



## **The Excel Center - Anderson**

Application for Charter Renewal

October 2021

Presented to the Indiana Charter School Board  
by Goodwill Education Initiatives, Inc.

Exhibit B

**Renewal Application 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 - Anderson

**Charter School Address:** 630 Nichol Avenue  
Anderson, IN  
46016

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

**Mission Statement:** See below

**School Leader/Principal:** Miriam Henry

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

**Grade Levels and Student Enrollment**

Complete Tab 1 of either the [Enrollment Plan for K-12 Schools](#) or the [Enrollment Plan for Adult High Schools](#), as applicable. Please ensure that you are completing the correct Enrollment Plan.

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

**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

### Enrollment Plan for Adult High Schools Authorized by the Indiana Charter School Board

1. Please complete all appropriate grey cells. The first seven (7) lines are required.
2. The Enrollment Plan Approval Date on line 13 is the date the initial Enrollment Plan was approved as part of a Charter Application.
3. Enrollment Plan Amendments list the amendments, effective year, and approval date of those amendments to the school's Enrollment Plan that are approved pursuant to ICSB's Enrollment Plan Amendment Policy.

|                             |  |
|-----------------------------|--|
| Charter School Network:     | Excel Centers for Adult Learners       |
| Name of Charter School:     | The Excel Center - Anderson            |
| Designated Representative:  | Betsy Delgado                          |
| Contact Information:        | bdelgado@goodwillindy.org 317-524-4380 |
| Grade Span (Format: "X-X"): | AHS                                    |
| Maximum Enrollment:         | 300                                    |
| Year 1 (Format: "YYYY"):    | 2022                                   |
| Initial Approval Date:      |  |

Yearly Enrollment By Grade Level

| Grade Level                | Year 1<br>2022-23 | Year 2<br>2023-24 | Year 3<br>2024-25 | Year 4<br>2025-26 | Year 5<br>2026-27 | Maximum |
|----------------------------|-------------------|-------------------|-------------------|-------------------|-------------------|---------|
| 9                          |                   |                   |                   |                   |                   |         |
| 10                         |                   |                   |                   |                   |                   |         |
| 11                         |                   |                   |                   |                   |                   |         |
| 12                         |                   |                   |                   |                   |                   |         |
| AHS                        | 285               | 285               | 300               | 300               | 300               | 300     |
| Total Enrollment (School): | 285               | 285               | 300               | 300               | 300               | 300     |

Approved Amendments  
(Completed by ICSB)

Approval Date:

| Amended Enrollment |   |   |   |
|--------------------|---|---|---|
|                    |   |   |   |
|                    |   |   |   |
|                    |   |   |   |
|                    |   |   |   |
|                    |   |   |   |
| 0                  | 0 | 0 | 0 |

Amendment Notes

# 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, lower incomes, and fewer job opportunities than the general population.<sup>2</sup> In addition, high

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

<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

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 2021, The Excel Centers operated by GEI have produced over 6,100 graduates. In the most recent school year, 98% of all graduates earned either dual credit or an industry-recognized credential, with many students earning both. (see Chart 1 and Chart 2)

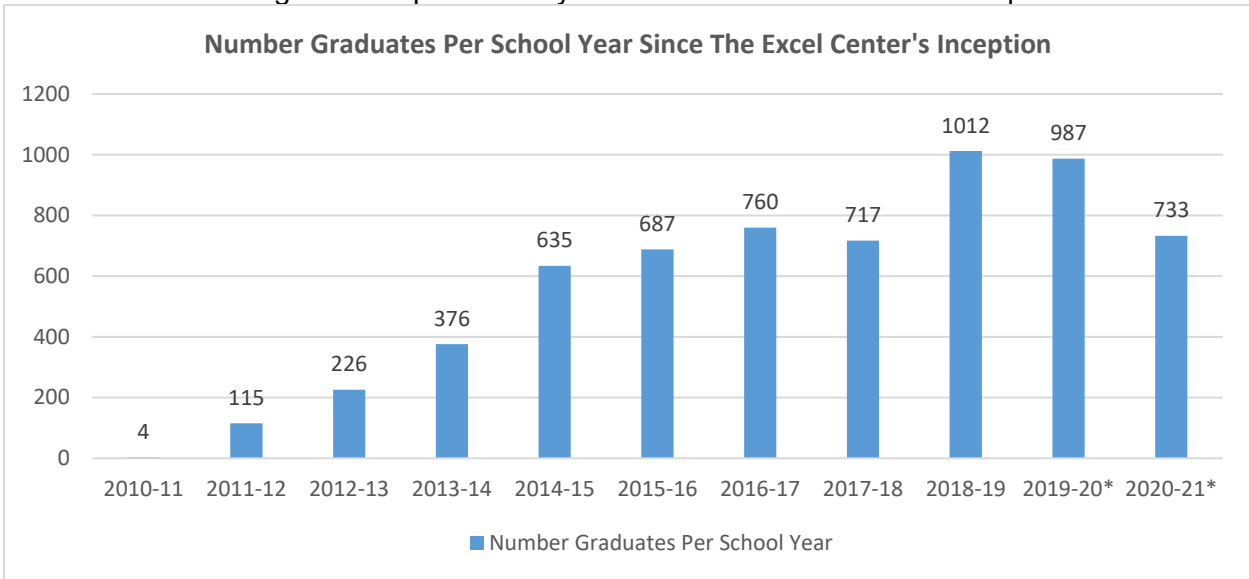
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[http://psidonline.isr.umich.edu/Publications/Papers/tsp/2005-03\\_Trends\\_in\\_household\\_01\\_03\\_July\\_05.pdf](http://psidonline.isr.umich.edu/Publications/Papers/tsp/2005-03_Trends_in_household_01_03_July_05.pdf)

<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)

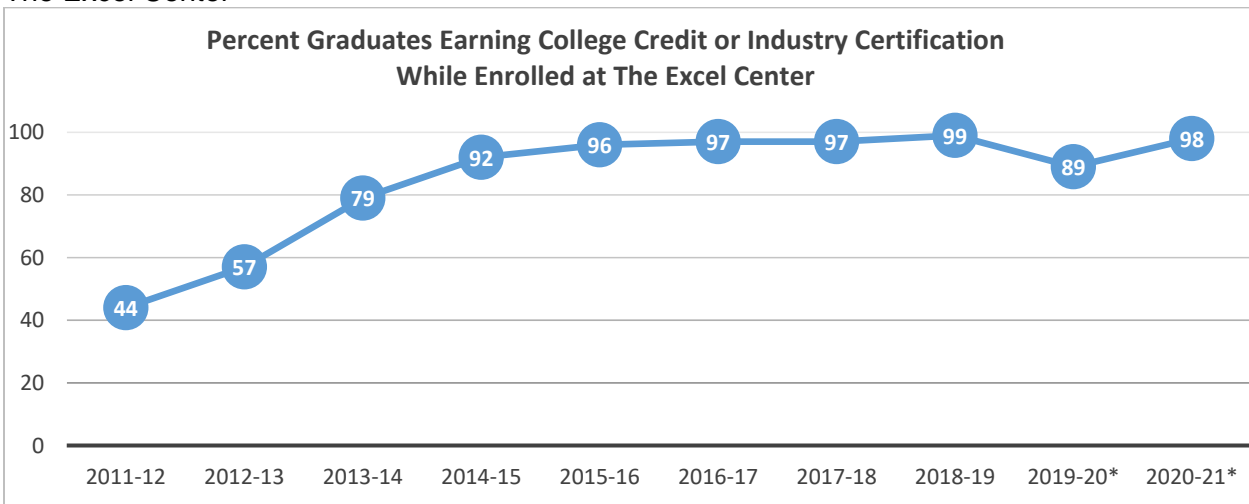
**Chart 1.** Number of graduates per school year since The Excel Center’s inception



*\*Note: SY2019-20 and SY2020-21 were severely disrupted by COVID -19. All educational opportunities shifted suddenly to virtual instruction in March 2020 and remained that way for the duration of the 2019-20 school year. Students returned to a hybrid structure for 2020-21; however, this still had significant impact on students.*

Aside from the number of graduates during the COVID-19 pandemic, 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 and SY2020-21 were severely disrupted by COVID -19, when all educational opportunities suddenly shifted to virtual instruction in March 2020. 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 – Anderson**

Through this charter renewal application, GEI is seeking the full renewal of The Excel Center - Anderson's charter. Like all other Excel Centers operated by GEI, The Excel Center – Anderson has a strong history of high quality academic, organizational, and financial performance. The Excel Center – Anderson proudly serves its community, serving close to 300 students at any given time.

