



## **The Excel Center - Shelbyville**

Application for Charter Renewal  
October 2020

Presented to the Indiana Charter School Board  
by Goodwill Education Initiatives

Exhibit B

**Renewal 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.

**Charter School Name:** **The Excel Center – Shelbyville**  
117 N Harrison Street

**Charter School Address:** Shelbyville, IN 46176

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**Designated Representative and Contact Information (Phone & Email):** **Betsy Delgado**  
317-524-4380  
[bdelgado@goodwillindy.org](mailto:bdelgado@goodwillindy.org)

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**Mission Statement:**

The mission of The Excel Center is to provide adults the opportunity and support to earn a high school diploma and post-secondary education while developing career paths that offer greater employment and career growth opportunities. Excel Centers “meet students where they are” in their education by providing a flexible structure and supportive relationships to help students manage work, life, and family concerns as they achieve their educational goals.

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**School Leader/Principal:** **Khalilah Palmer**

| <b>Current Board of Directors</b>  |                        |
|------------------------------------|------------------------|
| Jay Oliver, Chair                  | Gita Baker             |
| Doris Pryor, Vice-Chair            | Claudia Cummings       |
| Jill Kramer, Secretary             | Marianne Glick         |
| Kent Kramer, President & Ex-Oficio | C. Perry Griffith, Jr. |
| Daniel J. Riley, Treasurer         | Richard Horn           |
|                                    | Shayla Pulliam         |

| <b>Current Grades Served</b> | <b>Future Enrollment</b> | <b>Grade Span for Next Charter Term</b> | <b>Maximum Enrollment for Next Charter Term</b> |
|------------------------------|--------------------------|-----------------------------------------|-------------------------------------------------|
| 9-12                         | Year 6                   | 9-12                                    | 160                                             |
| 9-12                         | Year 7                   | 9-12                                    | 160                                             |
| 9-12                         | Year 8                   | 9-12                                    | 160                                             |
| 9-12                         | Year 9                   | 9-12                                    | 160                                             |
| 9-12                         | Year 10                  | 9-12                                    | 160                                             |
| 9-12                         | At Capacity              | 9-12                                    | 160                                             |

**Identify ESP or partner organization (if applicable):** Not applicable

# Executive Summary

## Mission and Vision

The mission of The Excel Center is to provide adults the opportunity and support to earn a high school diploma and begin post-secondary education while developing career paths in sectors of the local economy that offer better-than-average employment and growth opportunities. The school will “meet students where they are” in their education by providing a flexible structure and supportive relationships to help them manage work, life, and family concerns as they achieve their educational goals.

The vision of Goodwill Education Initiatives, Inc. (GEI), through The Excel Center, is to deliver on the mission of Goodwill of Central and Southern Indiana, Inc. (GCSI): to change lives every day by empowering people to increase their independence and reach their potential through education, health, and employment. The Excel Center brings about hope and economic opportunity to communities, families, and individuals. Through the power of education, GEI’s goal is to set people on a pathway towards better career prospects that lead to economic self-sufficiency and ultimately break the cycle of poverty.

## History

In 2003, GCSI leadership created GEI, a not-for-profit entity, to operate charter schools. That year, the Mayor of Indianapolis authorized a charter for the Indianapolis Metropolitan High School which opened in fall 2004, thus beginning GCSI and GEI’s experience in operating schools.

In 2008, a myriad of catalysts led GEI leadership to explore opening a school designed specifically for adults. Primarily, the Great Recession led to higher unemployment rates, leaving many individuals finding themselves either unemployed or having difficulty finding jobs that offered family-sustaining wages. Those that were hit hardest by the Recession were often people who never completed high school. Clients already being served by GCSI were struggling to find jobs that did not require at least a high school diploma and employers were also having a difficult time finding employees who met their minimum qualifications. In 2010, to meet the needs of an entire community, GEI opened The Excel Center, a high school designed for adults who previously dropped out of high school and were seeking to re-engage in their education to earn a high school diploma and begin postsecondary education to develop career paths that offer greater employment and career growth opportunities.

Since opening its first Excel Center in 2010, GEI has grown to become the largest charter school operator in the state, operating The Excel Center in 15 locations across central and southern Indiana, as well as Indianapolis Metropolitan High School.

## Community Need

Across the state, there are more than 600,000 Hoosiers over the age of 18 without a high school diploma.<sup>1</sup> Individuals who drop out of high school face a number of challenges that affect their current well-being and future success. High school dropouts have worse health,

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<sup>1</sup> U.S Census Bureau. American Community Survey, estimates released December 2017.

lower incomes, and fewer job opportunities than the general population.<sup>2</sup> In addition, high school dropouts are more likely to be recipients of public assistance and are eight times more likely to be incarcerated than high school graduates.<sup>3</sup> The Excel Center has the ability to offer a significant number of Hoosiers an opportunity to improve their educational attainment.

The impact of dropping out of high school extends beyond the individual without a high school diploma and also has an impact on the economic stability of a local community. According to the Alliance for Excellent Education, an additional 10,000 high school graduates in Indiana would increase the gross state product by \$100 million, add 800 new jobs, and increase state and local tax revenue by \$4.4 million.<sup>4</sup> There is a clear and significant need for high schools that serve adults and enable them to earn a high school diploma.

### **Outcomes**

Since 2010, all Excel Centers operated by GEI have achieved “A” or “B” ratings on the state’s adult high school accountability system in each of the schools’ years of operation. Across The Excel Center network, students enroll with unique sets of challenges and barriers to overcome. Based on our iExcel self-reported student orientation surveys: the majority of students who come to The Excel Center receive at least one form of public assistance, slightly more than 10% of these students are employed full time, and close to half of students have at least one child under the age of 18.

Despite these challenges, The Excel Center has experienced continued and increasing success. Aside from last year and the impact of COVID-19 on schools, over the history of The Excel Center the schools have regularly increased both the number of graduates as well as the number of graduates who have achieved postsecondary success.

As of June 2020, The Excel Centers operated by GEI have produced over 5,500 graduates. In the most recent school year, 82% of all graduates earned either dual credit or an industry-recognized credential, with many students earning both. (see Chart 1 and Chart 2)

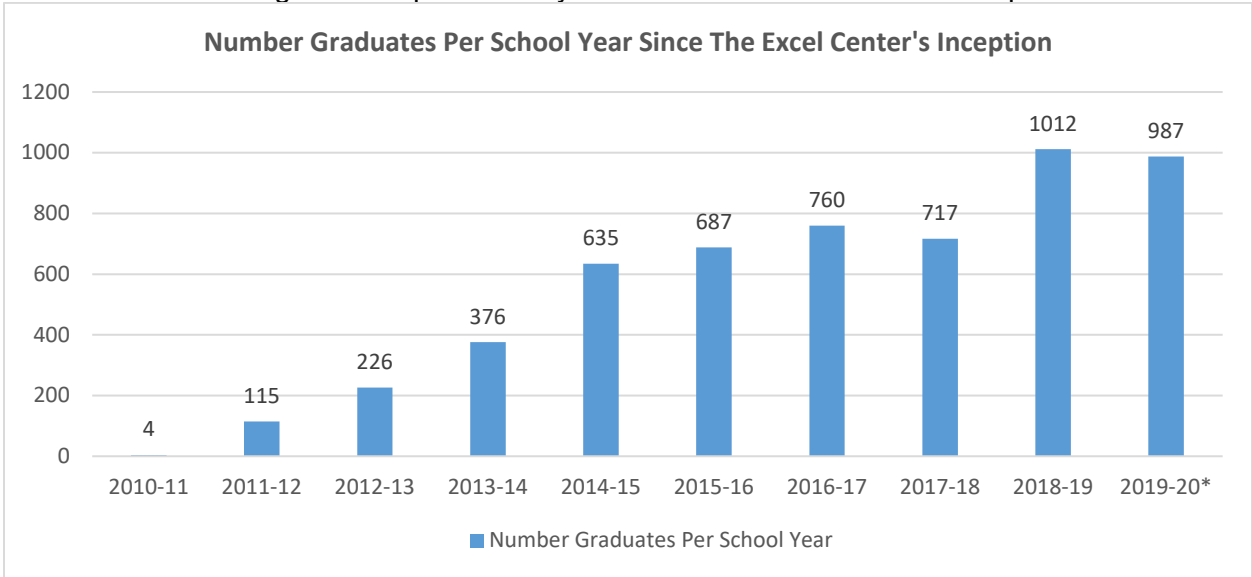
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<sup>2</sup> Gouskova, E. & Stafford, F. (2005). Trends in household wealth dynamics, 2001-2003. Ann Arbor: Institute for Social Research, University of Michigan. Retrieved from [http://psidonline.isr.umich.edu/Publications/Papers/tsp/2005-03\\_Trends\\_in\\_household\\_01\\_03\\_July\\_05.pdf](http://psidonline.isr.umich.edu/Publications/Papers/tsp/2005-03_Trends_in_household_01_03_July_05.pdf)

<sup>3</sup> Bridgeland, J.M., Dilulio, J.J., & Morison, K.B. (2006). *The silent epidemic: perspectives of high school dropouts*. Washington, DC: Civic Enterprises. Retrieved from <http://www.gatesfoundation.org/nr/downloads/ed/TheSilentEpidemic3-06FINAL.pdf>

<sup>4</sup> Alliance for Excellent Education (2013). *The economic benefits of increasing the high school graduation rate for public school students in Indiana*. Retrieved from [http://impact.all4ed.org/wp-content/uploads/2015/09/IN\\_2015.pdf](http://impact.all4ed.org/wp-content/uploads/2015/09/IN_2015.pdf)

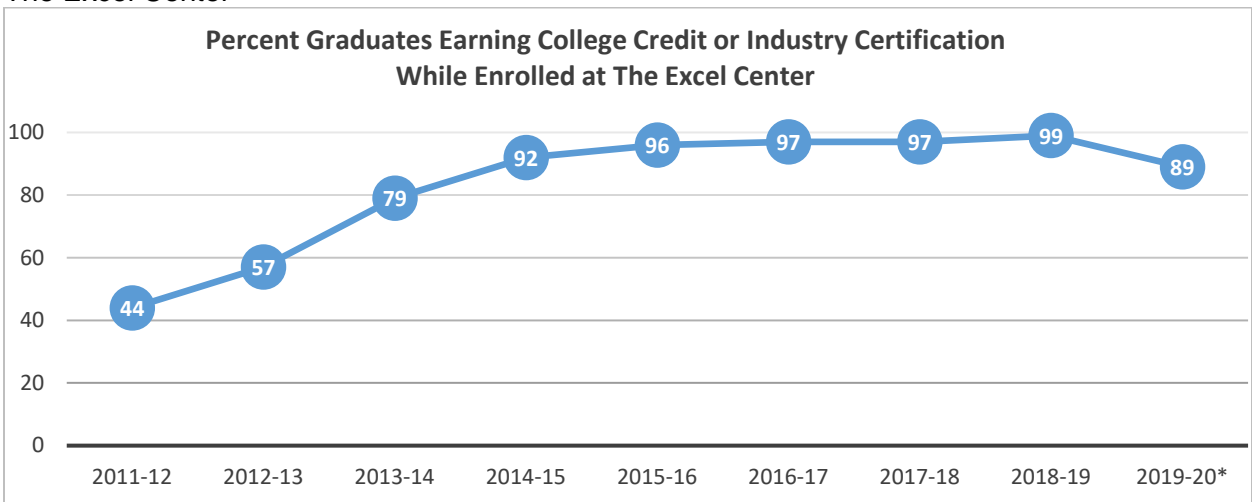
**Chart 1.** Number of graduates per school year since The Excel Center's inception



*\*Note: SY2019-20 was severely disrupted by COVID -19, requiring all educational opportunities to suddenly shift to virtual instruction in March 2020 and remain that way for the remainder of the school year.*

The Excel Center has not only continued to increase the number of graduates consistently, it has done so without reducing the quality of graduates, as supported by the percentage of Excel Center graduates leaving school with a dual credit, industry-recognized credential, or both.

