's compensation.
- b. A voting member of any committee whose jurisdiction includes compensation matters and who receives compensation, directly or indirectly, from the nonprofit for services is precluded from voting on matters pertaining to that member's compensation.
- c. No voting member of the Board or any committee whose jurisdiction includes compensation matters and who receives compensation, directly or indirectly, from the nonprofit, either individually or collectively, is prohibited from providing information to any committee regarding compensation.

#### **Article VI – Periodic Reviews**

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

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

#### **Article VII – Use of Outside Experts**

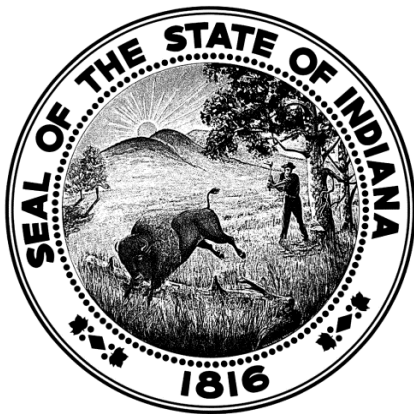
When conducting the periodic reviews as provided for in Article VII, the nonprofit may, but need not, use outside advisors. If outside experts are used, their use shall not relieve the Board of its responsibility for ensuring periodic reviews are conducted.



State of Indiana  
Office of the Secretary of State  
Certificate of Incorporation  
of  
**ATHLOS ACADEMY OF INDIANA 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 Saturday, September 02, 2017.



In Witness Whereof, I have caused to be affixed my signature and the seal of the State of Indiana, at the City of Indianapolis, September 05, 2017

*Connie Lawson*

CONNIE LAWSON  
SECRETARY OF STATE

201709021212451 / 7689155

To ensure the certificate's validity, go to <https://bsd.sos.in.gov/PublicBusinessSearch>

**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** 201709021212451  
**BUSINESS TYPE** Domestic Nonprofit Corporation  
**BUSINESS NAME** ATHLOS ACADEMY OF INDIANA INC.  
**PRINCIPAL OFFICE ADDRESS** 970 Fort Wayne Ave. , Apt. 207, Indianapolis, IN, 46202, USA

**ARTICLE II - REGISTERED OFFICE AND ADDRESS**

**NAME** Ashley Gibson  
**ADDRESS** 970 Fort Wayne Ave., 207, Indianapolis, IN, 46202, USA

**ARTICLE III - PERIOD OF DURATION AND EFFECTIVE DATE**

**PERIOD OF DURATION** Perpetual  
**EFFECTIVE DATE** 09/02/2017  
**EFFECTIVE TIME** 02:47PM

**ARTICLE IV - PRINCIPAL(S)**

No Principal on record.

**ARTICLE V - INCORPORATOR(S)**

**ARTICLE VI - GENERAL INFORMATION**

**STATEMENT OF PURPOSE**

Athlos Academy of Indiana's (AAI) mission is to provide a high-quality K-8 educational model based on Athlos Academies, the education service provider, three foundational pillars of Prepared Mind, Performance Character, and Healthy Body for students and families in Southeastern Marion County. The vision of the school is to foster students who will be prepared to embrace all challenges in life and who have developed critical thinking and problem-solving skills while achieving academic success. AAI believes that children have the best opportunity for success in college, career, and life when they are supported by high-quality programs in the three interconnected pillar areas.

**TYPE OF CORPORATION** Public benefit corporation, which is organized for a public or charitable purpose

**WILL THE CORPORATION HAVE MEMBERS?** No

**DISTRIBUTION OF ASSETS**

Athlos Academy of Indiana's Articles of Incorporation will include how Distribution of Assets upon Dissolution will be handled. If the Board of Directors would vote to dissolve the Corporation, the Internal Revenue Service (IRS) would need to be notified as laid out in Internal Revenue Code Section 6043(b) and Treasury Regulations Section 1.6043-3 to ensure the IRS is aware of the current proceedings of the corporation. Additionally, Athlos Academy of Indiana will also immediately comply with the dissolution requirements of the Indiana Nonprofit Corporation Act.

**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 **September 2, 2017**

Business ID : 201709021212451

Filing No : 7689155

Date of this notice: 09-05-2017

Employer Identification Number:  
82-2681102

Form: SS-4

Number of this notice: CP 575 A

ATHLOS ACADEMY OF INDIANA INC  
970 FORT WAYNE AVE APT 207  
INDIANAPOLIS, IN 46202

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 82-2681102. 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.

Based on the information received from you or your representative, you must file the following form(s) by the date(s) shown.

Form 941	04/30/2018
Form 940	01/31/2019

If you have questions about the form(s) or the due date(s) shown, you can call us at the phone number or write to us at the address shown at the top of this notice. If you need help in determining your annual accounting period (tax year), see Publication 538, *Accounting Periods and Methods*.

We assigned you a tax classification based on information obtained from you or your representative. It is not a legal determination of your tax classification, and is not binding on the IRS. If you want a legal determination of your tax classification, you may request a private letter ruling from the IRS under the guidelines in Revenue Procedure 2004-1, 2004-1 I.R.B. 1 (or superseding Revenue Procedure for the year at issue). Note: Certain tax classification elections can be requested by filing Form 8832, *Entity Classification Election*. See Form 8832 and its instructions for additional information.

If you are required to deposit for employment taxes (Forms 941, 943, 940, 944, 945, CT-1, or 1042), excise taxes (Form 720), or income taxes (Form 1120), you will receive a Welcome Package shortly, which includes instructions for making your deposits electronically through the Electronic Federal Tax Payment System (EFTPS). A Personal Identification Number (PIN) for EFTPS will also be sent to you under separate cover. Please activate the PIN once you receive it, even if you have requested the services of a tax professional or representative. For more information about EFTPS, refer to Publication 966, *Electronic Choices to Pay All Your Federal Taxes*. If you need to make a deposit immediately, you will need to make arrangements with your Financial Institution to complete a wire transfer.