The Excel Center - Anderson is a valued asset to the community it serves. It has a history of strong performance, having earned an "A" or "B" rating on the state's adult high school accountability system in each year of the school's operation. The Excel Center – Anderson has proudly received "Meets Standard" or "Exceeds Standard" in the majority of appraised categories of the Indiana Charter School Board's accountability framework. Even with a number of metrics not measurable as a result of the flexibility provided schools through HB 1514, the years leading up to that flexibility were marked with ongoing years of "Exceeds Standard" in terms of performance. Since opening in the 2012-13 school year, The Excel Center – Anderson has graduated 547 students as of the end of the 2020-21 school year. During the same school year, even with the ongoing impact of COVID-19, 98% of The Excel Center - Anderson graduates were still able to earn either dual credit, an industry-recognized credential, or both.

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 – Anderson 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 – Anderson has marked a number of successes since first opening its doors for the 2012-13 school year. For each of the school’s nine years of operation, The Excel Center – Anderson has earned an “A” or “B” based on Indiana’s adult high school accountability model. While the school has felt the impact of COVID-19 on the number of adults able to complete their diploma during the 2020-21 school year, The Excel Center – Anderson 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 – Anderson has also demonstrated an outstanding adult high school graduation rate, achieving a 68% in the first year of operation (SY 2012-13), and finishing the 2019-20 school year with an adult high school graduation rate of 93%. (Table 1)

The Excel Center – Anderson’s College and Career Readiness (CCR) rate has been a strong indicator of graduate quality throughout the school’s history. While the 2019-20 CCR rate is still very strong at 96%, this was the school’s lowest CCR rate in five years, demonstrating the outcome was 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 in pivoting to offer the clinical portion of the certification courses virtually, as well as struggled to administer the certification exams in a virtual manner. As a result, the school’s CCR rate was impacted not because of student performance but rather due to the inability of certification providers to offer the certification courses and/or exams in a safe, virtual setting. (Table 1)

**Table 1**

| <b>The Excel Center – ANDERSON</b>                                |                |                |                |                |                |                |                |                |                |
|---|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|
| <b>Graduates, Adult High School Graduation Rate, and CCR Rate</b> |                |                |                |                |                |                |                |                |                |
|   | <b>2012-13</b> | <b>2013-14</b> | <b>2014-15</b> | <b>2015-16</b> | <b>2016-17</b> | <b>2017-18</b> | <b>2018-19</b> | <b>2019-20</b> | <b>2020-21</b> |
| <b>Number Graduates per Year</b>                                  | 55             | 78             | 47             | 59             | 52             | 60             | 79             | 71             | 46             |
| <b>Adult High School Graduation Rate</b>                          | 68%            | 94%            | 53%            | 85%            | 74%            | 77%            | 108%           | 93%            | ---            |
| <b>CCR Rate</b>   | 76%            | 82%            | 91%            | 98%            | 98%            | 98%            | 100%           | 96%            | 98%            |

*\*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. SY2020-21 was also impacted, when the school used a hybrid instructional model and the inability to connect with all students face to face affected the school’s ability to connect with students and help remove barriers.*

As of the spring of 2021, The Excel Center – Anderson reached the milestone of helping nearly 550 Hoosiers who had previously left high school to earn their Indiana high school diploma. Of those nearly 550 graduates, on average 93% have left the school earning a dual credit, industry recognized credential, or both. If looking solely at the last charter renewal for the school, that College and Career Rate jumps to a 98% average for the last four years.



An additional success of the school is its proud partnership with Ivy Tech, collaborating to offer Excel Center – Anderson students dual credit and dual enrollment opportunities. Ivy Tech currently serves as the welding certification provider for The Excel Center – Anderson, and the schools are collaborating to add Certified Nursing Assistant (CNA) as a future certification offering to The Excel Center - Anderson. Beyond the partnership around course offerings, each term students nearing graduation and enrolled in The Excel Center – Anderson’s Senior Seminar class tour Ivy Tech to learn more about the options the school provides post-graduation. The relationship with Ivy Tech is an ongoing and valued partnership.

And finally, The Excel Center – Anderson shares a positive relationship with the local area school districts, who know The Excel Center to be a good partner in helping students to earn their diplomas. For students who find themselves approaching graduation but significantly behind in credits and unable to graduate on time, local school districts know The Excel Center is a rigorous option that will help students remove barriers to earn the credits they need to graduate with an Indiana high school diploma, even if it’s at a pace different than their peers.

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

In addition to these successes, The Excel Center – Anderson is working to address items identified within the Indiana Charter School Board (ICSB) Accountability System Dashboard. While the school was not measured on the metrics included in the Academic Success page for the most recent school year because of the flexibility provided in HB 1514, one area was identified as “Does Not Meet Standard” on the Academic Success page for the year prior, which The Excel Center – Anderson would like to address. 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 – Anderson has performed well in this area, having earned an adult high school graduation rate of 93% for

SY2019-20 and a 108% for SY2018-19. 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 – ANDERSON<br/>4-Year Graduation Rate Trends</b> |                |                |                |                |                |
|--|----------------|----------------|----------------|----------------|----------------|
|  | <b>2019-20</b> | <b>2018-19</b> | <b>2017-18</b> | <b>2016-17</b> | <b>2015-16</b> |
| <b>4-Year Cohort Graduation Rate</b>                                 | 23%            | 27%            | 19%            | 19%            | 21%            |
| <b>Adult High School Graduation Rate</b>                             | 93%            | 108%           | 77%            | 74%            | 85%            |

Additionally, The Excel Center – Anderson received a rating of “Does Not Meet Standard” for one standard under Financial Health:

- Standard 7: Cash Flow & Multi-Year Cash Flow (for The Excel Center – Anderson and The Excel Center LLC)

Because The Excel Center – Anderson’s operations were consistently cash flow positive, the school was able to invest in its community (replacing the roof), invest in the GEI Network (by allowing Clarksville and Bloomington to borrow funds for start-up), and save for the unknown future by putting money into investment/savings. These activities create the appearance that the school was cash flow negative; however, the funds remained within the GEI network.

GEI assessed a capital recovery charge to most Excel Centers to create a pool of funds with which to fund future capital needs of the network to eventually eliminate the inter-school payables and receivables. Because the additional fee reduced net income, The Excel Center - Anderson did not quite meet this requirement. This ratio will be factored into future capital recovery fees to ensure that each school meets the requirements on a stand-alone basis.

## **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 – Anderson charter renewal application articulates GEI’s plans and strategies for sustaining and continuing to build academic, organizational, and operational success over The Excel Center – Anderson’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 - Anderson. The GEI Board of Directors has operated for over seventeen years and has a demonstrated history of operating effectively and in a manner that supports schools to operate 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 – Anderson’ 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 to ensure that structures and mechanisms are in place to maintain GEI's 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, 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 CAT provides a community voice to the schools.