**Chart 2.** Percent graduates earning college credit or industry certification while enrolled at The Excel Center



*\*Note: SY2019-20 was severely disrupted by COVID -19, requiring all educational opportunities to suddenly shift to virtual instruction. Students' ability to earn certifications was impacted when most certification providers were not able to offer certification assessments in a virtual format.*

A third-party review of The Excel Center's impact has demonstrated that students' employment levels and earnings increase significantly as a result of attending the school. Graduating from The Excel Center confers a wage and re-employment effect premium of \$9,828 per graduate. In addition, a graduate from The Excel Center utilizes significantly less money per year in public spending among public assistance programs, leading to an annual savings of \$793.60 per year per student and a total of \$1,898,291 in annual savings yielded by all graduates of The Excel Center in Indiana.<sup>5</sup>

### **The Excel Center – Shelbyville**

Through this charter renewal application, GEI is seeking the full renewal of The Excel Center - Shelbyville's charter. Like all other Excel Centers operated by GEI, The Excel Center – Shelbyville has a strong history of high quality academic, organizational, and financial performance. The Excel Center – Shelbyville proudly serves its community as a small-school model of The Excel Center, serving close to 150 students. This small school model is a right-size fit for the community the school serves, and student outcomes are reflective of the quality of staff and educational opportunities provided.

The Excel Center - Shelbyville is a valued asset to the community it serves. It has a history of strong performance, having earned an "A" rating on the state's adult high school accountability system in each year of the school's operation. The Excel Center – Shelbyville has proudly received "Meets Standard" or "Exceeds Standard" in the majority of appraised categories of the Indiana Charter School Board's accountability framework. Since opening in the 2016-17 school year, The Excel Center – Shelbyville has graduated 133 students. During the most recent school year, even with a pandemic and many certification providers unable to assess students due to the need to remain virtual, 82% of The Excel Center - Shelbyville graduates were still able to earn either dual credit or an industry-recognized credential.

The results since opening the first Excel Center suggest that Excel Centers are positively impacting the state, the local communities where the schools are located, and the individual lives and families of the students served. The full charter renewal of The Excel Center – Shelbyville will continue to uplift students, their families, and the community.

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<sup>5</sup> Center for Evaluation & Education Policy (March 2017). "The Excel Center Research Report". Indiana University. Bloomington, Indiana.

**Section I: Performance Review**

**Successes**

The Excel Center – Shelbyville has marked a number of successes since first opening its doors for the 2016-17 school year. For each of the school’s four years of operation, The Excel Center – Shelbyville has earned an “A” based on Indiana’s adult high school accountability model. The school has increased its number of graduates each year, and the school takes pride in the quality of graduates it produces. In addition to increasing the annual number of graduates since its inaugural year, The Excel Center – Shelbyville has also demonstrated an outstanding adult high school graduation rate, achieving a 73% in the first year of operation (SY 2016-17), and finishing the 2019-20 school year with an adult high school graduation rate of 112%. (Table 1)

The Excel Center – Shelbyville’s College and Career Readiness (CCR) rate has been a strong indicator of graduate quality throughout the school’s history, demonstrating a 93% CCR rate in the school’s first year and continuing to improve during the next two years. While the 2019-20 CCR rate is still strong at 82%, this outcome is more a reflection on the impact of COVID-19 than the school’s performance. When schools were required to shift to full virtual instruction in early 2020, this also affected the certification assessment providers, as many of them struggled to pivot to offering the practicum portion of these exams virtually. As a result, the school’s CCR rate was impacted not because of student performance but rather due to the inability of providers to offer the certification exams in a safe, virtual setting. (Table 1)

**Table 1**

| <b>The Excel Center – SHELBYVILLE</b>                             |                |                |                |                |
|-------------------------------------------------------------------|----------------|----------------|----------------|----------------|
| <b>Graduates, Adult High School Graduation Rate, and CCR Rate</b> |                |                |                |                |
|                                                                   | <b>2016-17</b> | <b>2017-18</b> | <b>2018-19</b> | <b>2019-20</b> |
| <b>Number Graduates per Year</b>                                  | 15             | 35             | 38             | 45             |
| <b>Adult High School Graduation Rate</b>                          | 73%            | 113%           | 99%            | 112%           |
| <b>CCR Rate</b>                                                   | 93%            | 94%            | 100%           | 82%*           |

*\*Note: SY2019-20 was severely disrupted by COVID-19, requiring all educational opportunities to suddenly shift to virtual instruction. Students’ ability to earn certifications was impacted when most certification providers were not able to offer certification assessments in a virtual format.*

In addition to the school’s academic success, The Excel Center - Shelbyville has cultivated a number of successful community partnerships that should be recognized and celebrated as part of this charter renewal.

- The Excel Center - Shelbyville is proud to have a strong relationship with Shelbyville’s mayor, who is an engaged member of the school’s Community Advisory Team (CAT) and has also served as a speaker at graduation ceremonies. The mayor’s ongoing involvement with the school has been a valued partnership.
- Local hospital system Major Health collaborates with The Excel Center - Shelbyville in an initiative that offers students the opportunity to take certification classes to become a Certified Clinical Medical Assistant (CCMA), and a path to employment and competitive wages after successfully completing the certification and graduation.
- Discovery Preschool serves children ages 3-5 and enrolls students from The Excel

Center - Shelbyville's drop-in childcare when the children turn three, providing an opportunity for the children to attend preschool prior to transitioning to kindergarten.

- The Excel Center - Shelbyville provides a food initiative for its students struggling with food insecurity that is supported by local community generosity.
- The Excel Center – Shelbyville has developed a relationship with the local high school so that students who will not graduate on time know there is another option for them to complete their high school diploma if continuing at their local high school is not a best fit for the student.

### **Performance Dashboard Summary Measures Not Meeting or Exceeding Standard**

Based on the Indiana Charter School Board (ICSB) Accountability System, The Excel Center – Shelbyville has one area identified as “Does Not Meet Standard” on the Academic Success page. This metric is:

- 1.2.a. Students graduate from high school in four years (as defined by the state's four-year graduation rate).

The metric of graduating from high school in four years puts The Excel Center in a unique position, in that the student population at an Excel Center is comprised predominantly of adults whose high school cohorts have already exited school. As a result, adult high schools are exempt from a number of accountability measures designed for schools serving traditional-aged students as outlined in the Indiana State Board of Education (SBOE) Adult Accountability Rule (511 IAC 6.3). This rule was approved by the SBOE in October 2015 and went into effect January 2016.

When students enroll at an Excel Center and their graduation cohort has already left high school, they are assigned to a grade level at the school. Even so, students enrolling in The Excel Center come to us in various states of credit completion and academic levels. Some students enter The Excel Center with significant credits and are very close to graduation, while others enroll with a longer path to graduation ahead of them. For students with a longer journey to graduation, a number of them enroll with minimal high school credits on their transcripts, while others have earned multiple credits in electives but need to earn the majority of core content credits before being able to graduate. In all of these situations, the goal of The Excel Center is to support these students in demonstrating mastery of the skills and content necessary to earn the credits. The Excel Center prides itself on doing this in an educationally rigorous manner.

While The Excel Center, as an adult high school, is not accountable to the metric of 4-year graduation cohort in the same way as high schools for traditional-age students, The Excel Center is accountable to the adult high school graduation rate. By reviewing this metric as a reflection of the school's graduation outcomes, it is clear that The Excel Center – Shelbyville has performed well in this area all four years of operation. For its first year of performance, the adult high school graduation rate for the school was 73%, and each year since the school has maintained a rate hovering near or above 100%. (Table 2)



**Table 2**

| <b>The Excel Center – SHELBYVILLE</b>    |                |                |                |                |
|------------------------------------------|----------------|----------------|----------------|----------------|
| <b>4-Year Graduation Rate Trends</b>     |                |                |                |                |
|                                          | <b>2015-16</b> | <b>2016-17</b> | <b>2017-18</b> | <b>2018-19</b> |
| <b>4-Year Cohort Graduation Rate</b>     | 18%            | 28%            | 25%            | 28%            |
| <b>Adult High School Graduation Rate</b> | 73%            | 113%           | 99%            | 112%           |

Additionally, The Excel Center – Shelbyville received a rating of “Does Not Meet Standard” for two standards under Financial Health:

- Standard 7: Cash Flow & 3-Year Cumulative Cash Flow (for The Excel Center LLC)
- Standard 8: Debt Service Coverage Ratio (for The Excel Center LLC)

Within The Excel Center model, the typical Excel Center serves approximately 300 students. This size school works well in large metropolitan areas or in slightly smaller communities where there is an exceptional number of individuals needing a high school diploma. In other communities, while The Excel Center is still needed, we have learned that a smaller school model is a better fit for the community.

When The Excel Center – Shelbyville first opened in the 2016-17 school year, the original charter application called for a 300-student school. GEI’s experience in opening Excel Centers has taught us that it generally takes a few years for a new school to establish itself in the community and reach its enrollment capacity. The Excel Center – Shelbyville was no different in this regard, and by year two of operation we realized the 300-seat model was not the appropriate size for the community. As a result, GEI submitted a charter amendment for the school in the third year of operation to right-size the charter to an enrollment of 140 students.

In the school’s first years of operation, it can be noted that a number of financial metrics received “did not meet standard” which was reflective of two key challenges the school faced. The first challenge was that the school’s permanent space was not ready in time for opening and consequently the school needed to lease temporary space. This caused the school to incur additional costs, which resulted in net assets being especially low for the first few years. Additionally, when The Excel Center – Shelbyville opened, Indiana did not have the Charter School Program (CSP) Grant, which meant that costs that could have been covered by the CSP grant had to be absorbed into the overall budget for the school, causing a tighter budget overall.

In The Excel Center’s small school model, a large percentage of expenses are wrapped up in wages and benefits; therefore, it takes longer to remediate any financial issues. That being said, the cash flow in the current financial metrics demonstrates that GEI has been fiscally responsible and kept costs contained even as The Excel Center – Shelbyville’s enrollment has grown since year one. As a result, we anticipate remaining in the “meets standard” category for these metrics as the school continues to operate.

As can be seen with the positive changes over time in these financial standards, the right-sizing of the school coupled with the length of operation in its adjusted small school model is addressing the issue. GEI anticipates all metrics to be positive within the course of approximately a year, and the issues to be completely resolved prior to the next charter renewal cycle.

Specific to Standard 8, Debt Service Coverage Ratio (for The Excel Center LLC), per our calculations The Excel Center LLC did meet standard for all five years under review (Table 3). During that time The Excel Center LLC had no external debt aside from operating lease obligations.