The IRS is committed to helping all taxpayers comply with their tax filing obligations. If you need help completing your returns or meeting your tax obligations, Authorized e-file Providers, such as Reporting Agents (payroll service providers) are available to assist you. Visit the IRS Web site at [www.irs.gov](http://www.irs.gov) for a list of companies that offer IRS e-file for business products and services. The list provides addresses, telephone numbers, and links to their Web sites.

To obtain tax forms and publications, including those referenced in this notice, visit our Web site at [www.irs.gov](http://www.irs.gov). If you do not have access to the Internet, call 1-800-829-3676 (TTY/TDD 1-800-829-4059) or visit your local IRS office.

**IMPORTANT REMINDERS:**

- \* Keep a copy of this notice in your permanent records. **This notice is issued only one time and the IRS will not be able to generate a duplicate copy for you.** You may give a copy of this document to anyone asking for proof of your EIN.
- \* Use this EIN and your name exactly as they appear at the top of this notice on all your federal tax forms.
- \* Refer to this EIN on your tax-related correspondence and documents.

If you have questions about your EIN, you can call us at the phone number or write to us at the address shown at the top of this notice. If you write, please tear off the stub at the bottom of this notice and send it along with your letter. If you do not need to write us, do not complete and return the stub.

Your name control associated with this EIN is ATHL. You will need to provide this information, along with your EIN, if you file your returns electronically.

Thank you for your cooperation.

Keep this part for your records. CP 575 A (Rev. 7-2007)

Return this part with any correspondence so we may identify your account. Please correct any errors in your name or address.

CP 575 A

9999999999

Your Telephone Number ( ) -          Best Time to Call          DATE OF THIS NOTICE: 09-05-2017  
 \_\_\_\_\_  
 EMPLOYER IDENTIFICATION NUMBER: 82-2681102  
 FORM: SS-4    NOBOD

INTERNAL REVENUE SERVICE  
 CINCINNATI OH 45999-0023  


ATHLOS ACADEMY OF INDIANA INC  
 970 FORT WAYNE AVE APT 207  
 INDIANAPOLIS, IN 46202

## Attachment 13: Statement of Assurances

Statement of Assurances is included on the following pages.

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.

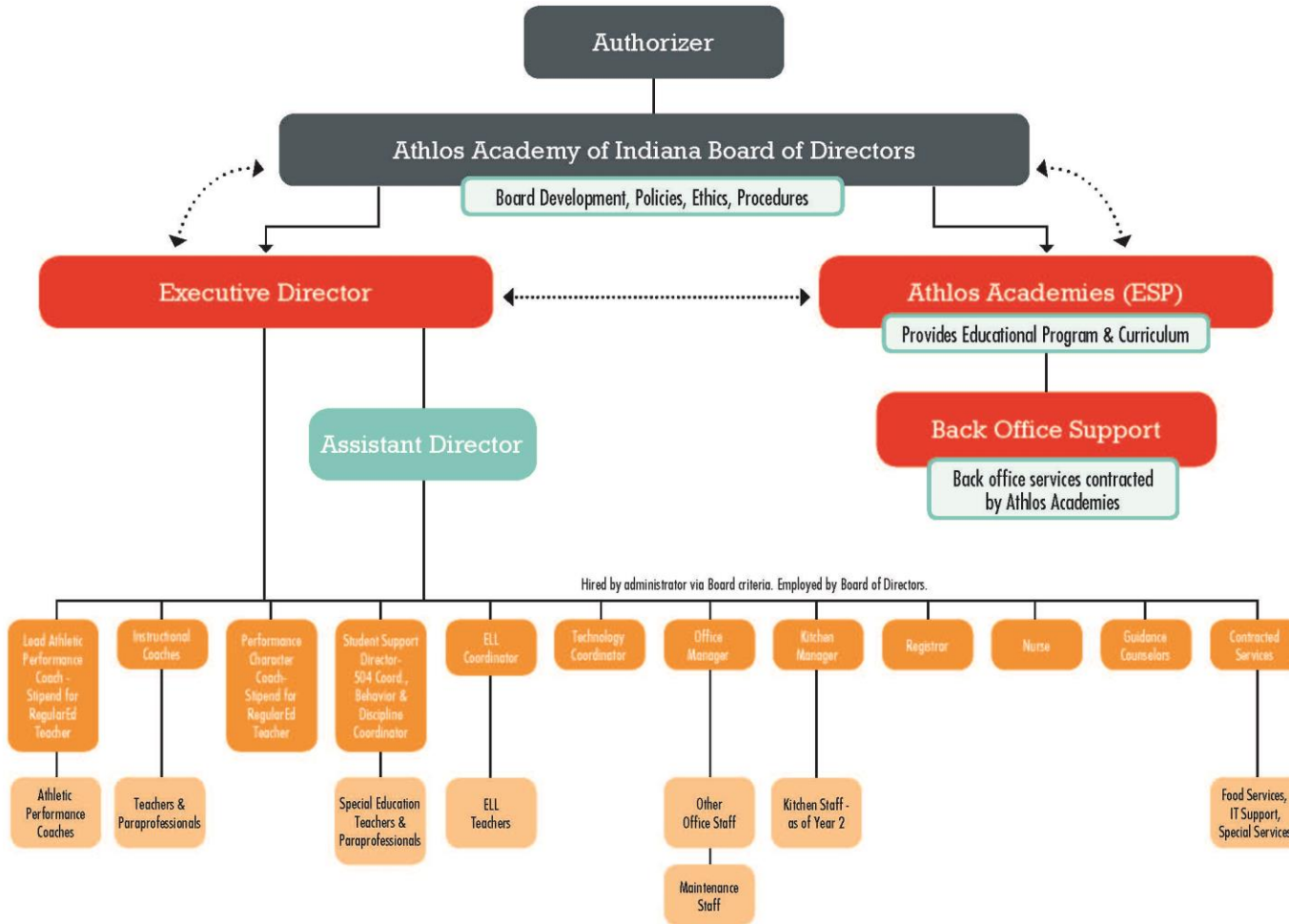
**Signature from Authorized Representative of the Charter School Applicant**

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.