The goal is to have the CAT 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 – Anderson. 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 – Anderson. The leadership team at The Excel Center – Anderson is comprised of:

- School Director: Miriam Henry
- Lead Teacher: Kylie Barker
- Lead Coach: Melissa Green
- College & Career Readiness Specialist: Stu Erny
- Teacher of Record: Jack Alvarado

The school-based leadership team at The Excel Center – Anderson is also supported by the extended leadership team of GEI, which includes the Senior Vice President, Chief Mission & Education Officer; Vice President, Education Initiatives; Excel Center Regional Directors, 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 in performance, and capitalize on the expertise of the extended network to problem solve. This allows The Excel Center 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. GEI offers a training series is aptly named the Leadership Series in order to reflect its intentional focus on leadership development. GEI's other key training series consists of two distinct tracks, allowing activities to best align with the specific needs of the participants as it relates to the various roles within GEI. Evaluating and revising professional development 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 at least 5 times annually (once per Term) 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 and 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 regular Excel Center network-wide 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 Vice President, 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 their educational goals and moves at their 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 their 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.* 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*

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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)

*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 the 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 "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 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

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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>

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 securing 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 at times 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 – Anderson is still a challenge and an area of priority. The Excel Center - Anderson 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 - Anderson 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 – Anderson can help a student maintain their academic work and continue to make progress towards graduation.

An additional area of challenge for The Excel Center – Anderson has been around the Community Advisory Team (CAT) activity since COVID-19. As was the case with schools at the start of the pandemic, many community organizations and local businesses also turned their focus inward when COVID-19 first started and there was little information and no one knew what to expect. In that regard, The Excel Center – Anderson turned their immediate focus on the needs of staff and students, and while communication still took place with other community businesses and organizations, it was not the same as prior to COVID-19 when there were regular meetings and a pattern to many of the interactions. Since COVID-19, many community partners who previously served on The Excel Center – Anderson CAT have experienced significant staffing and leadership changes, prompting a need to establish relationships with new leaders in the community. A positive opportunity that has come out of this is The Excel Center – Anderson realizing that in addition to re-establishing a strong CAT, there is room for growth in the school becoming more active in the community. The Anderson Latino Coalition is a new coalition in Madison County to serve the area's Latino population. An Excel Center – Anderson staff member has started regularly participating in their meetings and the school sees this as an opportunity to engage with and contribute to the community.

The Excel Center – Anderson is also continuously looking for areas to develop future partnerships in order to remain responsive to the needs of the community and how that can tie

into post-secondary opportunities for students. The Excel Center – Anderson is currently working to develop a relationship with the city of Anderson and Purdue as it relates to their AAMP manufacturing program. Participants in the program earn industry certifications, which is certainly in alignment with The Excel Center model. Currently, though, the certifications offered through the AAMP program are not on the state’s approved certifications list. That being said, The Excel Center – Anderson is still willing to partner with the program to see if there are opportunities to have the certifications offered through this program added to the state’s list, as well as pursuing opportunities to partner dual credits with the work. Manufacturing is a definite need in Anderson and something the school sees as an opportunity for future growth.


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

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

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

While no formal changes are being requested to the charter for The Excel Center – Anderson at this time, the school is looking to relocate in the near future due to changes needed at the current facility that cannot be made without significant cost and impact to the school.

**Instructions for Renewal Budget Projections Workbook**

 = Information should be entered into light gray shaded cells.

**Name of Charter School:** Anderson Excel Center

**Location:** Anderson Community School Corp

**First Year of New Charter (Renewal Year):** 2022 - 23 SY

|   |   |
|---|---|
| <p><a href="#">1. Instructions</a></p>          | <ul style="list-style-type: none"> <li>• All organizers submitting a Charter Renewal Application to the Indiana Charter School Board must complete worksheets 1 through 4 of the Renewal Budget Projections Workbook. No information is required to be entered into WHITE cells, they will autofill as information is entered into GREY cells.</li> <li>• Column and Row references in these instructions are to the Excel spreadsheet Column or Row.</li> </ul>  |
| <p><a href="#">2. Enrollment Projection</a></p> | <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>   |
| <p><a href="#">3. Staffing Plan</a></p>         | <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. Please include both full and part-time employees and contractors. Projected salary and benefits should align with current and 5-Year budgets.</li> <li>• The estimated "average salary" for each position should include all taxable amounts (including taxable fringe benefits, stipends, bonuses, awards, and allowances).</li> <li>• "Other Insurance" includes health care, long-term care, life, disability.</li> <li>• "Other Benefits" are non-taxable benefits (e.g., educational assistance, dependent care assistance, transportation benefits, non-taxable fringe benefits, etc.).</li> </ul> |
| <p><a href="#">4. 5-Year Budget</a></p>         | <ul style="list-style-type: none"> <li>• Please provide budget projections for the Current Year and the next 5 years. Note that the information provided in Tab 3 must align with the personnel expenses provided in Tab 4 or Tab 4 will throw an ERROR.</li> </ul>   |
| <p>Notes:</p>                                   | <ul style="list-style-type: none"> <li>• Applicants proposing to operate a network of schools should add a worksheet or attach a separate file reflecting the consolidated network's 5-Year pro-forma budget, reflecting all components - including the regional back office/central office - of the Indiana network.</li> <li>• This template is not intended to be exhaustive. If it is unclear to which line a particular item of revenue or expense belongs, add it to the closest approximation or to one of the "other" categories and make a note in the budget narrative.</li> </ul>  |

**School Enrollment Projections**  
(must align with Renewal Application Enrollment Plan)

School Name: Anderson Excel Center  
 Location: Anderson Community School Corp  
 Renewal Year: 2022 - 23 SY

Is the school an Adult High School (please see instructions):  Yes  No Complete Rows 32 and 37-40 only.