**Table 3.** Debt Service Coverage Ratio – Excel Centers, LLC

**Debt Service Coverage Ratio - Excel Centers, LLC**

AS CALCULATED BY ICSB

|                            | <u>2015</u>      | <u>2016</u>      | <u>2017</u>      | <u>2018</u>      | <u>2019</u>      |
|----------------------------|------------------|------------------|------------------|------------------|------------------|
| Change in Net Assets +     | 1,189,277        | 1,163,011        | 2,036,428        | 1,321,833        | 1,228,513        |
| Depreciation Expense +     | 1,416,489        | 1,410,573        | 1,160,284        | 1,335,294        | 1,131,336        |
| Interest Expense           | 27,196           | 20,610           | 6,227            | -                | -                |
|                            | <u>2,632,962</u> | <u>2,594,194</u> | <u>3,202,939</u> | <u>2,657,127</u> | <u>2,359,849</u> |
| Divided by                 |                  |                  |                  |                  |                  |
| Annual Principal Payment + | 463,621          | 310,310          | -                | -                | -                |
| Interest +                 | 27,196           | 20,610           | 6,227            | -                | -                |
| Lease Payments             | <u>2,177,418</u> | <u>2,625,142</u> | <u>2,682,997</u> | <u>2,753,484</u> | <u>3,184,766</u> |
|                            | <u>2,668,235</u> | <u>2,956,062</u> | <u>2,689,224</u> | <u>2,753,484</u> | <u>3,184,766</u> |
| Ratio                      | 0.99             | 0.88             | 1.19             | 0.97             | 0.74             |

AS RECOMMENDED BY GEI

|                            | <u>2015</u>      | <u>2016</u>      | <u>2017</u>      | <u>2018</u>      | <u>2019</u>      |
|----------------------------|------------------|------------------|------------------|------------------|------------------|
| Change in Net Assets +     | 1,189,277        | 1,163,011        | 2,036,428        | 1,321,833        | 1,228,513        |
| Depreciation Expense +     | 1,416,489        | 1,410,573        | 1,160,284        | 1,335,294        | 1,131,336        |
| Interest Expense           | 27,196           | 20,610           | 6,227            | -                | -                |
|                            | <u>2,632,962</u> | <u>2,594,194</u> | <u>3,202,939</u> | <u>2,657,127</u> | <u>2,359,849</u> |
| Divided by                 |                  |                  |                  |                  |                  |
| Annual Principal Payment + | 463,621          | 310,310          | -                | -                | -                |
| Interest +                 | 27,196           | 20,610           | 6,227            | -                | -                |
| Lease Payments             | <u>1,184,718</u> | <u>1,600,511</u> | <u>1,685,042</u> | <u>1,596,642</u> | <u>1,903,219</u> |
|                            | <u>1,675,535</u> | <u>1,931,431</u> | <u>1,691,269</u> | <u>1,596,642</u> | <u>1,903,219</u> |
| Ratio                      | 1.57             | 1.34             | 1.89             | 1.66             | 1.24             |

Note: The amount used by ICSB for lease payments includes all occupancy - utilities, janitorial, repair and maintenance, and property taxes

|                 |                  |                  |                  |                  |                  |
|-----------------|------------------|------------------|------------------|------------------|------------------|
| Rent            | 1,184,718        | 1,600,511        | 1,685,042        | 1,596,642        | 1,903,219        |
| Other Occupancy | 992,700          | 1,024,631        | 997,955          | 1,156,842        | 1,281,547        |
|                 | <u>2,177,418</u> | <u>2,625,142</u> | <u>2,682,997</u> | <u>2,753,484</u> | <u>3,184,766</u> |

## **Section II: Improvement**

### **(1) Sustain and build academic, organizational, and operational success over the next term.**

- (a) Governing board**
- (b) Leadership team**
- (c) Teaching staff**
- (d) Academic achievement**

Since its inception, GEI has focused on sustaining success and striving towards continuous improvement in all facets of its operations. GEI has developed numerous plans and processes to sustain the success of The Excel Center and has a proven track record of sustaining the success of multiple schools. Since opening its first Excel Center in 2010, GEI has grown to become the largest charter school operator in the state, operating Excel Centers in 15 locations across Indiana as well as Indianapolis Metropolitan High School.

GEI has long demonstrated its ability and capacity to achieve long-term success for each of its schools. This section of The Excel Center – Shelbyville charter renewal application articulates GEI’s plans and strategies for sustaining and continuing to build academic, organizational, and operational success over The Excel Center – Shelbyville’s next charter term in a number of key areas.

#### **(a) Governing Board**

The GEI Board of Directors acts as the ultimate governing authority of all 15 Excel Centers operated by GEI, including The Excel Center - Shelbyville. The GEI Board of Directors has operated for over sixteen years and has a long history of operating effectively and in a manner that supports schools with a high degree of success. The Board has long been a model of school governance for other charter schools both locally and outside of Indiana. Over The Excel Center – Shelbyville’s next charter term, the Board of Directors plans to maintain its high standard of operation and performance.

GEI’s Board of Directors brings together a considerable array of business experience in industry, public policy, education, finance, and workforce development. Members of the Board of Directors have extensive organizational leadership experience managing for-profit and not-for-profit businesses as well as knowledge of the local community and education landscape.

Board members choose to serve on the GEI Board of Directors for a number of reasons, including a desire to improve the educational systems available to children and adults, a belief in the performance and mission of GEI, helping individuals reach their maximum potential, and hoping to see more individuals earn the basic credential most needed for a successful, productive life – a high school diploma.

The Board concerns itself more with long-term rather than short-term matters, matters of policy rather than operational concerns, and matters of paramount rather than ordinary importance. The Board’s specific responsibilities include:

- Monitoring the school’s key performance indicators;
- Establishing policy;

- Approving long-term plans;
- Approving annual plans and budgets;
- Approving any actions that would create or have the potential to create significant obligations for the schools;
- Ensuring financial solvency;
- Assessing its own performance; and
- Taking other actions as necessary and ensuring that structures and mechanisms are in place to ensure that GEI is in compliance with all applicable laws, regulations, and contracts, including requirements of the schools' charters.

In addition, the GEI Board of Directors is responsible for periodically (no less than annually) reviewing and evaluating its own performance as well as the relationship between GEI and GCSI. The Board's evaluative nature is directly related to its commitment of continuous improvement and to ensure that all services provided to the schools are meeting quality expectations, providing good value for the school, are enhancing GEI's objective of being a good steward of its state and federal resources, and enabling students to achieve their maximum potential.

Although the Board assumes sole governing authority over The Excel Center, each Excel Center has a Community Advisory Team (CAT). The purpose of the CAT is three-fold: to strengthen partnerships between the local Excel Center and its community members, focus on enrollment and student retention rates, and foster student opportunities such as internships, job training, and pathways to employment. The CAT is responsible for providing input to the local Excel Center on factors that could affect the performance and/or long-term success of each Excel Center location, including major economic changes, changes in the political environment, and any major news. Moreover, the Community Advisory Team provides a community voice to the schools.

The goal is to have Community Advisory Teams meet on a quarterly basis in advance of GEI's Board of Directors meetings, but no fewer than twice annually. The School Director is responsible for managing the relationship between the school and the advisory group and setting the agenda for each meeting. As needed, agendas are developed in collaboration with the Board of Directors or GEI leadership.

### **(b) Leadership Team**

A strong leadership team, including high quality school leaders, is essential to maintaining the success of The Excel Center – Shelbyville. In addition to having a high-quality leadership team with individual strengths, a high level of collegiality and collaboration amongst the leadership team undoubtedly contributes to the success of The Excel Center – Shelbyville. The leadership team at The Excel Center – Shelbyville is comprised of:

- School Director: Khalilah Palmer (also serves as Lead Teacher for the school)
- Manager of Office Administration and English Language Learner Coordinator: Hope Fenton
- College & Career Readiness Specialist/Lead Instructional Coach: Susan Sheets
- Teacher of Record: Maria Ousseron-Brown

The school-based leadership team at The Excel Center – Shelbyville is also supported by the extended leadership team of GEI, which includes the Vice President of Mission & Education, the Senior Director of Education Initiatives, the Excel Center Regional Director, and other

members of the GEI team.

The school-based leadership team meets on a routine basis to discuss leading and lagging indicators of school performance and to collaborate and communicate frequently for collective problem solving as issues arise. At least three times a year Excel Centers participate in a network-wide data review to identify best practices and challenges within performance, and capitalize on the expertise of the extended network to problem solve. This allows The Excel Centers to develop initiatives to continuously improve the school model for the benefit of improving student outcomes.

GEI understands that developing and maintaining effective schools means developing and maintaining strong leaders, and as such, GEI has established various training and professional development models to support The Excel Center network and the staff that brings the model to life. In addition to developing and executing staff trainings, it's critical to periodically evaluate the effectiveness of professional development and restructure offerings as needed to ensure they continue to drive the intended outcomes. During the 2016-17 school year, GEI completed a comprehensive review of its various school leadership development offerings. An audit of these programs was conducted to ensure leadership development trainings moved beyond solely focusing on straightforward skill development, and broadened the focus to the development of leadership capacity as well. This review of leadership development initiatives resulted in a revision in content for the Technical Leadership Series, a development opportunity offered to new and aspiring Excel Center directors. As a result of the revisions, the training series is now more aptly named the Leadership Series in order to reflect the intentional focus on leadership development. Additionally, GEI's other key leadership development series has now been separated into two distinct tracks. This division will allow the development activities to best align with the specific needs of the participants as it relates to the various roles within GEI. The process of revising these professional development tracks has been a collaborative effort of GEI leadership, GCSI Human Resources, and The Excel Center directors. In addition to these leadership development opportunities, The Excel Center directors participate in monthly Directors' Meetings. These meetings provide ongoing training, development, and information as a means of educating and strengthening the knowledge base of Excel Center directors.

Similar meetings take place on a monthly basis for Excel Center leadership team members. This includes monthly professional development for Lead Teachers, Lead Coaches, Special Education Teachers of Record, and English Language Learner Coordinators. These ongoing sessions allow for training and networking, as well as provide a 'train the trainer' model in which these staff members then return to their schools and share the information learned with their site-level team members. This structure reinforces GEI's continuous improvement culture, strengthens individual staff members' skills and the team as a whole.

### **(c) Teaching staff**

At The Excel Center, the teaching staff is supported by Lead Teachers, who serve as professional instructional coaches. Lead Teachers play an active role in the development of the teachers' craft by providing feedback and guidance. Additionally, Lead Teachers participate in The Excel Center network-wide monthly Lead Teacher meetings. At these meetings, Lead Teachers share strategies and techniques for supporting teachers, as well as share best practice for what works in their own Excel Center to elicit the best educational outcomes from students.

Lead Teachers also receive support from GEI's Lead Teacher Liaison and the Senior Director of Education Initiatives, both of whom can work with schools on specific initiatives and areas a school may wish to target. One of the most recent large-scale projects embarked upon was the transition to Indiana's Graduation Pathways. Because The Excel Center model focuses on "what comes next" for students, the Graduation Pathways is a natural fit. In order to make sure Excel Center staff members fully understood Indiana's shift in graduation requirements and what that looked like for The Excel Center, Excel Center leadership and teachers worked together closely to review all Excel Center requirements and create a crosswalk to the Graduation Pathways. Course content was reviewed, including all related projects and assessments, to ensure The Excel Center was adequately aligning to Indiana's new graduation requirements.