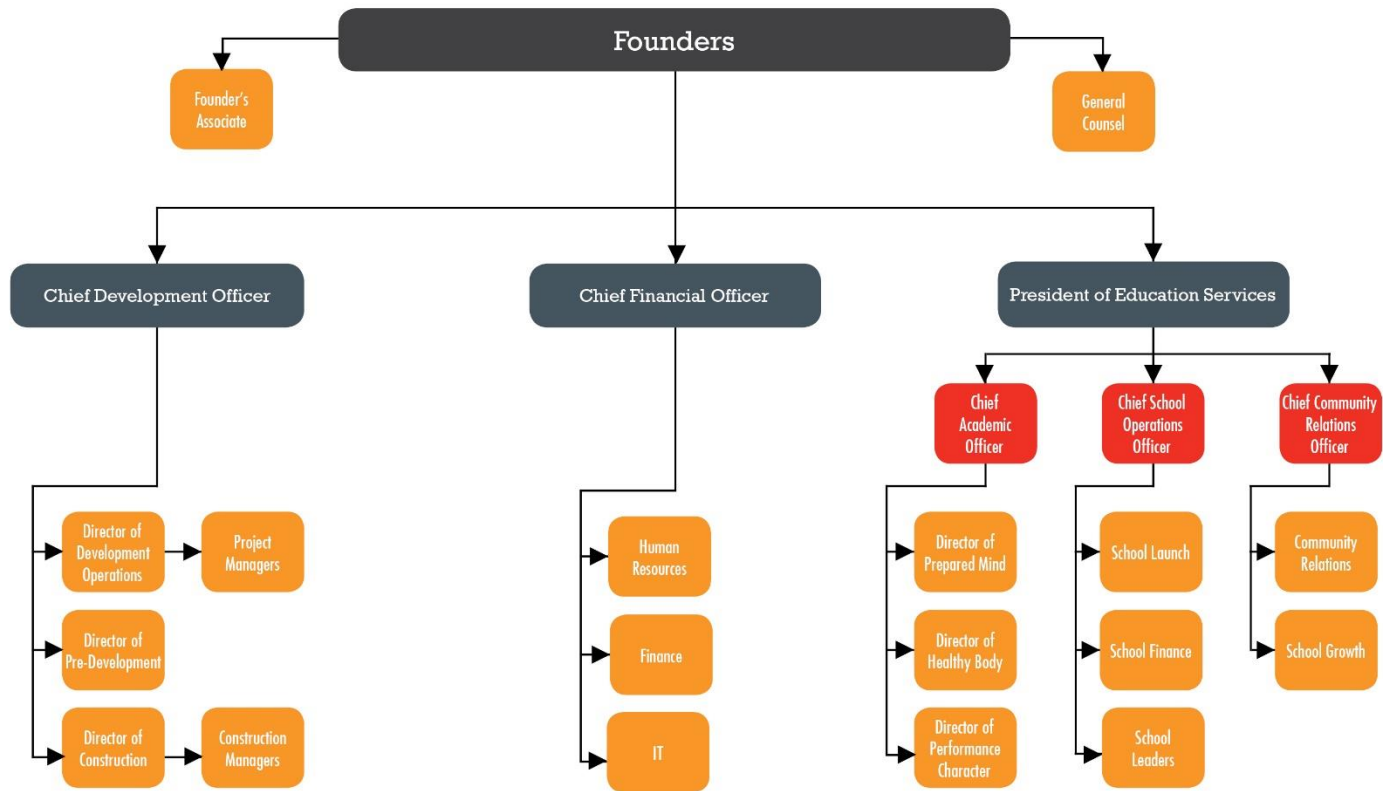
<p><b>PRINT NAME &amp; TITLE</b> ASHLEY GIBSON Director, Government Relations Global Policy and External Relations</p>	<p><b>DATE</b> 9/1/17</p>
<p><b>SIGN NAME</b> <i>Ashley Gibson</i></p>	



# Attachment 14: Organizational Chart



# Athlos Academies ESP Organizational Chart



## Attachment 15: Projected Staffing

	Year 1	Year 2	Year 3	Year 4	Year 5
Number of elementary schools K-8	1	1	1	1	1
Total Schools	1	1	1	1	1
Student enrollment	1220	1220	1220	1220	1220

<b>Elementary School Staff (K-8)</b>	Year 1	Year 2	Year 3	Year 4	Year 5
School Leader	1	1	1	1	1
Assistant Administrator	1	1	1	1	1
Technology Coordinator	1	1	1	1	1
Guidance Counselor	2	2	2	2	2
Nurse	1	1	1	1	1
Regular Education Teachers	53	53	53	53	53
Sports Performance Coaches	6	6	6	6	6
Instructional Coaches	2	2	2	2	2
Office Manager	1	1	1	1	1
Office Staff	4	4	4	4	4
Registrar	1	1	1	1	1
Maintenance Staff (PT and FT)	3	3	3	3	3
Kitchen Manager	1	1	1	1	1
Kitchen Staff (PT)	7	7	7	7	7
Student Support Director	1	1	1	1	1
Special Education Teachers	5	5	5	5	5
Para-professionals	6	6	6	6	6
ELL Teacher	2	2	2	2	2
ELL Coordinator	1	1	1	1	1

## Attachment 16: Start-Up Plan

The following pages show the detailed launch task list from approval to opening day.