| Enrollment                      | Current Year    | Year 1          | Year 2          | Year 3          | Year 4          | Year 5          | Notes & Instructions  |
|---------------------------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|---|
|                                 | 2021 - 22 SY    | 2022 - 23 SY    | 2023 - 24 SY    | 2024 - 25 SY    | 2025 - 26 SY    | 2026 - 27 SY    |   |
| Kindergarten                    |                 |                 |                 |                 |                 |                 | <p><b>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.</b></p> <p>1) An "adult high school" is a charter school that has a majority of enrolled students that: (1) belong to a graduation cohort that has already graduated; or (2) are over the age of eighteen (18) years of age; at the time the student was first enrolled at the school. <u>If you are an adult high school, complete Rows 32, and 37-40 only.</u></p> <p>2) A "virtual student" is defined as a student for whom at least fifty percent (50%) of the instructional services received from the school is virtual instruction. Virtual instruction means instruction that is provided in an interactive learning environment created through technology in which students are separated from their teacher by time or space, or both. Students receiving more than 50% of their instruction virtually generate eighty-five percent (85%) of the foundation formula amount rather than 100%. The analysis is applicable on a per student basis.</p> <p>3) The "basic" tuition support grant for K-12 schools is equal to the following formula:<br/><br/>                     (Foundation Amount X ADM) + ((Complexity Multiplier X Complexity Index) X ADM)</p> <p>The Distribution calculations are an estimate based on projected enrollment multiplied by basic tuition support in the amounts as set forth in the most recently passed (2021-23 FY) budget- Foundation = \$5,995 for the 2021-22 SY and \$6,235 for the 2022-23 SY (and beyond) and Complexity Multiplier = \$3,775. The school's actual distribution will be based on the school's ADM count of eligible pupils enrolled in the school on two count dates (in September and February) multiplied by the basic tuition support calculation. The calculation uses the Complexity Index for the school corporation in which the proposed charter school will be located- the school's actual Complexity Index amount will likely differ. The Special Education Grant amount is calculated on Tab 4 and uses the grant amount for mild/moderate disabilities (\$2,657 for the 2022-23 SY). The grant amount for severe disabilities is \$10,575 for the 2022-23 SY).</p> <p>4) The Adult Learner Grant amount for adult high schools is \$6,750. The Adult Distribution is calculated by multiplying Total Enrollment by the Adult Grant.</p> |
| Grade 1                         |                 |                 |                 |                 |                 |                 |   |
| Grade 2                         |                 |                 |                 |                 |                 |                 |   |
| Grade 3                         |                 |                 |                 |                 |                 |                 |   |
| Grade 4                         |                 |                 |                 |                 |                 |                 |   |
| Grade 5                         |                 |                 |                 |                 |                 |                 |   |
| Grade 6                         |                 |                 |                 |                 |                 |                 |   |
| Grade 7                         |                 |                 |                 |                 |                 |                 |   |
| Grade 8                         |                 |                 |                 |                 |                 |                 |   |
| Grade 9                         |                 |                 |                 |                 |                 |                 |   |
| Grade 10                        |                 |                 |                 |                 |                 |                 |   |
| Grade 11                        |                 |                 |                 |                 |                 |                 |   |
| Grade 12                        |                 |                 |                 |                 |                 |                 |   |
| <b>Total K-12 Enrollment:</b>   | 0               | 0               | 0               | 0               | 0               | 0               |   |
| Adult Learners (1)              | 285             | 285             | 300             | 300             | 300             | 300             |   |
| <b>Total Adult Enrollment:</b>  | 285             | 285             | 300             | 300             | 300             | 300             |   |
| <b>Estimated % of Students:</b> |                 |                 |                 |                 |                 |                 |   |
| Special Education               | 11%             | 11%             | 11%             | 11%             | 11%             | 11%             |   |
| English Learners                | 2%              | 2%              | 2%              | 2%              | 2%              | 2%              |   |
| Free/Reduced Priced Lunch       | 71%             | 71%             | 71%             | 71%             | 71%             | 71%             |   |
| Virtual Students (2)            | 0%              | 0%              | 0%              | 0%              | 0%              | 0%              |   |
| <b>K-12 Distribution (3)</b>    | \$ -            | \$ -            | \$ -            | \$ -            | \$ -            | \$ -            |   |
| <b>Adult Distribution (4)</b>   | \$ 1,923,750.00 | \$ 1,923,750.00 | \$ 2,025,000.00 | \$ 2,025,000.00 | \$ 2,025,000.00 | \$ 2,025,000.00 |   |

**5-Year Projected Staffing Plan**

School Name: Anderson Excel Center  
Renewal Year: 2022 - 23 SY

The information provided herein does not, and is not intended to, constitute legal advice. Schools should consult an attorney and/or accountant for any questions about employment and employment tax matters before completing this worksheet.

- 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 should align with Year 0 and 5-Year budgets.
- Please see footnotes below for additional information before completing the worksheet.