#### **(d) Academic achievement**

The Excel Center has identified three main pillars that are critical to sustaining a high level of student academic achievement: (1) an academic philosophy that meets the goals and needs of adult students, (2) a concentrated focus on College and Career Readiness, and (3) a coaching platform designed to address the barriers that may impede a student's continued educational success.

The academic philosophy for students who have dropped out of high school leads to flexibility in the design of the school's academic program. Students enroll at The Excel Center at various skill levels and have a varying number of credits to achieve. Many students will be working to balance their education with life commitments, including work and family obligations.

Therefore, The Excel Center uses a "one student at a time" method where each student establishes his or her educational goals and moves at his or her own pace to achieve learning goals. Every student at The Excel Center has a unique education plan and school staff work with each student to craft an educational program that fits his or her specific needs.

The environment within The Excel Center is designed to meet adults' learning needs by encouraging them to see the relevance and importance of their education while providing a mature environment for learning and discussion. The school is designed to reflect the characteristics and educational environments that benefit adult learners. Complete College America's 2011 report<sup>6</sup> "Time is the Enemy" highlights how, for many adults in college, an extended period of time to progress through school is a major detriment to their lasting success. Although the report's findings focus on postsecondary education, its lessons about adult learners have been incorporated into the design of The Excel Center. For students who are balancing commute times, family obligations, work, and school, lengthy educational programs with few rewards are a major barrier to ongoing success. The following elements of Complete College America's recommendations have been incorporated into the academic design of The Excel Center:

- *Use of block schedules with fixed and predictable classroom meeting times.*

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<sup>6</sup> Complete College America (2011). *Time is the Enemy: The surprising truth about why today's college students aren't graduating. . .and what needs to change.* Washington DC: Complete College America. Retrieved from [http://www.completecollege.org/docs/Time\\_Is\\_The\\_Enemy.pdf](http://www.completecollege.org/docs/Time_Is_The_Enemy.pdf)

Excel Center classes operate for 90 or 180 minutes each day.

- *Allow students to proceed at a faster pace, with shorter academic terms, less time of between terms, and year-round scheduling.* The Excel Center's year-round calendar takes minimal breaks and operates on five terms lasting 8 weeks each.
- *Simplify the registration process.* Students enroll in one coherent program during iExcel (student orientation) and receive substantial help from life coaches, teachers, and other staff to understand their path to earn a high school diploma and an industry-recognized credential and/or college credits.
- *Form peer support and learning networks.* Students build relationships with other students and teachers in The Excel Center's small school environment. Additionally, life coaches work to ensure students remain engaged in the school's academic program and feel connected to, and that they belong, in the school.
- *Embed remediation into the regular educational design so that students don't waste time before they start earning credits.* The Excel Center has established a learning environment that meets adults where they are academically. Students participate in fixed-time classes where they cover key academic subjects in language arts, mathematics, social studies, and science. These courses are designed to build skills, teach material, and engage with students. Many students come to The Excel Center requiring significant remediation and special supports. For these students, reading, math, and basic skills labs allow them to learn critical information when they need it. Foundational courses allow students to earn elective credit, helping students connect their remedial work to the goal of earning credits toward their high school diplomas.

The Excel Center's focus on College and Career Readiness prepares students to learn the general skills necessary to become successful in the 21<sup>st</sup> century workplace. The Partnership for 21<sup>st</sup> Century Learning developed a framework that identified many of the critical competencies and skills essential to students preparing to enter the workforce in the 21<sup>st</sup> century.<sup>7</sup> These skills are grouped into four general categories:

- (1) A strong mastery of key subjects and 21st century themes;
- (2) Life and career skills;
- (3) Learning and innovation skills; and
- (4) Information, media, and technology skills.

Building upon Indiana Academic Standards, The Excel Center emphasizes these skills so that students are prepared for the modern workforce. Students will build on themes and case studies applied in workplace contexts, encouraging students to develop and demonstrate skills that will be valuable in workplace environments. Opportunities for students to demonstrate these skills are woven into core content and school progress. The school's emphasis on these skills enables each student to understand how mastery of the core curriculum can be used as a means to develop skills that will be important in their careers.

Many individuals who have dropped out of school will re-enter the educational system when they find that there are few employment opportunities available for individuals who lack a high school diploma. To respond to this demand, The Excel Center's coursework and learning environment enable students to access greater career opportunities. Intrinsic to The Excel Center school model is the graduation requirement of students participating in at least one dual credit or industry certification course. As our students are adults and often focused on

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<sup>7</sup> Partnership for 21<sup>st</sup> Century Learning. Framework for 21<sup>st</sup> Century Learning. Retrieved from <http://www.battleforkids.org/networks/p21/frameworks-resources>

“what comes next” after their diploma, this has always been a key element of The Excel Center model and something Excel Centers have implemented long before Indiana’s transition to the Graduation Pathways. This requirement encourages the pursuit of a post-secondary education for greater career opportunities. The vast majority of these offerings are provided in cooperation with Ivy Tech. The additional Excel Center graduation requirement of post-secondary coursework not only gives students a taste of college and confidence in their ability to complete college-level work, but often provides a transferable credential in a high demand career field, increasing a student’s employment opportunities. Through dual credit classes, students can begin their post-secondary career with earned credits toward their degree.

The Excel Center's academic environment is designed to prepare students for post-secondary education, which requires self-direction, initiative, and personal discipline. The Excel Center promotes students’ awareness and access to valuable careers by introducing students to the benefits, details, and possibilities of a number of careers, and helping to outline the path a student may take to enter a career in a given field. The Excel Center spends significant time introducing students to industries and fields where there are good prospects of finding stable employment and finding a career in an industry with growth potential. The school will provide a variety of academic opportunities for growth that fit students’ needs and learning styles. In order to allow students the freedom to explore these goals, students will determine the pace and, to some degree, content (depending on their career interests) of their academic program.

The Excel Center’s coaching platform addresses the life barriers and issues that may prevent students from meeting their goals and achieving academic success. The Excel Center’s life coaches are responsible for keeping students engaged and motivated in the school. The relationship that coaches create with each student is a critical factor in student success as that relationship provides security, confidence, and encouragement for students to continue when the school work becomes difficult and life barriers become challenging to manage. Life coaches work with students to identify potential barriers to students’ continued education, whether short-term (such as housing and childcare) or long-term (including self-confidence or emotional issues). The coach is responsible for student advocacy, barrier removal, community partnerships, and academic counseling.



**(2) Identify any particular weaknesses, challenges, areas for improvement, and detail school's plan for addressing these needs.**

The Excel Center school model is innovative in that it is a first-of-its-kind adult high school, which creates an opportunity for those who previously dropped out of high school to re-engage in their education and earn a full, state-recognized high school diploma. The Excel Center was the first adult high school in Indiana and the first-of-its-kind in the nation. Furthermore, The Excel Center's approach to education is innovative in that it provides wraparound services to students to allow them to overcome both academic and non-academic barriers to their educational success and future educational and career attainment. One of the areas where these wraparound services can support students significantly is in the area of student attendance.

Although attendance is no longer on the ICSB's dashboard for adult high schools as it was previously, attendance for students at The Excel Center – Shelbyville is still a challenge and an area of priority. The Excel Center - Shelbyville understands that students who previously left high school before graduating often did so because some type of barrier was interfering with the student's ability to complete their education. We also understand that when these students return to high school as adults, the same barriers (and potentially new barriers) may impede a student's ability to attend regularly. These barriers may include the need to work to support themselves and their family, caring for a child or relative, taking care of a health-related issue, or other similar obligations. As a result, The Excel Center supports its students with Life Coaches. Each student at The Excel Center - Shelbyville is assigned a Coach, who works closely with the student. The Coach will work with a student to create and monitor the student's individual graduation plan, reach out to the student when attendance is a problem, and support the student in removing or addressing any barriers that may be interfering with the student's ability to attend regularly. While adult students may still need to miss class more frequently compared to traditionally-aged high school students in order to address their responsibilities outside of the classroom, additional tutoring sessions and opportunities for weekly support offered at The Excel Center – Shelbyville can help a student maintain their academic work and continue to make progress towards graduation.

An additional area of challenge for The Excel Center – Shelbyville has been in the area of certification offerings. As The Excel Center – Shelbyville is a small-school model of The Excel Center and located in a smaller community, finding multiple certification opportunities can pose challenging. As a result, the school has forged a relatively new relationship over the last year and a half with Blue River Career Center, which is an Area Career & Technical Education School Corporation (Inter-Local). Blue River serves students from the four school corporations in Shelby County and helps prepare students for current and emerging careers. Through this partnership, students at The Excel center – Shelbyville will have the opportunity to earn certifications for Certified Nursing Assistant (CNA) and Child Development Associate (CDA), in addition to The Excel Center – Shelbyville's other certification offerings.

**(3) Any additional evidence, beyond data in dashboard, that supports school's case for renewal.**

All evidence and explanation has been provided throughout the other sections of this renewal application.

### **Section III: Proposed Changes to Charter Agreement**

No proposed changes to the charter agreement are requested at this time.

**Instructions for Renewal Budget Workbook**

= Information should be entered into light grey shaded cells.

**Name of Proposed Charter School:** The Excel Center - Shelbyville  
**Location:** Shelbyville Central Schools  
**First Year of New Charter (Renewal Year):** 2021 - 22 SY

**REQUIRED**  
**REQUIRED (Use Pull Down List)**

|                                          |                                                                                                                                                                                                                                                                                                                                                                              |
|------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <a href="#">1. Instructions</a>          | <ul style="list-style-type: none"> <li>All organizers submitting a renewal application to the Indiana Charter School Board must complete Sheets 1 through 4 of the 5-Year Budget Template. All data should be entered into GREY cells.</li> </ul>                                                                                                                            |
| <a href="#">2. Enrollment Projection</a> | <ul style="list-style-type: none"> <li>Please complete the enrollment table for the school's current year, and provide enrollment projections for the next five (5) years beginning with the Renewal Year.</li> </ul>                                                                                                                                                        |
| <a href="#">3. Staffing Plan</a>         | <ul style="list-style-type: none"> <li>Please provide a list of administrative, instructional, and other staff along with estimates of proposed salaries and benefits for both the current year and the next five (5) years. Please include both full and part-time employees and contractors. Projected salary and benefits should align with the 5-Year budget.</li> </ul> |
| <a href="#">4. 5-Year Budget</a>         | <ul style="list-style-type: none"> <li>Please provide the most recent version of the current years budget (as approved by the school's governing board) as well as budget projections for the next 5 years. Tab 5 will show "ERROR" if the information provided in Tab 3 does not align with the personnel expenses provided in Tab 5.</li> </ul>                            |

## 5-Year School Enrollment Projections

(must align with Renewal Application Enrollment Plan)

**School Name:** The Excel Center - Shelbyville  
**Location:** Shelbyville Central Schools  
**Renewal Year:** 2021 - 22 SY