# Athlos School Launch Checklist

Within 90 Days of Approval

Target Completion Date: \_\_\_\_\_

✓	Task Description and Resources	Target Date
<input type="checkbox"/>	<b>Hire Lead School Administrator and Principal Position.</b> Athlos Academies will provide the interview process and job posting, and will be a key participant in the selection process.	
<input type="checkbox"/>	<b>Adopt board bylaws and conflict of interest policy.</b> Athlos Academies will provide both documents.	
<input type="checkbox"/>	<b>File Articles of Incorporation with IRS to request 501c3 status.</b> Athlos Academies will provide this document and assist with the filing process.	
<input type="checkbox"/>	<b>Adopt Board Meeting Calendar and Board Development Schedule.</b> Athlos Academies will provide sample documents.	
<input type="checkbox"/>	<b>Join applicable charter network associations.</b> Athlos Academies can assist with this research as needed.	
<input type="checkbox"/>	<b>Finalize management services agreement, lease agreement, and licensing agreement with Athlos Academies.</b> Athlos Academies will provide these documents. Board President will need to ensure these are vetted by an outside attorney.	
<input type="checkbox"/>	<b>Vote in President, Vice, Secretary and Treasurer (in compliance with policy stated in Bylaws).</b> Athlos Academies will provide job descriptions.	
<input type="checkbox"/>	<b>Obtain Board Liability Insurance.</b> Athlos Academies may be able to provide various contacts; Board President will need to engage and secure this insurance.	
<input type="checkbox"/>	<b>Complete Website Compliance Check list and verify Online Enrollment Form is accurate and functional.</b> Athlos Academies will manage the school's website and will provide the compliance checklist.	
<input type="checkbox"/>	<b>Finalize registration paperwork and processing system; home language survey, and oversee translation into other languages as necessary.</b> Athlos Academies will provide sample registration form and system flow chart.	
<input type="checkbox"/>	<b>Identify first open enrollment time period, approve admissions and lottery policy, and set lottery date.</b> Athlos Academies will provide recommended dates and policy sample. Statutory time frames may apply to length of enrollment period, length of time advertised prior to lottery date, or location of advertisements.	
<input type="checkbox"/>	<b>Contract or Hire for Business Management Services.</b> Athlos Academies may be able to offer these services; if contracted externally, most will delay payment until cash is flowing.	
<input type="checkbox"/>	<b>Begin Marketing and Recruitment Campaign.</b> Athlos Academies will provide design work and assist the Principal with strategizing, and may assist with facilitation of portions of the marketing efforts (and an enrollment projection plan). Principal will want to meet with the Athlos Team to review specifics.	
<input type="checkbox"/>	<b>Retain Legal Counsel.</b> Board of Directors should engage with a legal advisor (separate from any attorney who may be a board member) for the purpose of reviewing contracts. Many will do this with delayed payments.	





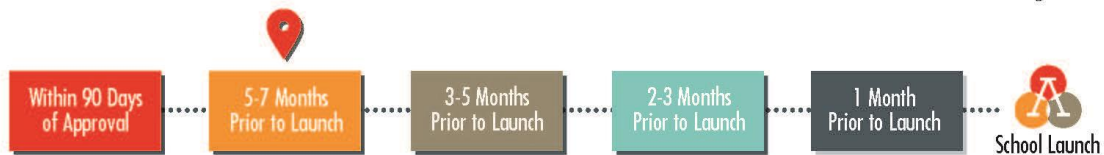
# Athlos School Launch Checklist

5-7 Months Prior to Launch

Target Completion Date: \_\_\_\_\_

✓	Task Description and Resources	Target Date
<input type="checkbox"/>	<b>Workshop Upcoming School Year Budget and present to Board of Directors for Review.</b> Work with back office service provider to approve start up year budget and first year budget. This will be formally adopted closer to the start of school, but finance committee should present a draft to the full board for review early.	
<input type="checkbox"/>	<b>Hire Faculty and Staff.</b> Athlos Academies will provide staffing plan, job descriptions, marketing collateral, and interview process flow chart. Athlos Academies attends several recruitment fairs nationally. Principal will be responsible for recruitment and hiring of all faculty and staff.	
<input type="checkbox"/>	<b>Review Board Policy, identifying any necessary changes, and adopt the policies.</b> Athlos Academies will provide a sample packet of Board Policies.	
<input type="checkbox"/>	<b>Evaluate and Purchase (if necessary) student data collection systems (such as jump rope or Open SIS) Ensuring clean communication with state systems for reporting. Board will need to vote on the purchase if a free state provided option is not acceptable.</b> Athlos Academies can provide recommendations. Principal is responsible for research, cost analysis, making recommendation to Board, and then ensuring faculty and staff training and reporting compliance.	
<input type="checkbox"/>	<b>Ensure all accounts are created and that start-up budgets are on schedule.</b> Work with back office provider to closely monitor start up funds.	
<input type="checkbox"/>	<b>Secure insurance policies (workers comp, liability, etc.).</b> Work with back office provider to ensure all items are in place. Board may need to vote on cost.	
<input type="checkbox"/>	<b>Adopt formal signature policies, finalize financial reporting templates, P.O. forms and policies, and define investment and saving strategies.</b> Athlos Academies will provide sample reporting template, PO forms, and policy. Work with back office provider.	
<input type="checkbox"/>	<b>Design a secure and efficient system of data management for in-house developed and confidential documents (physical records, enrollment paperwork, personnel records).</b> Athlos Academies will provide a sample compliance checklist and structure for student cumulative files, personnel files, and special populations files. Data management and security is the Principal's responsibility	
<input type="checkbox"/>	<b>Develop form letters/emails for enrollment process and parent communication needs.</b> Athlos Academies will provide sample text for enrollment, hiring, disciplinary, and other items.	
<input type="checkbox"/>	<b>Set up non-profit mailing status with post office.</b> Athlos Academies will assist with filing for 501c3 status, school is responsible to establish benefits thereof.	
<input type="checkbox"/>	<b>Set schedule for monthly information meetings for prospective parents and interested community members.</b> Athlos Academies will assist with providing materials and may help host one or more of these meetings.	
<input type="checkbox"/>	<b>Complete Professional Development Calendar and schedule third party trainings as well as any state required trainings.</b> Athlos Academies will provide new teacher orientations and trainings specific to the Athlos program and some instructional methods and operational expectations as well as a sample PD schedule. Principal will need to arrange for trainings on the mathematics, literacy, operational expectations and instructional methods beyond Athlos Services.	