|   | Current Year |                           |                      | Year 1      |                           |                      | Year 2      |                           |                      | Year 3      |                           |                      | Year 4      |                           |                      | Year 5      |                           |                      |
|---|--------------|---------------------------|----------------------|-------------|---------------------------|----------------------|-------------|---------------------------|----------------------|-------------|---------------------------|----------------------|-------------|---------------------------|----------------------|-------------|---------------------------|----------------------|
|   | 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>              |              |                           |                      |             |                           |                      |             |                           |                      |             |                           |                      |             |                           |                      |             |                           |                      |
| Position (specify)                      |              | \$                        | \$                   |             | \$                        | \$                   |             | \$                        | \$                   |             | \$                        | \$                   |             | \$                        | \$                   |             | \$                        | \$                   |
| Lead Instructor                         | 1.0          | \$ 53,900.00              | \$ 53,900.00         | 1.0         | \$ 55,517.00              | \$ 55,517.00         | 1.0         | \$ 57,183.00              | \$ 57,183.00         | 1.0         | \$ 58,898.00              | \$ 58,898.00         | 1.0         | \$ 60,665.00              | \$ 60,665.00         | 1.0         | \$ 62,485.00              | \$ 62,485.00         |
| Humanities Instructor                   | 1.0          | \$ 47,641.00              | \$ 47,641.00         | 1.0         | \$ 49,070.00              | \$ 49,070.00         | 1.0         | \$ 50,542.00              | \$ 50,542.00         | 1.0         | \$ 52,059.00              | \$ 52,059.00         | 1.0         | \$ 53,620.00              | \$ 53,620.00         | 1.0         | \$ 55,229.00              | \$ 55,229.00         |
| Math Instructor                         | 1.0          | \$ 45,760.00              | \$ 45,760.00         | 1.0         | \$ 47,137.00              | \$ 47,137.00         | 1.0         | \$ 48,551.00              | \$ 48,551.00         | 1.0         | \$ 50,008.00              | \$ 50,008.00         | 1.0         | \$ 51,508.00              | \$ 51,508.00         | 1.0         | \$ 53,053.00              | \$ 53,053.00         |
| Science Instructor                      | 1.0          | \$ 43,120.00              | \$ 43,120.00         | 1.0         | \$ 44,414.00              | \$ 44,414.00         | 1.0         | \$ 45,746.00              | \$ 45,746.00         | 1.0         | \$ 47,118.00              | \$ 47,118.00         | 1.0         | \$ 48,532.00              | \$ 48,532.00         | 1.0         | \$ 49,988.00              | \$ 49,988.00         |
| Resource Instructor                     | 1.0          | \$ 43,120.00              | \$ 43,120.00         | 1.0         | \$ 44,414.00              | \$ 44,414.00         | 1.0         | \$ 45,746.00              | \$ 45,746.00         | 1.0         | \$ 47,118.00              | \$ 47,118.00         | 1.0         | \$ 48,532.00              | \$ 48,532.00         | 1.0         | \$ 49,988.00              | \$ 49,988.00         |
| Humanities Instructor                   | 1.0          | \$ 49,892.00              | \$ 49,892.00         | 1.0         | \$ 51,389.00              | \$ 51,389.00         | 1.0         | \$ 52,930.00              | \$ 52,930.00         | 1.0         | \$ 54,518.00              | \$ 54,518.00         | 1.0         | \$ 56,154.00              | \$ 56,154.00         | 1.0         | \$ 57,839.00              | \$ 57,839.00         |
| Distance Learning                       | 1.0          | \$ 18,486.00              | \$ 18,486.00         | 1.0         | \$ 17,135.00              | \$ 17,135.00         | 1.0         | \$ 19,712.00              | \$ 19,712.00         | 1.0         | \$ 20,302.00              | \$ 20,302.00         | 1.0         | \$ 20,908.00              | \$ 20,908.00         | 1.0         | \$ 21,535.00              | \$ 21,535.00         |
| Special Education Instructor            | 1.0          | \$ 43,752.00              | \$ 43,752.00         | 1.0         | \$ 45,065.00              | \$ 45,065.00         | 1.0         | \$ 46,416.00              | \$ 46,416.00         | 1.0         | \$ 47,809.00              | \$ 47,809.00         | 1.0         | \$ 49,243.00              | \$ 49,243.00         | 1.0         | \$ 50,721.00              | \$ 50,721.00         |
| Paraprofessional                        | 1.0          | \$ 24,768.00              | \$ 24,768.00         | 1.0         | \$ 25,511.00              | \$ 25,511.00         | 1.0         | \$ 26,276.00              | \$ 26,276.00         | 1.0         | \$ 27,065.00              | \$ 27,065.00         | 1.0         | \$ 27,877.00              | \$ 27,877.00         | 1.0         | \$ 28,713.00              | \$ 28,713.00         |
| Paraprofessional                        | 1.0          | \$ 27,479.00              | \$ 27,479.00         | 1.0         | \$ 28,303.00              | \$ 28,303.00         | 1.0         | \$ 29,152.00              | \$ 29,152.00         | 1.0         | \$ 30,027.00              | \$ 30,027.00         | 1.0         | \$ 30,928.00              | \$ 30,928.00         | 1.0         | \$ 31,856.00              | \$ 31,856.00         |
|   | \$           | \$                        | \$                   | \$          | \$                        | \$                   | \$          | \$                        | \$                   | \$          | \$                        | \$                   | \$          | \$                        | \$                   | \$          | \$                        | \$                   |
|   | \$           | \$                        | \$                   | \$          | \$                        | \$                   | \$          | \$                        | \$                   | \$          | \$                        | \$                   | \$          | \$                        | \$                   | \$          | \$                        | \$                   |
|   | \$           | \$                        | \$                   | \$          | \$                        | \$                   | \$          | \$                        | \$                   | \$          | \$                        | \$                   | \$          | \$                        | \$                   | \$          | \$                        | \$                   |
|   | \$           | \$                        | \$                   | \$          | \$                        | \$                   | \$          | \$                        | \$                   | \$          | \$                        | \$                   | \$          | \$                        | \$                   | \$          | \$                        | \$                   |
| <b>Total Instructional Staff:</b>       | <b>10.0</b>  |                           | <b>\$ 397,922.00</b> | <b>10.0</b> |                           | <b>\$ 407,955.00</b> | <b>10.0</b> |                           | <b>\$ 422,254.00</b> | <b>10.0</b> |                           | <b>\$ 434,922.00</b> | <b>10.0</b> |                           | <b>\$ 447,967.00</b> | <b>10.0</b> |                           | <b>\$ 461,407.00</b> |
| <b>ADMIN &amp; SUPPORT</b>              |              |                           |                      |             |                           |                      |             |                           |                      |             |                           |                      |             |                           |                      |             |                           |                      |
| Position (specify)                      |              | \$                        | \$                   |             | \$                        | \$                   |             | \$                        | \$                   |             | \$                        | \$                   |             | \$                        | \$                   |             | \$                        | \$                   |
| School Director                         | 1.0          | \$ 81,404.00              | \$ 81,404.00         | 1.0         | \$ 83,846.00              | \$ 83,846.00         | 1.0         | \$ 86,361.00              | \$ 86,361.00         | 1.0         | \$ 88,952.00              | \$ 88,952.00         | 1.0         | \$ 91,621.00              | \$ 91,621.00         | 1.0         | \$ 94,370.00              | \$ 94,370.00         |
| Manager, Office Administration          | 1.0          | \$ 43,856.00              | \$ 43,856.00         | 1.0         | \$ 47,172.00              | \$ 47,172.00         | 1.0         | \$ 46,527.00              | \$ 46,527.00         | 1.0         | \$ 47,923.00              | \$ 47,923.00         | 1.0         | \$ 49,360.00              | \$ 49,360.00         | 1.0         | \$ 50,841.00              | \$ 50,841.00         |
| Lead Coach                              | 1.0          | \$ 53,980.00              | \$ 53,980.00         | 1.0         | \$ 55,599.00              | \$ 55,599.00         | 1.0         | \$ 57,267.00              | \$ 57,267.00         | 1.0         | \$ 58,985.00              | \$ 58,985.00         | 1.0         | \$ 60,755.00              | \$ 60,755.00         | 1.0         | \$ 62,578.00              | \$ 62,578.00         |
| Coach 1                                 | 1.0          | \$ 44,182.00              | \$ 44,182.00         | 1.0         | \$ 45,507.00              | \$ 45,507.00         | 1.0         | \$ 46,873.00              | \$ 46,873.00         | 1.0         | \$ 48,279.00              | \$ 48,279.00         | 1.0         | \$ 49,727.00              | \$ 49,727.00         | 1.0         | \$ 51,219.00              | \$ 51,219.00         |
| Coach 2                                 | 1.0          | \$ 45,765.00              | \$ 45,765.00         | 1.0         | \$ 47,138.00              | \$ 47,138.00         | 1.0         | \$ 48,552.00              | \$ 48,552.00         | 1.0         | \$ 50,009.00              | \$ 50,009.00         | 1.0         | \$ 51,509.00              | \$ 51,509.00         | 1.0         | \$ 53,054.00              | \$ 53,054.00         |
| Coach 3                                 | 1.0          | \$ 44,792.00              | \$ 44,792.00         | 1.0         | \$ 46,136.00              | \$ 46,136.00         | 1.0         | \$ 47,520.00              | \$ 47,520.00         | 1.0         | \$ 48,945.00              | \$ 48,945.00         | 1.0         | \$ 50,414.00              | \$ 50,414.00         | 1.0         | \$ 51,926.00              | \$ 51,926.00         |
| College and Career Readiness            | 1.0          | \$ 51,444.00              | \$ 51,444.00         | 1.0         | \$ 52,987.00              | \$ 52,987.00         | 1.0         | \$ 54,577.00              | \$ 54,577.00         | 1.0         | \$ 56,214.00              | \$ 56,214.00         | 1.0         | \$ 57,901.00              | \$ 57,901.00         | 1.0         | \$ 59,638.00              | \$ 59,638.00         |
| Childcare Manager                       | 1.0          | \$ 40,711.00              | \$ 40,711.00         | 1.0         | \$ 41,932.00              | \$ 41,932.00         | 1.0         | \$ 43,190.00              | \$ 43,190.00         | 1.0         | \$ 44,486.00              | \$ 44,486.00         | 1.0         | \$ 45,821.00              | \$ 45,821.00         | 1.0         | \$ 47,195.00              | \$ 47,195.00         |
| Childcare Attendant                     | 1.0          | \$ 22,058.00              | \$ 22,058.00         | 1.0         | \$ 22,720.00              | \$ 22,720.00         | 1.0         | \$ 23,401.00              | \$ 23,401.00         | 1.0         | \$ 24,103.00              | \$ 24,103.00         | 1.0         | \$ 24,826.00              | \$ 24,826.00         | 1.0         | \$ 25,571.00              | \$ 25,571.00         |
| Childcare Attendant                     | 0.5          | \$ 23,620.00              | \$ 11,810.00         | 0.5         | \$ 24,329.00              | \$ 12,164.50         | 0.5         | \$ 25,068.00              | \$ 12,529.00         | 0.5         | \$ 25,810.00              | \$ 12,905.00         | 0.5         | \$ 26,585.00              | \$ 13,292.50         | 0.5         | \$ 27,382.00              | \$ 13,691.00         |
|   | \$           | \$                        | \$                   | \$          | \$                        | \$                   | \$          | \$                        | \$                   | \$          | \$                        | \$                   | \$          | \$                        | \$                   | \$          | \$                        | \$                   |
|   | \$           | \$                        | \$                   | \$          | \$                        | \$                   | \$          | \$                        | \$                   | \$          | \$                        | \$                   | \$          | \$                        | \$                   | \$          | \$                        | \$                   |
|   | \$           | \$                        | \$                   | \$          | \$                        | \$                   | \$          | \$                        | \$                   | \$          | \$                        | \$                   | \$          | \$                        | \$                   | \$          | \$                        | \$                   |
|   | \$           | \$                        | \$                   | \$          | \$                        | \$                   | \$          | \$                        | \$                   | \$          | \$                        | \$                   | \$          | \$                        | \$                   | \$          | \$                        | \$                   |
| <b>Total Admin &amp; Support Staff:</b> | <b>9.5</b>   |                           | <b>\$ 440,002.00</b> | <b>9.5</b>  |                           | <b>\$ 455,201.50</b> | <b>9.5</b>  |                           | <b>\$ 466,797.00</b> | <b>9.5</b>  |                           | <b>\$ 480,801.00</b> | <b>9.5</b>  |                           | <b>\$ 495,226.50</b> | <b>9.5</b>  |                           | <b>\$ 510,083.00</b> |
|   |              | Rate/Per Employee Expense | Total Expense        |             | Rate/Per Employee Expense | Total Expense        |             | Rate/Per Employee Expense | Total Expense        |             | Rate/Per Employee Expense | Total Expense        |             | Rate/Per Employee Expense | Total Expense        |             | Rate/Per Employee Expense | Total Expense        |
| <b>BENEFITS</b>                         |              | \$                        | \$                   |             | \$                        | \$                   |             | \$                        | \$                   |             | \$                        | \$                   |             | \$                        | \$                   |             | \$                        | \$                   |
| Health Insurance (2)                    |              | \$ 6,003.28               | \$ 117,063.96        |             | \$ 7,653.18               | \$ 149,237.01        |             | \$ 7,882.72               | \$ 153,713.04        |             | \$ 8,119.23               | \$ 158,324.99        |             | \$ 8,362.82               | \$ 163,074.99        |             | \$ 8,613.71               | \$ 167,967.35        |
| Retirement Contributions (3)            |              | \$ 2,578.45               | \$ 50,279.78         |             | \$ 2,655.85               | \$ 51,789.08         |             | \$ 2,725.54               | \$ 53,343.03         |             | \$ 2,817.59               | \$ 54,943.01         |             | \$ 2,902.15               | \$ 56,591.93         |             | \$ 2,989.18               | \$ 58,289.01         |
| Social Security                         |              | 6.2%                      | \$ 51,951.29         |             | 6.2%                      | \$ 53,515.70         |             | 6.2%                      | \$ 55,121.16         |             | 6.2%                      | \$ 56,774.83         |             | 6.2%                      | \$ 58,478.00         |             | 6.2%                      | \$ 60,232.38         |
| Medicare                                |              | 1.45%                     | \$ 12,149.90         |             | 1.45%                     | \$ 12,515.77         |             | 1.45%                     | \$ 12,891.24         |             | 1.45%                     | \$ 13,277.98         |             | 1.45%                     | \$ 13,676.31         |             | 1.45%                     | \$ 14,086.61         |
| Unemployment                            |              | 2.5%                      | \$ 20,948.10         |             | 2.5%                      | \$ 21,578.91         |             | 2.5%                      | \$ 22,226.28         |             | 2.5%                      | \$ 22,893.08         |             | 2.5%                      | \$ 23,579.84         |             | 2.5%                      | \$ 24,287.25         |
| Other Compensation (4)                  |              | \$                        | \$                   |             | \$                        | \$                   |             | \$                        | \$                   |             | \$                        | \$                   |             | \$                        | \$                   |             | \$                        | \$                   |