### Notice Related to the Effect of the COVID-19 Pandemic

The "Total Distribution" calculation is an estimate based on the current 2019-21 State budget. Actual tuition support for Year 6 and beyond will not be known until the 2022-24 budget bill is enacted during the 2021 legislative session. The State of Indiana had a significant shortfall in revenue in FY 2020 and expects an even more significant shortfall in FY 2021 due to the COVID-19 pandemic. As a result, there is a possibility that tuition support for 2021-22 (Year 6) and beyond may be lower than it was in 2020-21, and could remain static or low for some years. The "Adjusted Distribution" calculation is a new calculation that attempts to account for this possibility by reducing the total distribution for Year 6 by 5%, Years 7 & 8 by 3%, and Years 9 & 10 by 1%. No reduction is applied to the Current Year calculation. **We strongly suggest that schools remain conservative in all budget projections for the next few years.**

| Enrollment                     | Current Year    | Year 6          | Year 7          | Year 8          | Year 9          | Year 10         |
|--------------------------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|
|                                | 2020 - 21 SY    | 2021 - 22 SY    | 2022 - 23 SY    | 2023 - 24 SY    | 2024 - 25 SY    | 2025 - 26 SY    |
| Kindergarten                   |                 |                 |                 |                 |                 |                 |
| Grade 1                        |                 |                 |                 |                 |                 |                 |
| Grade 2                        |                 |                 |                 |                 |                 |                 |
| Grade 3                        |                 |                 |                 |                 |                 |                 |
| Grade 4                        |                 |                 |                 |                 |                 |                 |
| Grade 5                        |                 |                 |                 |                 |                 |                 |
| Grade 6                        |                 |                 |                 |                 |                 |                 |
| Grade 7                        |                 |                 |                 |                 |                 |                 |
| Grade 8                        |                 |                 |                 |                 |                 |                 |
| Grade 9                        |                 |                 |                 |                 |                 |                 |
| Grade 10                       |                 |                 |                 |                 |                 |                 |
| Grade 11                       |                 |                 |                 |                 |                 |                 |
| Grade 12                       |                 |                 |                 |                 |                 |                 |
| Adult                          | 150             | 160             | 160             | 160             | 160             | 160             |
| <b>Total Adult Enrollment:</b> | 150             | 160             | 160             | 160             | 160             | 160             |
| <b>Total K-12 Enrollment:</b>  | 0               | 0               | 0               | 0               | 0               | 0               |
| <b>Special Education #</b>     |                 |                 |                 |                 |                 |                 |
| <b>English Learners #</b>      |                 |                 |                 |                 |                 |                 |
| <b>FRL #</b>                   |                 |                 |                 |                 |                 |                 |
| <b>K-12 Distribution</b>       | \$ -            | \$ -            | \$ -            | \$ -            | \$ -            | \$ -            |
| <b>Adult Distribution</b>      | \$ 1,012,500.00 | \$ 1,080,000.00 | \$ 1,080,000.00 | \$ 1,080,000.00 | \$ 1,080,000.00 | \$ 1,080,000.00 |
| <b>Total Distribution</b>      | \$ 1,012,500.00 | \$ 1,080,000.00 | \$ 1,080,000.00 | \$ 1,080,000.00 | \$ 1,080,000.00 | \$ 1,080,000.00 |
| <b>Adjusted Distribution</b>   |                 | \$ 1,026,000.00 | \$ 1,047,600.00 | \$ 1,047,600.00 | \$ 1,069,200.00 | \$ 1,069,200.00 |

How "Total Distribution" is Calculated:

Basic Tuition Support (for schools with non-virtual students) is generally equal to:

$$(\text{Foundation Amount} \times \text{ADM}) + ((\text{Complexity Multiplier} \times \text{Complexity Index}) \times \text{ADM})$$

The Complexity calculation provides additional funding to school corporations serving proportionally more students from low-income families. It is based on the percentage of a school corporation's students receiving SNAP, TANF, or foster care services. For the sake of simplicity, the above calculation uses the Complexity Index for the school corporation in which the proposed charter school is located; however, as the Complexity Index is calculated based on the percentage of the specific charter school's students, the charter school's actual Complexity amount may differ. The total distribution (as adjusted) is carried over to Tab 4, Line 1 - Basic Tuition Support.

Total "State" tuition support includes "basic tuition support" plus any other "categorical" grants for which a school may be eligible (e.g., honors designation awards; special education grants; CTE grants). Average Daily Membership (ADM) is determined on two count dates (in September

and February). For ADM purposes, full day Kindergarten students are counted as 1.0, half-day kindergarten students are counted as 0.5.

The FY 2021 foundation amount is \$5,703. The FY 2021 complexity multiplier is \$3,675. The FY 2021 Adult Grant amount for adult high schools is \$6,750.

**5-Year Projected School Staffing Plan**

School Name: **The Excel Center - Shelbyville**  
Renewal Year: **2021 - 22 SY**

- Complete all relevant Grey Shaded areas -> Name of Position, Number of Positions, Average Salary, Health Insurance, Retirement Contribution, and Other Benefits.
- Projected salary and benefits must align with 5-Year budget.
- Please see footnotes below for additional information.

|                                         | Current Year |                                  |                      | Year 6     |                                  |                      | Year 7     |                                  |                      | Year 8     |                                  |                      | Year 9     |                                  |                      | Year 10    |                                  |                      |
|-----------------------------------------|--------------|----------------------------------|----------------------|------------|----------------------------------|----------------------|------------|----------------------------------|----------------------|------------|----------------------------------|----------------------|------------|----------------------------------|----------------------|------------|----------------------------------|----------------------|
|                                         | Number       | Average Salary (1)               | Total Expense        | Number     | Average Salary                   | Total Expense        | Number     | Average Salary                   | Total Expense        | Number     | Average Salary                   | Total Expense        | Number     | Average Salary                   | Total Expense        | Number     | Average Salary                   | Total Expense        |
| <b>INSTRUCTIONAL STAFF</b>              |              |                                  |                      |            |                                  |                      |            |                                  |                      |            |                                  |                      |            |                                  |                      |            |                                  |                      |
| Math Instructor                         | 1.0          | \$ 57,783.00                     | \$ 57,783.00         | 1.0        | \$ 59,516.49                     | \$ 59,516.49         | 1.0        | \$ 61,301.98                     | \$ 61,301.98         | 1.0        | \$ 63,141.04                     | \$ 63,141.04         | 1.0        | \$ 65,035.28                     | \$ 65,035.28         | 1.0        | \$ 66,986.33                     | \$ 66,986.33         |
| Math Instructor                         | 1.0          | \$ 51,500.00                     | \$ 51,500.00         | 1.0        | \$ 53,045.00                     | \$ 53,045.00         | 1.0        | \$ 54,636.35                     | \$ 54,636.35         | 1.0        | \$ 56,275.44                     | \$ 56,275.44         | 1.0        | \$ 57,963.70                     | \$ 57,963.70         | 1.0        | \$ 59,702.61                     | \$ 59,702.61         |
| Humanities Instructor                   | 1.0          | \$ 43,260.00                     | \$ 43,260.00         | 1.0        | \$ 45,320.00                     | \$ 45,320.00         | 1.0        | \$ 46,679.60                     | \$ 46,679.60         | 1.0        | \$ 48,079.99                     | \$ 48,079.99         | 1.0        | \$ 49,522.39                     | \$ 49,522.39         | 1.0        | \$ 51,008.06                     | \$ 51,008.06         |
| Humanities Instructor                   | 1.0          | \$ 44,000.00                     | \$ 44,000.00         | 1.0        | \$ 43,260.00                     | \$ 43,260.00         | 1.0        | \$ 44,557.80                     | \$ 44,557.80         | 1.0        | \$ 45,894.53                     | \$ 45,894.53         | 1.0        | \$ 47,271.37                     | \$ 47,271.37         | 1.0        | \$ 48,689.51                     | \$ 48,689.51         |
| Special Education Instructor            | 1.0          | \$ 45,448.96                     | \$ 45,448.96         | 1.0        | \$ 46,812.43                     | \$ 46,812.43         | 1.0        | \$ 48,216.80                     | \$ 48,216.80         | 1.0        | \$ 49,663.31                     | \$ 49,663.31         | 1.0        | \$ 51,153.20                     | \$ 51,153.20         | 1.0        | \$ 52,687.80                     | \$ 52,687.80         |
| Tutor                                   | 0.7          | \$ 23,630.67                     | \$ 15,359.94         | 0.7        | \$ 24,337.66                     | \$ 15,819.48         | 0.7        | \$ 25,067.79                     | \$ 16,294.06         | 0.7        | \$ 25,819.83                     | \$ 16,782.89         | 0.7        | \$ 26,594.42                     | \$ 17,286.37         | 0.7        | \$ 27,392.26                     | \$ 17,804.97         |
|                                         | \$ -         | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 |
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|                                         | \$ -         | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 |
| <b>Total Instructional Staff:</b>       | <b>5.7</b>   |                                  | <b>\$ 257,851.90</b> | <b>5.7</b> |                                  | <b>\$ 263,773.40</b> | <b>5.7</b> |                                  | <b>\$ 271,686.59</b> | <b>5.7</b> |                                  | <b>\$ 279,837.20</b> | <b>5.7</b> |                                  | <b>\$ 288,232.31</b> | <b>5.7</b> |                                  | <b>\$ 296,879.28</b> |
| <b>ADMIN &amp; SUPPORT</b>              |              |                                  |                      |            |                                  |                      |            |                                  |                      |            |                                  |                      |            |                                  |                      |            |                                  |                      |
| School Director                         | 1.0          | \$ 82,734.75                     | \$ 82,734.75         | 1.0        | \$ 86,044.14                     | \$ 86,044.14         | 1.0        | \$ 88,625.46                     | \$ 88,625.46         | 1.0        | \$ 91,284.23                     | \$ 91,284.23         | 1.0        | \$ 94,022.75                     | \$ 94,022.75         | 1.0        | \$ 96,843.44                     | \$ 96,843.44         |
| Manager of Office Administration        | 1.0          | \$ 40,038.37                     | \$ 40,038.37         | 1.0        | \$ 41,239.52                     | \$ 41,239.52         | 1.0        | \$ 42,476.71                     | \$ 42,476.71         | 1.0        | \$ 43,751.01                     | \$ 43,751.01         | 1.0        | \$ 45,063.54                     | \$ 45,063.54         | 1.0        | \$ 46,415.44                     | \$ 46,415.44         |
| College and Career Readiness Specialist | 1.0          | \$ 52,385.34                     | \$ 52,385.34         | 1.0        | \$ 53,956.90                     | \$ 53,956.90         | 1.0        | \$ 55,575.61                     | \$ 55,575.61         | 1.0        | \$ 57,242.88                     | \$ 57,242.88         | 1.0        | \$ 58,960.16                     | \$ 58,960.16         | 1.0        | \$ 60,728.97                     | \$ 60,728.97         |
| Life Coach                              | 1.0          | \$ 43,260.00                     | \$ 43,260.00         | 1.0        | \$ 44,557.80                     | \$ 44,557.80         | 1.0        | \$ 45,894.53                     | \$ 45,894.53         | 1.0        | \$ 47,271.37                     | \$ 47,271.37         | 1.0        | \$ 48,689.51                     | \$ 48,689.51         | 1.0        | \$ 50,150.20                     | \$ 50,150.20         |
| Drop-In Center Staff                    | 1.0          | \$ 24,766.14                     | \$ 24,766.14         | 1.0        | \$ 25,509.13                     | \$ 25,509.13         | 1.0        | \$ 26,274.40                     | \$ 26,274.40         | 1.0        | \$ 27,062.63                     | \$ 27,062.63         | 1.0        | \$ 27,874.51                     | \$ 27,874.51         | 1.0        | \$ 28,710.75                     | \$ 28,710.75         |
| Drop-In Center Staff                    | 0.8          | \$ 21,638.24                     | \$ 16,228.68         | 0.8        | \$ 23,566.40                     | \$ 17,674.80         | 0.8        | \$ 24,273.39                     | \$ 18,205.04         | 0.8        | \$ 25,001.59                     | \$ 18,751.19         | 0.8        | \$ 25,751.64                     | \$ 19,313.73         | 0.8        | \$ 26,524.19                     | \$ 19,893.14         |
|                                         | \$ -         | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 |
|                                         | \$ -         | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 |
|                                         | \$ -         | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 |
|                                         | \$ -         | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 |
|                                         | \$ -         | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 |
|                                         | \$ -         | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 |
|                                         | \$ -         | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 |
|                                         | \$ -         | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 |
|                                         | \$ -         | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 |
|                                         | \$ -         | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 |
|                                         | \$ -         | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 |
|                                         | \$ -         | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 |
|                                         | \$ -         | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 |
|                                         | \$ -         | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 | \$ -       | \$ -                             | \$ -                 |
| <b>Total Admin &amp; Support Staff:</b> | <b>5.8</b>   |                                  | <b>\$ 259,413.28</b> | <b>5.8</b> |                                  | <b>\$ 268,982.29</b> | <b>5.8</b> |                                  | <b>\$ 277,051.75</b> | <b>5.8</b> |                                  | <b>\$ 285,363.31</b> | <b>5.8</b> |                                  | <b>\$ 293,924.20</b> | <b>5.8</b> |                                  | <b>\$ 302,741.94</b> |
|                                         |              | <b>Rate/Per Employee Expense</b> | <b>Total Expense</b> |            | <b>Rate/Per Employee Expense</b> | <b>Total Expense</b> |            | <b>Rate/Per Employee Expense</b> | <b>Total Expense</b> |            | <b>Rate/Per Employee Expense</b> | <b>Total Expense</b> |            | <b>Rate/Per Employee Expense</b> | <b>Total Expense</b> |            | <b>Rate/Per Employee Expense</b> | <b>Total Expense</b> |
| <b>BENEFITS</b>                         |              |                                  |                      |            |                                  |                      |            |                                  |                      |            |                                  |                      |            |                                  |                      |            |                                  |                      |
| Health Insurance (2)                    |              | \$ 8,058.42                      | \$ 91,865.99         |            | \$ 7,863.10                      | \$ 89,639.34         |            | \$ 8,020.36                      | \$ 91,432.10         |            | \$ 8,180.77                      | \$ 93,260.78         |            | \$ 8,344.38                      | \$ 95,125.93         |            | \$ 8,511.27                      | \$ 97,028.48         |
| Retirement Contributions                |              | \$ 2,551.80                      | \$ 29,090.52         |            | \$ 2,539.30                      | \$ 28,948.02         |            | \$ 2,614.45                      | \$ 29,804.73         |            | \$ 2,692.88                      | \$ 30,698.83         |            | \$ 2,773.67                      | \$ 31,619.84         |            | \$ 2,856.88                      | \$ 32,568.43         |
| Social Security (3)                     |              | 6.2%                             | \$ 32,039.44         |            | 6.2%                             | \$ 33,030.85         |            | 6.2%                             | \$ 34,021.78         |            | 6.2%                             | \$ 35,042.43         |            | 6.2%                             | \$ 36,093.70         |            | 6.2%                             | \$ 37,176.52         |
| Medicare                                |              | 1.45%                            | \$ 7,493.10          |            | 1.45%                            | \$ 7,724.96          |            | 1.45%                            | \$ 7,966.71          |            | 1.45%                            | \$ 8,195.41          |            | 1.45%                            | \$ 8,441.27          |            | 1.45%                            | \$ 8,694.51          |
| Unemployment                            |              | 2.5%                             | \$ 12,919.13         |            | 2.5%                             | \$ 13,318.89         |            | 2.5%                             | \$ 13,718.48         |            | 2.5%                             | \$ 14,130.01         |            | 2.5%                             | \$ 14,553.91         |            | 2.5%                             | \$ 14,990.53         |
| Other Compensation (4)                  |              | \$ -                             | \$ -                 |            | \$ -                             | \$ -                 |            | \$ -                             | \$ -                 |            | \$ -                             | \$ -                 |            | \$ -                             | \$ -                 |            | \$ -                             | \$ -                 |