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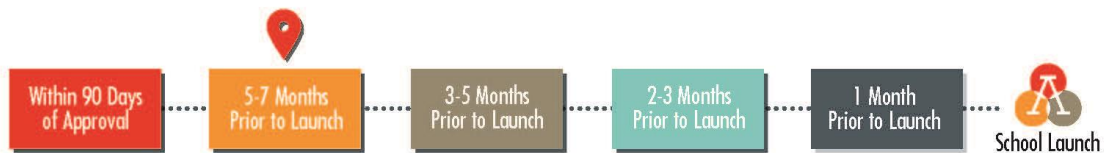
# Athlos School Launch Checklist

5-7 Months Prior to Launch

Target Completion Date: \_\_\_\_\_

✓	Task Description and Resources	Target Date
<input type="checkbox"/>	<b>Begin Ordering and Procuring Furniture with respect to the budget and construction time-line.</b> Athlos Academies will provide a sample list of materials needed to furnish the building. Principal will need to identify local sources of reclaimed furniture, used furniture, and new purchases.	
<input type="checkbox"/>	<b>Perform Lottery according to policy and advertised timeline.</b> This should take place in an open board meeting. Generally this takes place in March or April prior to opening.	
<input type="checkbox"/>	<b>(Checklist item left blank).</b> Athlos Academies can offer information about common practices.	
<input type="checkbox"/>	<b>Develop Attendance Reporting system; Review truancy policy present truancy policy to board for adoption.</b> Athlos Academies will provide a sample truancy policy and sample text for parent communication letters as well as a flow chart of attendance actions.	
<input type="checkbox"/>	<b>Develop safety procedures to track visitors and adopt a system to track volunteer hours.</b> Athlos Academies will provide a sample procedure and policy, and may be able to make recommendations about systems to track hours.	
<input type="checkbox"/>	<b>Develop Technology and Library usage agreements and policies and present to board for adoption.</b> Athlos Academies will provide sample Technology and Library usage agreements and policies.	
<input type="checkbox"/>	<b>Arrange for Lease/purchase of office equipment (copy, fax, laminator).</b>	

Page 2 of 2





# Athlos School Launch Checklist

3-5 Months Prior to Launch

Target Completion Date: \_\_\_\_\_

✓	Task Description and Resources	Target Date
<input type="checkbox"/>	<b>Create a Calendar of Deadlines (reports, grants, state requirements) and ensure resources are in place to meet those deadlines. And medical screenings.</b> Athlos Academies will provide a sample chart and can assist with local research. Principal is responsible for knowing all deadlines and meeting them appropriately.	
<input type="checkbox"/>	<b>Order Textbooks and necessary materials.</b> Athlos Academies will provide a list of required curriculum materials.	
<input type="checkbox"/>	<b>Schedule Board Meetings for upcoming school year, finalize format for board meeting minutes and agendas and ensure that resources are in place to ensure open meetings law is met.</b> Athlos Academies will provide sample formats for meeting minutes and agendas and can assist with guiding the first several meetings to ensure rules are followed. An Athlos representative will be present at all board meetings.	
<input type="checkbox"/>	<b>Identify Standing Board Committees and make Board Appointments.</b> Athlos Academies will provide job descriptions for each committee and a sample list of duties and tasks.	
<input type="checkbox"/>	<b>Design an after school program that supports homework help, tutoring, and organized play.</b> May choose to do this in house if admin feels people resources can manage it; may also seek to partner with local YMCA or Boys and Girls club.	
<input type="checkbox"/>	<b>Establish payroll and develop cash flow plan.</b> Work with back office provider to ensure all processes are in place.	
<input type="checkbox"/>	<b>Review Student Handbook and Employee Handbook, present to Board for adoption.</b> Athlos Academies will provide a sample Student Handbook and Employee Handbook.	
<input type="checkbox"/>	<b>Review Administrator Evaluation Process and Tools for Board adoption.</b> Athlos Academies will provide a job description and evaluation rubric for the Lead Administrator of the school. Athlos Academies will also provide training on the 4 tiers of implementation as well as the mission-specific goals (from the charter), and will work with the board and administration to develop a system of measures by which the administrator's effectiveness can be measured.	
<input type="checkbox"/>	<b>Review and present to Board for Adoption the school calendar and the daily schedule.</b> Athlos Academies will provide sample school calendar and the daily schedule and a statement of "non-negotiables"	
<input type="checkbox"/>	<b>Negotiate and sign for contracted services (bussing, lawn care and snow removal, maintenance).</b> Work with back office service provider to stay within budget.	
<input type="checkbox"/>	<b>Evaluate and Purchase a parent communication System (such as SchoolSpeak or a text service) Board will need to vote on the purchase.</b> Principal is responsible for research, cost analysis, making recommendation to Board, and then ensuring faculty and staff training and efficient usage of system.	
<input type="checkbox"/>	<b>Develop a plan backwards from end of year audits to ensure all reports will be prepared on time and data is collected cleanly and efficiently.</b>	
<input type="checkbox"/>	<b>Review the data analysis/benchmark/ PLC plan. Make sure enough time and guidance is provided to aim teachers toward the goals.</b>	