| SUMMARY | Current Year |                 |                | Year 1      |                 |                | Year 2      |                 |                | Year 3      |                 |                | Year 4      |                 |                | Year 5      |                 |                |
|---------|--------------|-----------------|----------------|-------------|-----------------|----------------|-------------|-----------------|----------------|-------------|-----------------|----------------|-------------|-----------------|----------------|-------------|-----------------|----------------|
|         | Total Staff  | Total Salaries  | Total Benefits | Total Staff | Total Salaries  | Total Benefits | Total Staff | Total Salaries  | Total Benefits | Total Staff | Total Salaries  | Total Benefits | Total Staff | Total Salaries  | Total Benefits | Total Staff | Total Salaries  | Total Benefits |
|         | 19.5         | \$ 837,924.00   | \$ 252,393.02  | 19.5        | \$ 863,156.50   | \$ 288,636.47  | 19.5        | \$ 889,051.00   | \$ 297,294.75  | 19.5        | \$ 915,723.00   | \$ 306,213.87  | 19.5        | \$ 943,193.50   | \$ 315,401.06  | 19.5        | \$ 971,490.00   | \$ 324,862.59  |
|         |              | \$ 1,090,317.02 |                |             | \$ 1,151,792.97 |                |             | \$ 1,186,345.75 |                |             | \$ 1,221,936.87 |                |             | \$ 1,258,594.56 |                |             | \$ 1,296,352.59 |                |
|         | 30:1         |                 |                | 30:1        |                 |                | 30:1        |                 |                | 32:1        |                 |                | 32:1        |                 |                | 32:1        |                 |                |

**Footnotes:**

**A note about classifying workers:**

Generally, an individual who performs services for you is your "employee" if you have the right to control what work will be done and how it will be done. An individual who performs services for you is an "independent contractor" if you have the right to control or direct only the result of the work, but not what will be done and how it will be done. This is an important distinction because an employee's wages are subject to employment tax withholding while an independent contractor's earnings are subject to self-employment tax. However, there are many factors used by the IRS to determine whether an individual is an employee or independent contractor. See, <https://www.irs.gov/businesses/small-businesses-self-employed/independent-contractor-self-employed-or-employee>. Please note that the IRS has issued a number of rulings and advisory opinions holding, based on the specific facts, that an individual rendering services as a substitute teacher should be considered to be an employee and not an independent contractor. Misclassification of an employee as an independent contractor may result in additional payroll taxes due, as well as possible interest and penalties. **Please consult your attorney before classifying an employee. Payments made to "independent contractors" should be listed as "Other Compensation" on Row 58, and explained in the budget narrative. Do not include payments made to independent contractors on Rows 15-47.**

(1) Amounts paid to "employees" regardless of whether they are full-time, part-time, or limited-time should be listed in the **Average Salary** column (Rows 15-47) for each year. All pay provided to an employee for services performed should be included, including salaries, vacation allowances, bonuses, stipends, commissions, and taxable fringe benefits. For more information, see <https://www.govpublications/p15>.

(2) **Health Insurance** includes Group Life Insurance, Group Health Insurance, Group Accident Insurance, Other Authorized Group Insurance, and Workers Compensation Insurance.

(3) **Retirement Contributions** includes Severance/Early Retirement Pay, Public Employees Retirement Fund, Teachers Retirement Fund, Public Employees Retirement Fund (Optional Contribution), Teacher Retirement Fund (Optional Contribution).

(4) **Other Compensation** - includes any other benefits not otherwise classified above, including payments made to independent contractors. This cell should reflect the sum total of all Other Compensation for the year.