| <b>SUMMARY</b>             | Current Year  | Year 6        | Year 7        | Year 8        | Year 9        | Year 10       |
|----------------------------|---------------|---------------|---------------|---------------|---------------|---------------|
| Total Staff                | 11.4          | 11.4          | 11.4          | 11.4          | 11.4          | 11.4          |
| Total Salaries:            | \$ 516,738.18 | \$ 532,755.69 | \$ 548,738.35 | \$ 565,200.51 | \$ 582,156.51 | \$ 599,621.22 |
| Total Taxes & Benefits:    | \$ 173,408.17 | \$ 172,662.06 | \$ 176,933.78 | \$ 181,327.46 | \$ 185,834.66 | \$ 190,458.46 |
| Total Salaries + Benefits: | \$ 690,146.35 | \$ 705,417.75 | \$ 725,672.12 | \$ 746,527.97 | \$ 767,991.17 | \$ 790,079.69 |
| Student/teacher ratio      | 13:1          | 28:1          | 28:1          | 28:1          | 28:1          | 28:1          |
| Student/staff ratio        | 13:1          | 14:1          | 14:1          | 14:1          | 14:1          | 14:1          |

The information provided below does not, and is not intended to, constitute legal advice. Schools should consult with an attorney/accountant for any questions about employment matters.

- (1) Amounts paid to "employees" regardless of whether they are full-time, part-time, or limited-time should be included in the Average Salary column (lines 13-45) for each year. You should include all pay given to an employee for services performed, including salaries, vacation allowances, bonuses, stipends, commissions, and taxable fringe benefits. For more information, see <https://www.irs.gov/publications/p15>. Generally, a worker who performs services for you is your "employee" if you have the right to control what will be done and how it will be done. Do not include payments made to "independent contractors" (see (4) below). Please note that the IRS generally considers an individual rendering services as a substitute teacher to be an employee and not an independent contractor.
- (2) Health Insurance and Retirement Contributions should be calculated as a per employee expense and entered manually on lines S1 & S2 for each year.
- (3) Social Security, Medicare, and Unemployment are "employment taxes" which must be collected by the employer for all wages paid to individuals who are considered employees. The Worksheet calculates these amounts automatically based on the information entered in the Average Salary column for each year.
- (4) Include all other compensation, including non-taxable benefits (e.g., educational assistance, dependent care assistance, transportation benefits, non-taxable fringe benefits, etc.). In addition, all amounts paid to "independent contractors" should be listed in the Other Compensation line (line S6) and explained in the budget narrative. The general rule is that an individual is an independent contractor if you have the right to control or direct only the result of the work and not what will be done and how it will be done. There are many factors used by the IRS to determine whether an individual is an independent contractor. See, <https://www.irs.gov/businesses/small-businesses-self-employed/independent-contractor-self-employed-or-employee>.

**5-Year Projected Annual Operating Budget -- Fiscal Year July 1 - June 30**

School Name: The Excel Center - Shelbyville  
 Renewal Year: 2021 - 22 SY

**Special Instructions for Schools Contracting with a Management Company:**

Please include a note in the assumptions column and budget narrative if any of the listed amounts include additional service, consulting, facility, or licensing fees paid to a management company or affiliate of a management company that are not included in Line 97 (CMO/EMO fee). For example, you should note any additional fees for instructional or support supplies and resources; license fees for materials, software, or educational programming; or fees related to the management, sale, or lease of real estate. Please also state whether your facility is leased or purchased from a management company or affiliate of a management company.