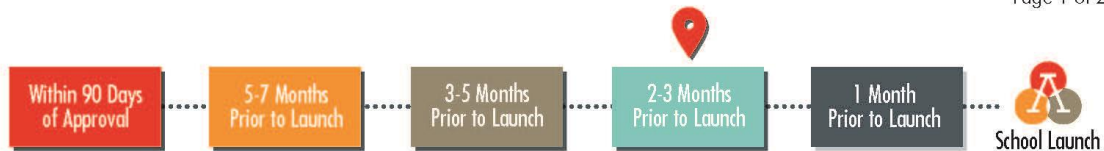
# Athlos School Launch Checklist

2-3 Months Prior to Launch

Target Completion Date: \_\_\_\_\_

✓	Task Description and Resources	Target Date
<input type="checkbox"/>	<b>Ensure all backoffice services are ready to start smoothly; finalize tracking methods the school will use to ensure operational finances.</b> Athlos Academies will provide a checklist.	
<input type="checkbox"/>	<b>Ensure enrollment process is working smoothly, and registration paperwork is processing properly.</b>	
<input type="checkbox"/>	<b>Review all incoming registration paperwork for indication of IEP and review IEP files asap to ensure services are provided on day 1 of school. May require a meeting with parents.</b> Athlos Academies will provide sample text for reaching out to parents; procedures and sample forms for IEPs and a services flow chart and continuum of services.	
<input type="checkbox"/>	<b>Review all incoming registration paperwork for indication of 504 and review all files to ensure services are provided on day 1 of school. May require a meeting with parents.</b> Athlos Academies will provide sample text for reaching out to parents; procedures, and sample forms for 504 plans and a procedural flow chart and continuum of services.	
<input type="checkbox"/>	<b>Review all incoming registration paperwork (HLS Survey) for indication of ELL needs and ensure services are provided on day 1 of school. May require a meeting with parents.</b> Athlos Academies will provide sample text for reaching out to parents; procedures, and sample forms for ELL plans and a procedural flow chart and continuum of services.	
<input type="checkbox"/>	<b>Review all incoming registration paperwork for indication of gifted and talented needs and ensure services are provided on day 1 of school. May require a meeting with parents.</b> Athlos Academies will provide sample text for reaching out to parents; procedures, and services flow chart and continuum of services for gifted and talented students.	
<input type="checkbox"/>	<b>Evaluate and Identify a vendor for food services (at least through year 1)</b> Athlos Academies may be able to make recommendations on local vendors; and can provide.	
<input type="checkbox"/>	<b>Ensure lunch service process will feed all students in a timely manner and meet all health, safety, and federal reimbursement requirements. This will require significant training with the state office of education's nutrition department.</b> Athlos Academies will provide scheduling samples that allow for workable meal rotations, staffing plans, and a list of resources for nutritional guidelines, as well as a sample kitchen equipment list for vended food.	
<input type="checkbox"/>	<b>Complete contracts with any services (food vendors, special education services, IT, etc.)</b> Athlos Academies will provide a list of services that we recommend the school contract out and may be able to assist with information on local vendors.	
<input type="checkbox"/>	<b>Request early distribution of Funds from State Department of Education if this is applicable.</b> First distributions of funds tend to be August, but for start up schools, many states allow for a July release of some funds if requested by a deadline. Principal will need to know this deadline.	
<input type="checkbox"/>	<b>Identify a PTO president and begin organizing meetings, policies and outline an annual fundraiser (in alignment with financial policies and board policies).</b> Athlos Academies will provide a sample fundraising policy and a sample PTO bylaws document.	

Page 1 of 2





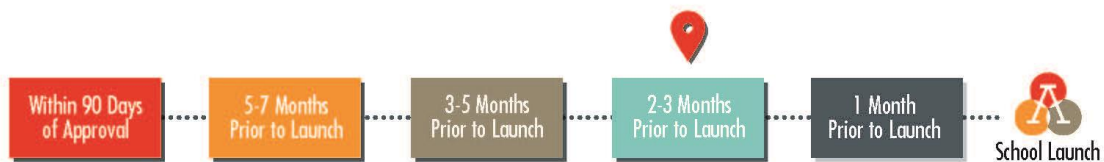
# Athlos School Launch Checklist

2-3 Months Prior to Launch

Target Completion Date: \_\_\_\_\_

✓	Task Description and Resources	Target Date
<input type="checkbox"/>	<b>Hire lead office staff and ensure training on data entry, enrollment/registration/ customer service, emergencies, medicine, and file confidentiality.</b>	
<input type="checkbox"/>	<b>Set up Data management system with all student data. And set up parent communication system separately if necessary.</b>	
<input type="checkbox"/>	<b>Place all orders for furniture no later than early July (depending on shipping these timelines are longer than you think - preferred order date is in May).</b>	
<input type="checkbox"/>	<b>Hold Public Budget Hearing and adopt budget.</b> Work with back office service provider to ensure budget is ready.	
<input type="checkbox"/>	<b>Ensure that immunization records are verified and collected appropriately.</b> Athlos Academies will provide a checklist for registration processing that will include this time.	
<input type="checkbox"/>	<b>Review teacher classroom budgets and purchasing procedures with each teacher.</b> Athlos Academies will provide a sample procedure.	
<input type="checkbox"/>	<b>Ensure all employees are enrolled in appropriate benefits, including health, life, social security, unemployment and retirement.</b> Work with back office provider to ensure payroll and benefits are ready to run smoothly.	
<input type="checkbox"/>	<b>Verify all background checks are complete for paras and staff and that all personnel files are complete.</b>	
<input type="checkbox"/>	<b>Finalize training schedules for all employees (including paras and non-instructional staff).</b> Athlos Academies will provide a sample training schedule for all employees.	
<input type="checkbox"/>	<b>Prepare parent and student orientation materials.</b> Athlos Academies will provide standard online tutorials for parents to view on or off campus.	
<input type="checkbox"/>	<b>Ensure all staff have computers, email accounts, and connectivity has been tested.</b>	
	<b>Design (or follow state requirements) for teacher mentorship training, particularly for teachers in their first 3 years in the classroom.</b>	
	<b>Work with PTO president to develop classroom emergency kits and system for preparing these packs.</b> Athlos Academies will provide a sample list of items.	
	<b>Develop awards and ceremony schedule.</b>	
	<b>Work with Instructional Guides to review coaching cycles and evaluation tools.</b> Athlos Academies will provide a sample procedure and policy for teacher coaching cycles as well as a list of resources and sample evaluation tools. Ongoing training and mentorship for Instructional Guides is provided by Athlos Academies as well.	