|  |                        |                        |                        |                        |                        |                        |
|--|------------------------|------------------------|------------------------|------------------------|------------------------|------------------------|
| Information Technology   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |
| Maintenance of Buildings, Grounds, Equipment (including Custodial Staff)   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |
| Security Personnel   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |
| Athletic Coaches   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |
| <b>Total Non-Instructional/Support Staff:</b>                              | <b>\$ 314,742.00</b>   | <b>\$ 324,184.00</b>   | <b>\$ 333,910.00</b>   | <b>\$ 343,927.00</b>   | <b>\$ 354,245.00</b>   | <b>\$ 364,872.00</b>   |
| <b>Subtotal Wages and Salaries:</b>  | <b>\$ 837,924.00</b>   | <b>\$ 863,156.50</b>   | <b>\$ 889,051.00</b>   | <b>\$ 915,723.00</b>   | <b>\$ 943,193.50</b>   | <b>\$ 971,490.00</b>   |
| <b>Payroll Taxes and Benefits - From Tab 3</b>                             |                        |                        |                        |                        |                        |                        |
| Social Security/Medicare/Unemployment                                      | \$ 85,049.29           | \$ 87,610.38           | \$ 90,238.68           | \$ 92,945.88           | \$ 95,734.14           | \$ 98,606.24           |
| Health Insurance   | \$ 117,063.96          | \$ 149,237.01          | \$ 153,713.04          | \$ 158,324.99          | \$ 163,074.99          | \$ 167,967.35          |
| Retirement Contributions   | \$ 50,279.78           | \$ 51,789.08           | \$ 53,343.03           | \$ 54,943.01           | \$ 56,591.93           | \$ 58,289.01           |
| Other Compensation (please describe)                                       | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |
| <b>Total Payroll Taxes and Benefits:</b>                                   | <b>\$ 252,393.02</b>   | <b>\$ 288,636.47</b>   | <b>\$ 297,294.75</b>   | <b>\$ 306,213.87</b>   | <b>\$ 315,401.06</b>   | <b>\$ 324,862.59</b>   |
| <b>Total Personnel Expenses:</b>   | <b>\$ 1,090,317.02</b> | <b>\$ 1,151,792.97</b> | <b>\$ 1,186,345.75</b> | <b>\$ 1,221,936.87</b> | <b>\$ 1,258,594.56</b> | <b>\$ 1,296,352.59</b> |
| <b>Instructional Supplies and Resources - See Footnotes</b>                |                        |                        |                        |                        |                        |                        |
| Textbooks  | \$ 1,425.00            | \$ 1,453.00            | \$ 1,483.00            | \$ 1,512.00            | \$ 1,542.00            | \$ 1,573.00            |
| Library/Media Services (Other than Staff)                                  | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |
| Technology Supporting Instruction (computers, tablets, etc.)               | \$ 4,275.00            | \$ 4,191.00            | \$ 4,275.00            | \$ 4,360.00            | \$ 4,448.00            | \$ 4,537.00            |
| Student Assessment   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |
| Instructional Software   | \$ 4,344.00            | \$ 4,421.00            | \$ 4,509.00            | \$ 4,599.00            | \$ 4,691.00            | \$ 4,785.00            |
| Professional Development   | \$ 4,000.00            | \$ 4,040.00            | \$ 4,080.00            | \$ 4,121.00            | \$ 4,162.00            | \$ 4,204.00            |
| Enrichment Programs (athletics or extra-curricular activities)             | \$ 5,700.00            | \$ 5,757.00            | \$ 5,815.00            | \$ 5,872.00            | \$ 5,931.00            | \$ 5,991.00            |
| Other Instructional Supplies (please describe)                             | \$ 67,259.00           | \$ 67,932.00           | \$ 68,611.00           | \$ 69,297.00           | \$ 69,990.00           | \$ 70,690.00           |
| <b>Total Instructional Supplies and Resources:</b>                         | <b>\$ 87,003.00</b>    | <b>\$ 87,794.00</b>    | <b>\$ 88,773.00</b>    | <b>\$ 89,761.00</b>    | <b>\$ 144,164.00</b>   | <b>\$ 91,780.00</b>    |
| <b>Administrative Resources</b>  |                        |                        |                        |                        |                        |                        |
| Administrative Technology - Computers & Software (not SIS)                 | \$ 3,344.00            | \$ 3,411.00            | \$ 3,479.00            | \$ 3,549.00            | \$ 3,620.00            | \$ 3,692.00            |
| Other Administrative Expenses (please describe)                            | \$ 12,505.00           | \$ 12,630.00           | \$ 12,756.00           | \$ 12,884.00           | \$ 13,013.00           | \$ 13,143.00           |
| <b>Total Administrative Resources:</b>                                     | <b>\$ 15,849.00</b>    | <b>\$ 16,041.00</b>    | <b>\$ 16,235.00</b>    | <b>\$ 16,433.00</b>    | <b>\$ 16,633.00</b>    | <b>\$ 16,835.00</b>    |
| <b>Governing Board Expenses</b>  |                        |                        |                        |                        |                        |                        |
| Legal Services   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |
| Other Governing Board Expenses (please describe)                           | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |
| <b>Total Governing Board Expenses:</b>                                     | <b>\$ -</b>            | <b>\$ -</b>            | <b>\$ -</b>            | <b>\$ -</b>            | <b>\$ -</b>            | <b>\$ -</b>            |
| <b>Purchased or Other Services (do not include staff expenses)</b>         |                        |                        |                        |                        |                        |                        |
| Audit Services   | \$ 2,000.00            | \$ 2,020.00            | \$ 2,040.00            | \$ 2,061.00            | \$ 2,081.00            | \$ 2,102.00            |
| Payroll Services   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |
| Financial Accounting   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |
| Printing, Publishing, Duplicating Services                                 | \$ 5,000.00            | \$ 5,100.00            | \$ 5,202.00            | \$ 5,306.00            | \$ 5,416.00            | \$ 5,520.00            |
| Telecommunication & IT Services  | \$ 28,812.00           | \$ 29,100.00           | \$ 29,391.00           | \$ 29,685.00           | \$ 29,982.00           | \$ 30,282.00           |
| Insurance (non-facility)   | \$ 4,600.00            | \$ 4,646.00            | \$ 4,692.00            | \$ 4,739.00            | \$ 4,787.00            | \$ 4,835.00            |
| Travel   | \$ 4,800.00            | \$ 4,848.00            | \$ 4,896.00            | \$ 4,945.00            | \$ 4,995.00            | \$ 5,045.00            |
| Mail Services  | \$ 888.00              | \$ 906.00              | \$ 924.00              | \$ 942.00              | \$ 961.00              | \$ 980.00              |
| Special Education Administration   | \$ 5,570.00            | \$ 5,828.00            | \$ 5,944.00            | \$ 6,063.00            | \$ 6,184.00            | \$ 6,308.00            |
| Student Information Services or Systems                                    | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |
| Food Services  | \$ 1,100.00            | \$ 1,111.00            | \$ 1,122.00            | \$ 1,133.00            | \$ 1,145.00            | \$ 1,156.00            |
| Transportation Services  | \$ 1,000.00            | \$ 1,010.00            | \$ 1,020.00            | \$ 1,030.00            | \$ 1,041.00            | \$ 1,051.00            |
| Marketing Expenses   | \$ 18,000.00           | \$ 18,180.00           | \$ 18,362.00           | \$ 18,545.00           | \$ 18,731.00           | \$ 18,918.00           |
| Other Services (please describe)   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |
| <b>Total Professional Purchased or Other Services:</b>                     | <b>\$ 71,770.00</b>    | <b>\$ 72,749.00</b>    | <b>\$ 71,593.00</b>    | <b>\$ 74,449.00</b>    | <b>\$ 75,323.00</b>    | <b>\$ 76,197.00</b>    |
| <b>Facilities Expenses (do not include staff expenses, e.g. custodian)</b> |                        |                        |                        |                        |                        |                        |
| Facility Lease/Mortgage Payments (please describe)                         | \$ 139,898.00          | \$ 234,658.00          | \$ 234,658.00          | \$ 234,658.00          | \$ 234,658.00          | \$ 214,658.00          |
| Capital Improvements   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |
| Other Principal Payments   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |
| Operating Leases   | \$ 14,554.00           | \$ 14,700.00           | \$ 14,847.00           | \$ 14,995.00           | \$ 15,145.00           | \$ 15,296.00           |
| Interest Payments  | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |
| Interest Expense   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |
| Depreciation Expense   | \$ 62,821.00           | \$ 125,000.00          | \$ 125,000.00          | \$ 125,000.00          | \$ 125,000.00          | \$ 125,000.00          |
| Insurance (Facility)   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |
| Purchase of Furniture, Fixtures, & Equipment                               | \$ 4,800.00            | \$ 4,896.00            | \$ 4,994.00            | \$ 5,094.00            | \$ 5,196.00            | \$ 5,300.00            |
| Electric & Gas   | \$ 36,996.00           | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |
| Water & Sewage   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |
| Repair and Maintenance Services (including cost of supplies)               | \$ 5,000.00            | \$ 5,000.00            | \$ 5,050.00            | \$ 5,101.00            | \$ 5,152.00            | \$ 5,203.00            |
| Custodial Services (including cost of supplies)                            | \$ 43,200.00           | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |
| Waste Disposal   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |
| Security Services  | \$ 3,000.00            | \$ 3,030.00            | \$ 3,060.00            | \$ 3,091.00            | \$ 3,122.00            | \$ 3,153.00            |
| Other Facility Expenses (please describe)                                  | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |
| <b>Total Facilities Expenses:</b>  | <b>\$ 310,269.00</b>   | <b>\$ 387,284.00</b>   | <b>\$ 387,609.00</b>   | <b>\$ 387,939.00</b>   | <b>\$ 388,273.00</b>   | <b>\$ 368,610.00</b>   |
| <b>Other Expenses - See Footnotes</b>                                      |                        |                        |                        |                        |                        |                        |