| REVENUES                                               |                                                                        | Current Year           | Year 6                 | Year 7                 | Year 8                 | Year 9                 | Year 10                | Assumptions                                                          |
|--------------------------------------------------------|------------------------------------------------------------------------|------------------------|------------------------|------------------------|------------------------|------------------------|------------------------|----------------------------------------------------------------------|
| <b>State Revenue - See Footnotes</b>                   |                                                                        |                        |                        |                        |                        |                        |                        |                                                                      |
| 1                                                      | Basic Tuition Support (includes Complexity)- From Tab 2                | \$ 1,012,500.00        | \$ 1,026,000.00        | \$ 1,047,600.00        | \$ 1,047,600.00        | \$ 1,069,200.00        | \$ 1,069,200.00        | The "Adjusted Distribution" calculation from Tab 2 for Years 6 - 10. |
| 2                                                      | Honors Diploma Grant                                                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |                                                                      |
| 3                                                      | Special Education Grant                                                | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |                                                                      |
| 4                                                      | CTE Grant                                                              | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |                                                                      |
| 5                                                      | Charter and Innovation Network School Grant (1)                        | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |                                                                      |
| 6                                                      | Formative Assessment Grant                                             | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |                                                                      |
| 7                                                      | State Matching Funds for School Lunch Program                          | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |                                                                      |
| 8                                                      | High Ability (Gifted and Talented) Program                             | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |                                                                      |
| 9                                                      | Textbook Reimbursement                                                 | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |                                                                      |
| 10                                                     | Summer School                                                          | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |                                                                      |
| 11                                                     | Remediation Program Grant                                              | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |                                                                      |
| 12                                                     | Teacher Appreciation Grant                                             | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |                                                                      |
| 13                                                     | Other State Grants (please describe) (2)                               | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |                                                                      |
| <b>Total State Revenue:</b>                            |                                                                        | <b>\$ 1,012,500.00</b> | <b>\$ 1,026,000.00</b> | <b>\$ 1,047,600.00</b> | <b>\$ 1,047,600.00</b> | <b>\$ 1,069,200.00</b> | <b>\$ 1,069,200.00</b> |                                                                      |
| <b>Federal Revenue - See Footnotes</b>                 |                                                                        |                        |                        |                        |                        |                        |                        |                                                                      |
| 14                                                     | Public Charter School Program Grant (3)                                | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |                                                                      |
| 15                                                     | Charter Facilities Assistance Program Grant (2011)                     | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |                                                                      |
| 16                                                     | IDEA- Part B Grant (Special Education)                                 | \$ 20,000.00           | \$ 22,000.00           | \$ 22,440.00           | \$ 22,888.80           | \$ 23,346.58           | \$ 23,813.51           |                                                                      |
| 17                                                     | Title I                                                                | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |                                                                      |
| 18                                                     | Title II                                                               | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |                                                                      |
| 19                                                     | Federal Lunch Program                                                  | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |                                                                      |
| 20                                                     | Federal Breakfast Reimbursement                                        | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |                                                                      |
| 21                                                     | Other Federal Revenue (please describe)                                | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |                                                                      |
| <b>Total Federal Revenue:</b>                          |                                                                        | <b>\$ 20,000.00</b>    | <b>\$ 22,000.00</b>    | <b>\$ 22,440.00</b>    | <b>\$ 22,888.80</b>    | <b>\$ 23,346.58</b>    | <b>\$ 23,813.51</b>    |                                                                      |
| <b>Other Revenue</b>                                   |                                                                        |                        |                        |                        |                        |                        |                        |                                                                      |
| 22                                                     | Contributions and Donations from Private Sources                       | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |                                                                      |
| 23                                                     | Student Fees                                                           | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |                                                                      |
| 24                                                     | Other Fees                                                             | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |                                                                      |
| 25                                                     | Interest Income                                                        | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |                                                                      |
| 26                                                     | Other Revenue (please describe)                                        | \$ 15,606.00           | \$ 15,750.00           | \$ 16,065.00           | \$ 16,386.30           | \$ 16,714.03           | \$ 17,048.31           | E-rate reimbursement for internet                                    |
| <b>Total Other Revenue:</b>                            |                                                                        | <b>\$ 15,606.00</b>    | <b>\$ 15,750.00</b>    | <b>\$ 16,065.00</b>    | <b>\$ 16,386.30</b>    | <b>\$ 16,714.03</b>    | <b>\$ 17,048.31</b>    |                                                                      |
| <b>TOTAL REVENUE:</b>                                  |                                                                        | <b>\$ 1,048,106.00</b> | <b>\$ 1,063,750.00</b> | <b>\$ 1,086,105.00</b> | <b>\$ 1,086,875.10</b> | <b>\$ 1,109,260.60</b> | <b>\$ 1,110,061.81</b> |                                                                      |
| <b>EXPENSES</b>                                        |                                                                        |                        |                        |                        |                        |                        |                        |                                                                      |
| <b>Administrative Staff - See Footnote (4)</b>         |                                                                        |                        |                        |                        |                        |                        |                        |                                                                      |
| 27                                                     | Executive Administration: Office of Superintendent                     | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |                                                                      |
| 28                                                     | School Administration: Office of the Principal                         | \$ 122,773.12          | \$ 127,283.66          | \$ 131,102.17          | \$ 135,035.24          | \$ 139,086.29          | \$ 143,258.88          |                                                                      |
| 29                                                     | Other School Administration (please describe)                          | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |                                                                      |
| 30                                                     | Business Manager/Director of Finance                                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |                                                                      |
| <b>Total Administrative Staff:</b>                     |                                                                        | <b>\$ 122,773.12</b>   | <b>\$ 127,283.66</b>   | <b>\$ 131,102.17</b>   | <b>\$ 135,035.24</b>   | <b>\$ 139,086.29</b>   | <b>\$ 143,258.88</b>   |                                                                      |
| <b>Instructional Staff - See Footnotes</b>             |                                                                        |                        |                        |                        |                        |                        |                        |                                                                      |
| 31                                                     | Teachers - Regular                                                     | \$ 196,543.00          | \$ 201,141.49          | \$ 207,175.73          | \$ 213,391.01          | \$ 219,792.74          | \$ 226,386.52          |                                                                      |
| 32                                                     | Teachers - Special Education                                           | \$ 45,448.96           | \$ 46,812.43           | \$ 48,216.80           | \$ 49,663.31           | \$ 51,153.20           | \$ 52,687.80           |                                                                      |
| 33                                                     | Substitutes, Assistants, Paraprofessionals, Aides                      | \$ 15,359.94           | \$ 15,819.48           | \$ 16,294.06           | \$ 16,782.89           | \$ 17,286.37           | \$ 17,804.97           |                                                                      |
| 34                                                     | Summer School Staff                                                    | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |                                                                      |
| <b>Total Instructional Staff:</b>                      |                                                                        | <b>\$ 257,351.90</b>   | <b>\$ 263,773.40</b>   | <b>\$ 271,686.59</b>   | <b>\$ 279,837.21</b>   | <b>\$ 288,232.31</b>   | <b>\$ 296,879.29</b>   |                                                                      |
| <b>Non-Instructional/Support Staff - See Footnotes</b> |                                                                        |                        |                        |                        |                        |                        |                        |                                                                      |
| 35                                                     | Social Workers, Guidance Counselors, Therapists                        | \$ 95,645.34           | \$ 98,514.70           | \$ 101,470.14          | \$ 104,514.25          | \$ 107,649.67          | \$ 110,879.16          |                                                                      |
| 36                                                     | Instructional Support Staff (5)                                        | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |                                                                      |
| 37                                                     | Other Support Staff (please describe) (6)                              | \$ 40,994.82           | \$ 43,183.93           | \$ 44,479.45           | \$ 45,813.81           | \$ 47,188.24           | \$ 48,603.89           | Drop in Center Staff                                                 |
| 38                                                     | Nurse                                                                  | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |                                                                      |
| 39                                                     | Librarian                                                              | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |                                                                      |
| 40                                                     | Information Technology                                                 | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |                                                                      |
| 41                                                     | Maintenance of Buildings, Grounds, Equipment (include Custodial Staff) | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |                                                                      |
| 42                                                     | Security Personnel                                                     | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |                                                                      |
| 43                                                     | Athletic Coaches                                                       | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |                                                                      |
| <b>Total Non-Instructional/Support Staff:</b>          |                                                                        | <b>\$ 136,640.16</b>   | <b>\$ 141,698.63</b>   | <b>\$ 145,949.59</b>   | <b>\$ 150,328.06</b>   | <b>\$ 154,837.91</b>   | <b>\$ 159,483.05</b>   |                                                                      |
| <b>Subtotal Wages and Salaries:</b>                    |                                                                        | <b>\$ 516,765.18</b>   | <b>\$ 532,755.69</b>   | <b>\$ 548,738.35</b>   | <b>\$ 565,200.51</b>   | <b>\$ 582,156.51</b>   | <b>\$ 599,621.22</b>   |                                                                      |
| <b>Payroll Taxes and Benefits - From Tab 3</b>         |                                                                        |                        |                        |                        |                        |                        |                        |                                                                      |
| 44                                                     | Social Security/Medicare/Unemployment                                  | \$ 52,451.67           | \$ 54,074.70           | \$ 55,696.94           | \$ 57,367.85           | \$ 59,088.89           | \$ 60,861.55           |                                                                      |
| 45                                                     | Health Insurance                                                       | \$ 91,865.99           | \$ 89,639.34           | \$ 91,432.10           | \$ 93,260.78           | \$ 95,125.93           | \$ 97,028.48           |                                                                      |
| 46                                                     | Retirement Contributions                                               | \$ 29,090.52           | \$ 28,948.02           | \$ 29,804.73           | \$ 30,698.83           | \$ 31,619.84           | \$ 32,568.43           |                                                                      |
| 47                                                     | Other Compensation                                                     | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |                                                                      |
| <b>Total Payroll Taxes and Benefits:</b>               |                                                                        | <b>\$ 173,408.17</b>   | <b>\$ 172,662.06</b>   | <b>\$ 176,933.78</b>   | <b>\$ 181,327.46</b>   | <b>\$ 185,834.66</b>   | <b>\$ 190,458.46</b>   |                                                                      |
| <b>Total Personnel Expenses:</b>                       |                                                                        | <b>\$ 690,173.35</b>   | <b>\$ 705,417.75</b>   | <b>\$ 725,672.12</b>   | <b>\$ 746,527.97</b>   | <b>\$ 767,991.17</b>   | <b>\$ 790,079.69</b>   |                                                                      |
| <b>Instructional Supplies and Resources</b>            |                                                                        |                        |                        |                        |                        |                        |                        |                                                                      |
| 48                                                     | Textbooks                                                              | \$ 750.00              | \$ 750.00              | \$ 750.00              | \$ 750.00              | \$ 750.00              | \$ 750.00              |                                                                      |
| 49                                                     | Library/Media Services (Other than Staff)                              | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |                                                                      |
| 50                                                     | Technology Supporting Instruction (including computers, tablets, etc.) | \$ 36,000.00           | \$ 36,360.00           | \$ 36,724.00           | \$ 37,091.00           | \$ 37,462.00           | \$ 37,836.00           |                                                                      |
| 51                                                     | Student Assessment                                                     | \$ 900.00              | \$ 900.00              | \$ 900.00              | \$ 900.00              | \$ 900.00              | \$ 900.00              |                                                                      |
| 52                                                     | Instructional Software                                                 | \$ 1,500.00            | \$ 1,500.00            | \$ 1,500.00            | \$ 1,500.00            | \$ 1,500.00            | \$ 1,500.00            |                                                                      |
| 53                                                     | Professional Development                                               | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |                                                                      |
| 54                                                     | Enrichment Programs (athletics or extra-curricular activities)         | \$ 33,000.00           | \$ 35,000.00           | \$ 35,000.00           | \$ 35,000.00           | \$ 35,000.00           | \$ 35,000.00           | Certification Costs                                                  |
| 55                                                     | Other Instructional Supplies (not including technology)                | \$ 3,900.00            | \$ 3,938.00            | \$ 3,975.00            | \$ 4,014.00            | \$ 4,052.00            | \$ 4,091.00            |                                                                      |
| <b>Total Instructional Supplies and Resources:</b>     |                                                                        | <b>\$ 76,050.00</b>    | <b>\$ 78,448.00</b>    | <b>\$ 78,849.00</b>    | <b>\$ 79,255.00</b>    | <b>\$ 79,664.00</b>    | <b>\$ 80,077.00</b>    |                                                                      |
| <b>Administrative Resources</b>                        |                                                                        |                        |                        |                        |                        |                        |                        |                                                                      |