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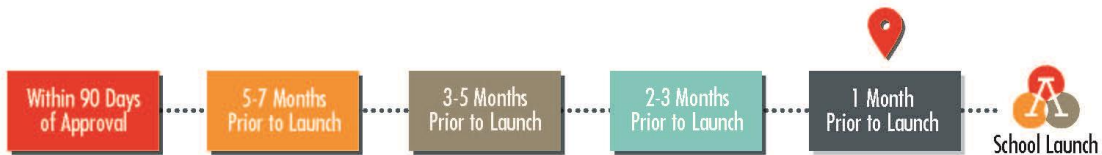


# Athlos School Launch Checklist

1 Month Prior to Launch

Target Completion Date: \_\_\_\_\_

✓	Task Description and Resources	Target Date
<input type="checkbox"/>	<b>Ensure that all IEP files have been received and that services are ready to go.</b>	
<input type="checkbox"/>	<b>Ensure all supplies are ordered and office/maintenance closets are stocked, staff trained on hazardous materials handling.</b>	
<input type="checkbox"/>	<b>Prepare documents, emails, and traffic flow plan for back to school night (schedules, free/reduced lunch forms, PTO registration, donations, lunch \$, fees, tech/library agreements, supply list, class rosters, etc.)</b> Please contact Athlos Academies to review which documents can be provided for this event. Much of this information can be collected via Google Forms.	
<input type="checkbox"/>	<b>Make arrangements for volunteer "Move In" Day(s); ensuring any furniture assembly.</b>	
<input type="checkbox"/>	<b>Receive all equipment, materials, and supplies and ensure that all inventory is verified against shipping receipts and P.O.s. Develop and execute a system to tag and track assets.</b> Athlos Academies will provide a sample procedure and template for tracking equipment.	
<input type="checkbox"/>	<b>Review and adopt crisis plan and emergency procedures. Post evacuation maps and emergency procedure manuals in all appropriate places throughout the school.</b> Athlos Academies will provide a sample crisis plan, evacuation maps, and emergency procedure classroom and office manuals.	
<input type="checkbox"/>	<b>Ensure all required laws are posted throughout the building (MSDS, OSHA, etc.)</b> Athlos Academies will provide a list of common requirements - this will not be all encompassing.	
<input type="checkbox"/>	<b>Conduct a safety review of grounds and ensure all equipment is working properly (HVAC, Fire Safety, Sprinkler System, crashbars, locks, etc.)</b> Athlos Academies will provide a sample quarterly maintenance and monthly safety checklists.	
<input type="checkbox"/>	<b>Finalize training schedules for all employees (including paras and non-instructional staff) -</b> Athlos Academies will provide a sample training schedule for all employees	
<input type="checkbox"/>	<b>Ensure online payment functions are working properly. Send email to parents with Back to School Night information and access to forms to fill out (as Google Form or printed)</b> Please contact Athlos Academies to review which documents can be provided for this event. Much of this information can be collected via Google Forms.	
<input type="checkbox"/>	<b>Ensure all PD is provided for teachers.</b> Athlos Academies will provide a sample list of trainings and access to some resources (please contact).	



## Attachment 17: Insurance Coverage

The following pages show the statement of insurance projection. It is important to note that this is one option the governing board is considering. Upon approval, the governing board will review this policy option and will formally vote to accept the policy.



August 30, 2017

Mr. Jonathan Gillen  
Athlos Academy of Indiana  
918 W Idaho Street  
Boise, ID, 83702

**RE: Insurance Coverage for Athlos Academy of Indiana  
Broker of Record – Arthur J. Gallagher & Co.**

Dear Mr. Gillen:

We are pleased to provide insurance services for Athlos Academy of Indiana. 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, United States Fire 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 Athlos Academy of Indiana, 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 Workers' Compensation Part II (Employers' Liability)</b>	As specified by Indiana Statutes \$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>Fiduciary Liability</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</b>	
Employee Dishonesty	\$1,000,000 per occurrence
Forgery or Alteration	\$1,000,000 per occurrence
Inside Premises – Theft of Monies & Securities	\$1,000,000 per occurrence
Outside the Premises	\$1,000,000 per occurrence
Computer Fraud	\$1,000,000 per occurrence
Money Orders/Counterfeit Papers	\$1,000,000 per occurrence
<b>Bonds</b>	Can secure a Treasurers Bond, when needed
<b>Property and Boiler Machinery Coverage</b>	Blanket Limits as needed, 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* (including or excluding football)</b>	Primary \$25,000 CAT at \$1,000,000 or \$5,000,000
<b>Cyber Security Liability**</b>	\$500,000 per loss or claim/aggregate limit
<b>Coverage</b>	<b>Limit</b>
<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.	
**Recommended coverage, however may not be required by charter authorizer	

**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 your authorizer, the Indianapolis Office of Education and Innovation.