Drop-In Center Staffing

Other Compensation (Row 94)

Other Instructional Supplies and Resources (Row 108)

Certification supplies and costs, barrier removal

Other Administrative Expenses (Row 114)

Graduation, Employment, Office Supplies, Dues, Drop-In Center Supplies

Other Governing Board Expenses (Row 120)

Other Services (Row 138)

Lease, Mortgage, & Other Facilities (Rows 143, 158)

Lease for building

Other Expenses (Row 167)

|   |                        |                        |                        |                        |                        |                        |
|---|------------------------|------------------------|------------------------|------------------------|------------------------|------------------------|
| Indiana Charter School Board Administrative Fee (6) | \$ -                   | \$ 14,428.13           | \$ 14,428.13           | \$ 15,187.50           | \$ 15,187.50           | \$ 15,187.50           |
| Management Fee (7)                                  | \$ 357,001.00          | \$ 252,928.00          | \$ 296,573.00          | \$ 256,471.00          | \$ 164,629.00          | \$ 198,475.00          |
| Bank Fees   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |
| Escrow  | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |
| Other Expenses (please describe)                    | \$ 9,619.00            | \$ -                   | \$ -                   | \$ -                   | \$ -                   | \$ -                   |
| <b>Total Other Expenses:</b>                        | <b>\$ 366,620.00</b>   | <b>\$ 267,356.13</b>   | <b>\$ 311,001.13</b>   | <b>\$ 271,658.50</b>   | <b>\$ 179,816.50</b>   | <b>\$ 213,662.50</b>   |
| <b>TOTAL EXPENSES:</b>                              | <b>\$ 1,941,828.02</b> | <b>\$ 1,983,017.09</b> | <b>\$ 2,061,556.87</b> | <b>\$ 2,062,177.37</b> | <b>\$ 2,062,804.06</b> | <b>\$ 2,063,437.09</b> |
| <b>CHANGE IN NET ASSETS:</b>                        | <b>\$ 162,141.93</b>   | <b>\$ 121,771.86</b>   | <b>\$ 128,181.13</b>   | <b>\$ 128,180.63</b>   | <b>\$ 128,180.94</b>   | <b>\$ 128,180.91</b>   |

ICSB Admin Fee for current year.

**Footnotes:**

- (1) 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.
- (2) This is a competitive grant. Funding is not guaranteed. The funding for the PCSP grant is distributed through a reimbursement process. Contact IDOE's Office of Title Grants and Support for more information.
- (3) 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.
- (4) Includes Staffing for Instruction and Curriculum Development, Instructional Staff Training, etc.
- (5) Secretary; Receptionist; Attendance Clerk; Office Manager, Cafeteria Worker, and other full or part-time employees not specifically described.
- (6) Three quarters of one percent (0.75%) of the basic tuition support or adult learner grant amount received by the school.
- (7) 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 amounts separate from a specific "management fee" paid to a management company or an affiliate of the management company must be included elsewhere in the worksheet (e.g., lease payments, instructional supplies, software, technology, etc.) and described in the "Other Expenses" Column and/or in the Budget Narrative.

**The Excel Center – Anderson**  
**Budget Narrative**

**State Funding:**

Fixed assumptions by ICSB have held funding at the current rate throughout the projection. An increase in available seats is assumed in the next budget cycle

**Federal Funding:**

Federal funding includes funding through the Part B Federal Special Education grants. Funding within the five-year budget is projected to increase 1%. The Excel Center will have ESSER II and ESSER III through 2024 which is included in this projection.

**Other Revenue:**

Budgeted amount represents 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:**

Prior year actual and current year budget were used to develop the 5-year projection, assuming a 1-2% increase in most areas. 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.

**Support Supplies:**

As described in the line, this includes operating supplies, dues, and graduation expenses. We also used prior year actual and the current year budget to calculate this amounts, assuming a 1-2% increase in most lines.

**Professional or Contracted Services:**

The annual financial audit as well as insurance and contracted security were all projected with slight increases over the 5-year term. All other elements were increased by 1%.

**Facilities Expense:**

We are currently in negotiation to move to a new location and the costs are reflective of that move.

Depreciation is planned to increase over this period due to some needed build out in the new space.

**Other Expenses:**

Management fees to Goodwill Education Initiatives (GEI) have been reduced in this projection to reflect the support provided by GEI given this funding scenario.

**Other Financial Considerations, Depending on Potential State Funding Changes:**

If the Indiana General Assembly should make changes to state funding, GEI has several layers of support for the Anderson Excel Center that will be enacted as needed once future funding is known. These supports include, use of GEI reserves, applying for grants from the Goodwill Foundation (part of our parent Goodwill organization – Goodwill of Central and Southern Indiana), and the sharing of some specialized staff positions between two or more of our Excel Centers.

Exhibit C

**Statement of Assurances**

The charter school agrees to comply with 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 Indiana Code ("IC") § 20-24.
- 3. Recipients will, for the life of the charter, participate in all data reporting and evaluation activities as required by the Indiana Charter School Board ("ICSB") and the Indiana Department of Education. See in particular IC § 20-20-8-3 and relevant sections of IC § 20-24.
- 4. Recipients will comply with all relevant federal laws including, but not limited to, the *Age Discrimination in Employment Act* of 1975, Title VI of the *Civil Rights Act* of 1964, Title IX of the *Education Amendments of 1972*, section 504 of the *Rehabilitation Act* of 1973, Part B of the *Individuals with Disabilities Education Act*, and section 427 of the *General Education Provision Act*.
- 5. Recipients receiving federal Charter School Program Grant funds 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*, 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 and assessments.
- 8. Recipients will operate with the organizer serving in the capacity of fiscal agent for the charter school and in compliance with generally accepted accounting principles.

- 9. Recipients will at all times maintain all necessary and appropriate insurance coverage.
- 10. Recipients will indemnify and hold harmless the ICSB, the State of Indiana, all school corporations providing funds to the charter school (if applicable), and their officers, directors, agents and employees, and any successors and assigns from any and all liability, cause of action, or other injury or damage in any way relating to the charter school or its operation.
- 11. Recipients understand that the ICSB may revoke the charter if the ICSB deems that the recipient is not fulfilling the academic goals, fiscal management, or legal and operational responsibilities outlined in the charter.

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

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

**Betsy Delgado**

SVP, Chief Mission & Education Officer

Name

Title



**10/15/2021**

Signature

Date