|                                                                           |                                                                      |                        |                        |                        |                        |                        |                        |                                                                                                      |
|---------------------------------------------------------------------------|----------------------------------------------------------------------|------------------------|------------------------|------------------------|------------------------|------------------------|------------------------|------------------------------------------------------------------------------------------------------|
| 56                                                                        | Administrative Technology - Computers & Software (not including SIS) | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |                                                                                                      |
| 57                                                                        | Other Administrative Expenses (please describe)                      | \$ 8,513.00            | \$ 8,518.00            | \$ 8,520.00            | \$ 8,523.00            | \$ 8,526.00            | \$ 8,528.00            | DUES & FEES and OPERATIONAL SUPPLIES, including Graduation                                           |
| <b>Total Administrative Resources:</b>                                    |                                                                      | <b>\$ 8,513.00</b>     | <b>\$ 8,518.00</b>     | <b>\$ 8,520.00</b>     | <b>\$ 8,523.00</b>     | <b>\$ 8,526.00</b>     | <b>\$ 8,528.00</b>     |                                                                                                      |
| <b>Governing Board Expenses</b>                                           |                                                                      |                        |                        |                        |                        |                        |                        |                                                                                                      |
| 58                                                                        | Legal Services                                                       | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |                                                                                                      |
| 59                                                                        | Other Governing Board Expenses (please describe)                     | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |                                                                                                      |
| <b>Total Board Expenses:</b>                                              |                                                                      | <b>\$ -</b>            | <b>\$ -</b>            | <b>\$ -</b>            | <b>\$ -</b>            | <b>\$ -</b>            | <b>\$ -</b>            |                                                                                                      |
| <b>Professional or Contracted Services (not including staff salaries)</b> |                                                                      |                        |                        |                        |                        |                        |                        |                                                                                                      |
| 60                                                                        | Audit Services                                                       | \$ 1,068.00            | \$ 1,079.00            | \$ 1,089.00            | \$ 1,100.00            | \$ 1,111.00            | \$ 1,122.00            |                                                                                                      |
| 61                                                                        | Payroll Services                                                     | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |                                                                                                      |
| 62                                                                        | Financial Accounting                                                 | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |                                                                                                      |
| 63                                                                        | Printing, Publishing, Duplicating Services                           | \$ 8,556.00            | \$ 8,556.00            | \$ 8,556.00            | \$ 8,556.00            | \$ 8,556.00            | \$ 8,556.00            |                                                                                                      |
| 64                                                                        | Telecommunication and IT Services                                    | \$ 1,440.00            | \$ 1,440.00            | \$ 1,440.00            | \$ 1,440.00            | \$ 1,440.00            | \$ 1,440.00            |                                                                                                      |
| 65                                                                        | Insurance (non-facility)                                             | \$ 2,400.00            | \$ 2,424.00            | \$ 2,448.00            | \$ 2,473.00            | \$ 2,497.00            | \$ 2,522.00            | This is the total insurance for all aspects of the school - we do not break it down by type of risk. |
| 66                                                                        | Travel                                                               | \$ 900.00              | \$ 900.00              | \$ 900.00              | \$ 900.00              | \$ 900.00              | \$ 900.00              |                                                                                                      |
| 67                                                                        | Mail Services                                                        | \$ 1,524.00            | \$ 1,524.00            | \$ 1,524.00            | \$ 1,524.00            | \$ 1,524.00            | \$ 1,524.00            |                                                                                                      |
| 68                                                                        | Special Education Administration                                     | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |                                                                                                      |
| 69                                                                        | Student Information Services                                         | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |                                                                                                      |
| 70                                                                        | Food Services                                                        | \$ 650.00              | \$ 500.00              | \$ 500.00              | \$ 500.00              | \$ 500.00              | \$ 500.00              |                                                                                                      |
| 71                                                                        | Transportation Services (please describe)                            | \$ 4,092.00            | \$ 4,125.00            | \$ 4,125.00            | \$ 4,125.00            | \$ 4,125.00            | \$ 4,125.00            | Bus Passes and Gas Assistance for students                                                           |
| 72                                                                        | Marketing Expenses                                                   | \$ 14,250.00           | \$ 10,000.00           | \$ 10,000.00           | \$ 10,000.00           | \$ 10,000.00           | \$ 10,000.00           |                                                                                                      |
| 73                                                                        | Other Professional or Contracted Services (please describe)          | \$ 3,744.00            | \$ 3,866.00            | \$ 3,889.00            | \$ 3,912.00            | \$ 3,935.00            | \$ 3,958.00            | Security and Student Barrier Removal                                                                 |
| <b>Total Professional or Contracted Services:</b>                         |                                                                      | <b>\$ 38,624.00</b>    | <b>\$ 34,414.00</b>    | <b>\$ 34,471.00</b>    | <b>\$ 34,530.00</b>    | <b>\$ 34,588.00</b>    | <b>\$ 34,647.00</b>    |                                                                                                      |
| <b>Facilities Expenses</b>                                                |                                                                      |                        |                        |                        |                        |                        |                        |                                                                                                      |
| 86                                                                        | Lease/Mortgage Payments (Facility)                                   | \$ 83,364.00           | \$ 87,840.00           | \$ 87,840.00           | \$ 87,840.00           | \$ 87,840.00           | \$ 87,840.00           |                                                                                                      |
| 85                                                                        | Capital Improvements                                                 | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |                                                                                                      |
| 76                                                                        | Principal Payments                                                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |                                                                                                      |
| 77                                                                        | Operating Lease Payments                                             | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |                                                                                                      |
| 78                                                                        | Interest Payments                                                    | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |                                                                                                      |
| 79                                                                        | Interest Expense                                                     | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |                                                                                                      |
| 80                                                                        | Depreciation Expense                                                 | \$ 31,976.00           | \$ 31,336.00           | \$ 29,770.00           | \$ 28,281.00           | \$ 26,867.00           | \$ 25,524.00           |                                                                                                      |
| 81                                                                        | Insurance (Facility)                                                 | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |                                                                                                      |
| 87                                                                        | Purchase of Furniture, Fixtures, and Equipment                       | \$ 9,225.00            | \$ 9,225.00            | \$ 9,225.00            | \$ 9,225.00            | \$ 9,225.00            | \$ 9,225.00            |                                                                                                      |
| 88                                                                        | Electric & Gas                                                       | \$ 24,000.00           | \$ 24,240.00           | \$ 24,482.00           | \$ 24,727.00           | \$ 24,974.00           | \$ 25,224.00           |                                                                                                      |
| 89                                                                        | Water & Sewage                                                       | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |                                                                                                      |
| 90                                                                        | Repair and Maintenance Services (include supply costs)               | \$ 2,381.00            | \$ 2,250.00            | \$ 2,250.00            | \$ 2,250.00            | \$ 2,250.00            | \$ 2,250.00            |                                                                                                      |
| 91                                                                        | Custodial Services (include supply costs)                            | \$ 15,000.00           | \$ 15,150.00           | \$ 15,302.00           | \$ 15,455.00           | \$ 15,609.00           | \$ 15,765.00           |                                                                                                      |
| 92                                                                        | Waste Disposal                                                       | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |                                                                                                      |
| 93                                                                        | Security Services                                                    | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |                                                                                                      |
| 95                                                                        | Other Facility Expense (please describe)                             | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |                                                                                                      |
| <b>Total Facilities Expenses:</b>                                         |                                                                      | <b>\$ 165,946.00</b>   | <b>\$ 170,041.00</b>   | <b>\$ 168,869.00</b>   | <b>\$ 167,778.00</b>   | <b>\$ 166,765.00</b>   | <b>\$ 165,828.00</b>   |                                                                                                      |
| <b>Other Expenses - See Footnotes</b>                                     |                                                                      |                        |                        |                        |                        |                        |                        |                                                                                                      |
| 96                                                                        | ICSB Administrative Fee (7)                                          | \$ 5,062.50            | \$ 5,130.00            | \$ 5,238.00            | \$ 5,238.00            | \$ 5,346.00            | \$ 5,346.00            |                                                                                                      |
| 97                                                                        | Management Fee - See Note at top of Worksheet & fn (8).              | \$ 187,164.00          | \$ 189,036.00          | \$ 190,926.00          | \$ 192,835.00          | \$ 194,764.00          | \$ 196,711.00          | Central Office Support Fees (INVOLVED FROM PROFESSIONAL SERVICES. SEE FOOTNOTES)                     |
| 98                                                                        | Bank Fees                                                            | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |                                                                                                      |
| 100                                                                       | Escrow (9)                                                           | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |                                                                                                      |
| 100                                                                       | Other Expenses (please describe)                                     | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |                                                                                                      |
| <b>Total Other Expenses:</b>                                              |                                                                      | <b>\$ 192,226.50</b>   | <b>\$ 194,166.00</b>   | <b>\$ 196,164.00</b>   | <b>\$ 198,073.00</b>   | <b>\$ 200,110.00</b>   | <b>\$ 202,057.00</b>   |                                                                                                      |
| <b>TOTAL EXPENSES:</b>                                                    |                                                                      | <b>\$ 1,171,532.85</b> | <b>\$ 1,191,004.75</b> | <b>\$ 1,212,545.12</b> | <b>\$ 1,234,686.97</b> | <b>\$ 1,257,644.17</b> | <b>\$ 1,281,216.69</b> |                                                                                                      |
| <b>CHANGE IN NET ASSETS:</b>                                              |                                                                      | <b>\$ (123,426.85)</b> | <b>\$ (127,254.75)</b> | <b>\$ (126,440.12)</b> | <b>\$ (147,811.87)</b> | <b>\$ (148,383.56)</b> | <b>\$ (171,154.87)</b> |                                                                                                      |

**Footnotes:**

- Charter schools meeting certain criteria are entitled to \$750 per student to be used for capital, technology, and transportation costs. Subsequent awards depend on continued funding of the grant in the biennial budget. See Indiana Code (IC) 20-24-13.
- Including, but not limited to: alternative education program grants (IC 20-30-8); educational technology plan grants (IC 20-20-13); school safety plan grants (IC 5-2-10.1-6); secured school fund grants (IC 10-21-1-2); dual language pilot program grants (IC 20-20-41-2); teacher and student achievement fund grants (IC 20-20-43-3); student and parent support services grants (IC 20-34-9); etc.
- This is a competitive grant. Funding is not guaranteed. The funding for the PCSP grant is distributed through a reimbursement process. Contact IDEOE's Office of Title Grants and Support for more information.
- Office of Superintendent includes the Head of School, School Leader, Executive Director, Chief Executive Officer, as well as associate or assistant executive positions; Office of the Principal includes Vice- and Assistant Principals; Other School Administration includes Chief Academic Officers; Directors, Deans, and Coordinators of: Curriculum, Instruction, Faculty, Students, Assessment, Student Affairs, Student Achievement, and similar positions.
- Includes Staffing for Instruction and Curriculum Development, Instructional Staff Training, etc.
- Secretary; Receptionist; Attendance Clerk; Office Manager, Cafeteria Worker, and other full or part-time employees not specifically described.
- One half percent (0.5%) of basic tuition support or adult learner grant amount received by the school.
- Include only those fees (per-pupil, contingent, or fixed) paid to a management company for educational or management services and describe how the fee is calculated in the budget narrative. All other or additional amounts paid to a management company or affiliate of the management company (e.g., lease payments, software, instructional material) must be accounted for, and described, elsewhere in this worksheet.
- Schools are required to maintain an account in reserve to cover expenses for school closing. \$10,000 should be placed in reserve starting in year 2 with a balance of \$30,000 by year 4.

**The Excel Center – Shelbyville**  
**Budget Narrative**

**State Funding:**

Fixed assumptions by ICSB have reduced the funding to \$6,412.50 for Year 6, \$6,547.50 for Years 7 and 8, and \$6,682.50 for the final two years of the projection. Based on the fixed scenario of reduced funding, it is assumed Excel Center seats remain capped at the current level.

**Federal Funding:**

Federal funding includes funding through the Part B Federal Special Education grants. Funding within the five-year budget is projected to increase 2%.

**Other Revenue:**

Includes the correcting offset to the ICSB Administrative Fee calculation in expenses, and the expected E-Rate Reimbursement for internet.

**Inflation:**

While certain expenses are likely to increase annually due to inflation. The budget model is using fairly flat expenses through the 5-year period except for salary and wage cost which were assumed to increase 3% per year.

**Salaries/Wages:**

As noted above, salaries and wages are assumed to increase approximately 3% per year. In the current job market we have not seen significant savings when positions turn over, so the 3% is assumed on the current staffing mix.

**Instructional Supplies and Resources, Support Supplies, and Purchased or Contracted Services:**

Prior year actual and current year budget were used to develop the 5-year projection. Expenses, such as internet, were budgeted at full cost rather than the discounted e-rate expense, and the expected reimbursement was recorded in Other Income.

**Depreciation:**

Depreciation is planned to decrease over this period as the original furniture and equipment coming to the end of its depreciable life, and very little furniture needs replaced. Technology refreshes and additions will be covered by CSP and GEER grants.

**Rent and Occupancy:**

We are currently in negotiation with our landlord to reduce the rent increase in the first option period of the lease. The 5-year projected amount is at the higher rate in our current lease.

Exhibit C

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 ICSB and IDOE. 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 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 ICSB may revoke the charter if ICSB deems that the recipient is not fulfilling the academic goals, fiscal management, or legal and operational responsibilities outlined in the charter.

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.

Betsy Delgado

Name



Signature

10/16/2020

Date