<b>Coverage</b>	<b>Year 1 Premium Indication</b>
General Liability/Abuse/Crime/Auto/Employee Benefits/Educators E&O	\$ 17,843
Directors & Officers / Employment Practices	\$ 3,154
Property (including building)	\$ 29,000
Cyber Liability	\$ 2,500
Excess \$10 million Limits (follow form over underlying)	\$ 8,500
Workers Compensation/Employers Liability	\$ 21,840
<b>Total Annual Premium</b>	<b>\$ 82,837</b>

Premiums are based upon 1st year projections of 1,200 students, 85 staff members, \$5,300,000 payroll, \$400,000 contents, and a building replacement cost of \$18,500.



**Tentative Timeline for Insurance Coverages**

As part of your planning process, we have prepared a timeline for buying the insurance package before start of the school year. See below for each coverage:

<b><u>Coverage</u></b>	<b><u>Timeline</u></b>
Directors and Officers /Educators Legal Liability	As soon as board is formed and making school based decisions (contracts)
Employment Practices Liability	Before first employee is hired
Workers Compensation	When first employee is hired or board is formed.
General Liability, Excess, Crime, Sexual Abuse, Auto Liability, Student Accident (please ask for this separately if you would like the coverage).	When lease agreement is signed or property is purchased (landlord will require General Liability coverage).
Property/Flood	As soon as you acquire contents/school equipment

Please let me know if you have any questions.

Sincerely,

Martin S. Dezelan  
Area Vice President

## Attachment 18: 5-Year Pro-Forma Budget

See Excel workbook.



## Attachment 19: Budget Narrative

Athlos Academy of Indiana (AAI) will be a fiscally responsible and financially prudent organization. The school prepared a conservative start-up and five-year budget plan that maximizes the school's financial resources, while ensuring that AAI provides a complete educational experience for its students. AAI budget assumes a basic grant allotment of \$6,277 per a student. This was calculated by utilizing the publicly available Indiana Tuition Support Calculator and then adjusting for any expectations or changes in revenues for the schools' initial year of operations (FY 19-20). In addition, the school assumes \$77 per student in textbook reimbursement and receipt of the Charter and Innovation School Grant Program. Across the five-year budget, the school assumes an increase in state funding of 1.5 percent, applied in years four and five. The first three years, AAI assumes a flat amount in state funding.

The school anticipates receipt of federal funding associated with providing USDA meal services, Title Services, and special education services. AAI cash receipts for USDA meal services are equal to the federal reimbursement rate for those students who qualify for such reimbursement, as well as local food services revenues from those students and employees who utilize the food services and do not qualify for such reimbursement. While the school assumes revenues will cover commodity costs, AAI has conservatively budgeted that all food service staff salaries and benefits will be paid by the General Fund. This conservative estimate ensures should enrollment or participation be less than budgeted, or commodity costs come in higher than projected, the school will have resources available to manage through these differences. The school figured Title funding at \$225 per a student, an estimate associated with providing Title Services for the population and number of students the school will be serving. Lastly, AAI plans to provide special education services and assumes a reimbursement rate of 85 cents of every dollar, excluding benefit costs, expended on Special Education.

AAI planned a conservative revenue base so that if funding should be changed, or should funding levels not meet expectations, the school can quickly adjust without negatively impacting services for students.

On the expenditure side of the budget, AAI has designed a staffing plan that will ensure the school is successful in providing services and meeting the needs of students. The school has budgeted to have appropriate administrative staff that will ensure proper oversight for the school's operations and its programs. The school is planning for an average class size of 24, as well as providing adequate amounts of student support with guidance counselors and on-site special education services provided by a student support director, teachers, and teaching assistants.

AAI allocated \$210 per a student for curriculum and textbooks, as well as \$150 for student and administrative technology resources in year one. The school allocated resources for other classroom supplies beyond textbooks and curriculum, as well as materials and services for facility operations. Beyond year one, the school continues to allocate a generous amount of funding for curriculum and technology in years two through five, allowing the school to not only maintain but expand its educational offerings.

The school plans to lease its facilities from Athlos Academies (ESP). The school anticipates an annual lease of approximately \$1.65 million dollars, growing 2 percent annually.

The school has budgeted for insurance costs, as well as maintenance and supplies, custodial staff, and utilities associated with a building of such square footage.

AAI budgeted for a charter administrative fee as well as an ESP fee. The fee charged by the Education Service provider includes an extensive suite of services provided to the school. These services, and the specifics of them, are further outlined in the Master Service Agreement provided in this charter application under Attachment 3. The school anticipates having a healthy fund balance year one, growing that amount to approximately \$80,000 by year five. Should the school not meet its enrollment target or have lower than projected revenues or increased expenses, AAI will adjust its operations accordingly with the focus being on maintaining instructional and student support services. The school will evaluate staffing needs, as well as adjust administrative and overhead operations accordingly to ensure the school is financially successful.

The school has a plan in place for year zero operations and ensuring a successful startup process. Start-up funds will be provided by Athlos Academies (ESP) in the form of a loan, payable back to the school in annual increments over the first five years of operations. The startup funds will be utilized to hire a school leader a full year in advance of the school opening, as well as allocating funds for a registrar, student support director, and food services manager to be hired at different points throughout the year zero operations. AAI also budgeted for legal expenses, other contracted services, as well as startup operational needs including supplies and technology.

AAI took careful considerations when planning the budget to ensure the school will be financially successful.

## Attachment 20: Existing Organizer Financials

Not applicable.

## Attachment 21: Network Portfolio Performance

See Excel Workbook.

## Attachment 22: Litigation Documentation

Not applicable.